



Sage 300 2019

Installation and Administration Guide

May 2018

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Contents

Chapter 1: Introduction

System Requirements.....	1-1
Network Configuration	1-2
Typical Network Configurations	1-3
Where To Now?.....	1-5

Chapter 2: Installing Sage 300 Programs

Before You Begin.....	2-1
Installation Considerations	2-1
Using Sage 300 Sample Data.....	2-3
Installing Sage 300	2-4
Installing the Programs	2-4
Entering License Information	2-6
Setting Up Workstations.....	2-8
Workstation Setup Utility.....	2-8
Setting Up a Workstation	2-9
Running Sage 300 Intelligence Reporting for the First Time	2-9
Where To Now?.....	2-10

Chapter 3: Database Setup

Overview of Database Setup.....	3-1
Creating System, Company, and Portal Databases	3-1
Creating Microsoft SQL Server Databases	3-2
Setting Up Company and System Databases.....	3-9
Setting Up a System Database.....	3-9
Assigning Company Colors	3-12
Setting Up a Company Database	3-13
Setting Global Security Options.....	3-15
Where To Now?.....	3-17

Chapter 4: Activating Sage 300

Before You Begin.....	4-1
Signing On to a New Company	4-2
Creating the Company Profile	4-4
Entering Company Information	4-5
Activating Your Data	4-8
Change the Administrator's Password	4-10
Change the ADMIN Password	4-11
Where To Now?.....	4-12

Chapter 5: Configuring Sage 300 Web Screens

Overview.....	5-1
Configuring Security for Web Screens	5-2
Configuring the Portal Database	5-3
Configuring a Microsoft SQL Server Express Database.....	5-4
Configuring English Windows to Display Chinese	5-5
Setting Up a User Account for IIS and Windows Services.....	5-5
Starting the Sage 300 Web Screens	5-6

Chapter 6: Performing Administrative Tasks

Add Users	6-1
Using Windows as the Authentication Method	6-3
Set Up Security Groups and Assign User Authorizations	6-5
Create Security Groups	6-5
Authorizing Users	6-6
Create and Assign UI Profiles for Customized User Interface Forms	6-7
Set Up Customization Directories	6-11
Remove Sage 300 Programs.....	6-11

Chapter 7: Licensing Sage 300

Licensing Products and Users.....	7-1
LanPak Licenses	7-2
Creating a Temporary LanPak License.....	7-2
Requesting Activation Codes.....	7-4
Updating Your Sage 300 Licenses.....	7-5
Viewing License Information	7-7
Monitoring LanPak Activity	7-7

Chapter 1

Introduction

Read all chapters in this guide before you install or set up a new installation of Sage 300.

This guide provides the information you need to:

- Install Sage 300.
- Set up databases for use with Sage 300.
- Set Sage 300 security.
- Set up Workstations to run Sage 300.
- Activate your data for new accounting programs.
- Configure the Sage 300 web screens.
- Set up users and groups, and perform other administrative tasks.
- Understand Sage 300 licensing.

The order of topics in this self-teaching guide matches the sequence of tasks you would typically perform to install and set up Sage 300.

Integration with
Sage CRM

To find out how to integrate Sage 300 with Sage CRM, see the *Sage CRM Integration Guide*.

Important!

This guide contains troubleshooting tips and technical information on configuring supported operating systems and database engines for use with Sage 300. However, this guide is not a replacement for a qualified network or database administrator.

Depending on your purchase agreement, some features described in this guide may not be available in your product.

System Requirements

Before you can install Sage 300, your hardware and your operating system must be correctly configured and fully operational.

For a complete list of hardware and operating system requirements for workstations and servers, see the *Compatibility Guide*:

<https://support.na.sage.com/selfservice/viewdocument.do?externalId=26777>

Network Configuration

You can configure Sage 300 in a number of ways. The best configuration for your company depends on the number of users who need to use Sage 300 programs and data concurrently, and your network setup.

Each network configuration contains the following components:

- **Server** — The computer that hosts the Sage 300 data, and optionally, Sage 300 programs.

In a small workgroup, a workstation may act as a server, providing other workstations with access to Sage 300 data and programs.

- **Workstation** — A computer that connects to a server to access Sage 300 programs and/or data. A workstation may:
 - Run the Sage 300 desktop.
 - Connect to Sage 300 via an Internet browser.
 - Connect to another workstation or server using Remote Desktop Protocol (RDP).
- **Database Engine** — The software used to create, retrieve, update, and delete data from a database.

Sage 300 works with the Microsoft SQL Server database engine only. Refer to the *System Requirements* section for supported versions.
- **Sage 300 Program Files** — These include:
 - The Sage 300 System Manager.
 - Accounting applications, such as Accounts Receivable and Accounts Payable.
- **Sage 300 Shared Data** — This includes:
 - Site folder.
 - User folder.
 - Data.
 - Company folder.
 - License Files (*.lic).
- **Sage 300 Databases** — In Sage 300, there are two types of databases:
 - The **System** database stores information on users, passwords, security groups, security settings, and currency for all the companies that are linked to it.
 - The **Company** database contains information that is shared by all the company's accounting applications. This includes the company

profile, fiscal calendar, optional field data, tax information for both sales and purchases, bank information, and all the accounting data for the company. Each company database must be linked to a system database.

Typical Network Configurations

This section describes the most common network configurations, including:

- Single computer.
- Windows peer-to-peer network.
- Client-server network.

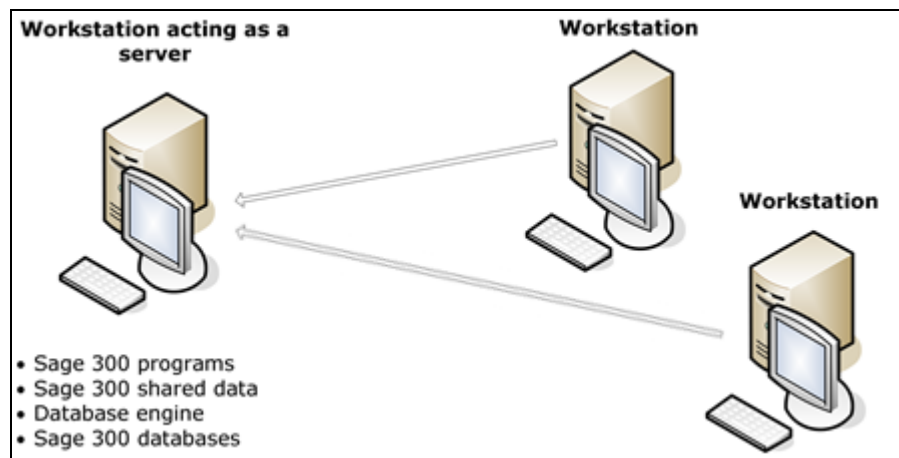
Single “Standalone” Computer

Installing on a single computer is the simplest configuration. All components are installed on one computer.

Windows Peer-to-Peer Network

A Windows peer-to-peer network allows the server and workstations to share resources. This type of network is good for small workgroups, consisting of two to five workstations networked together using Microsoft Windows Network. One of the workstations acts as a server, allowing other computers to access data stored on its hard drive.

If more than two users require concurrent access to Sage 300 data or programs, the workstation acting as the server should be dedicated. You may encounter performance issues if you run Sage 300 on the server at the same time as other users are accessing Sage 300 from their workstations.

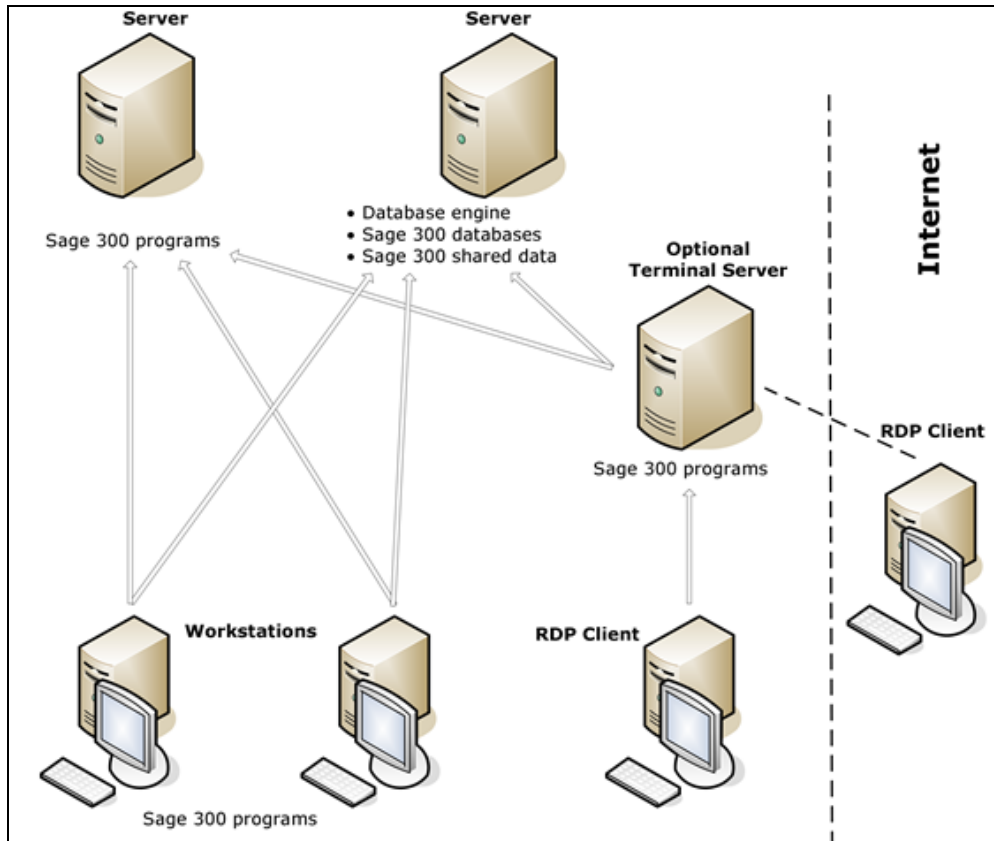


Client-Server Network

In a client-server configuration, Sage 300 programs and databases are on one or more dedicated servers.

The optional Terminal Server may also reside on the same physical server.

Workstations may access programs as well as data from the server(s), or may have Sage 300 programs installed locally for better performance.



Note: On each workstation that will run Sage 300 programs locally, you must install System Manager and the accounting applications.

If you use Sage 300 Intelligence Reporting, note that:

- Databases must reside on a single server.
- If you use a Citrix server, there are some special considerations. For more information, see the *Sage 300 Intelligence Reporting Citrix Installation Guide*.

Sage 300 Integrated with Sage CRM

Similar to Sage 300, Sage CRM can be installed locally, or on a server, or be deployed on the Web.

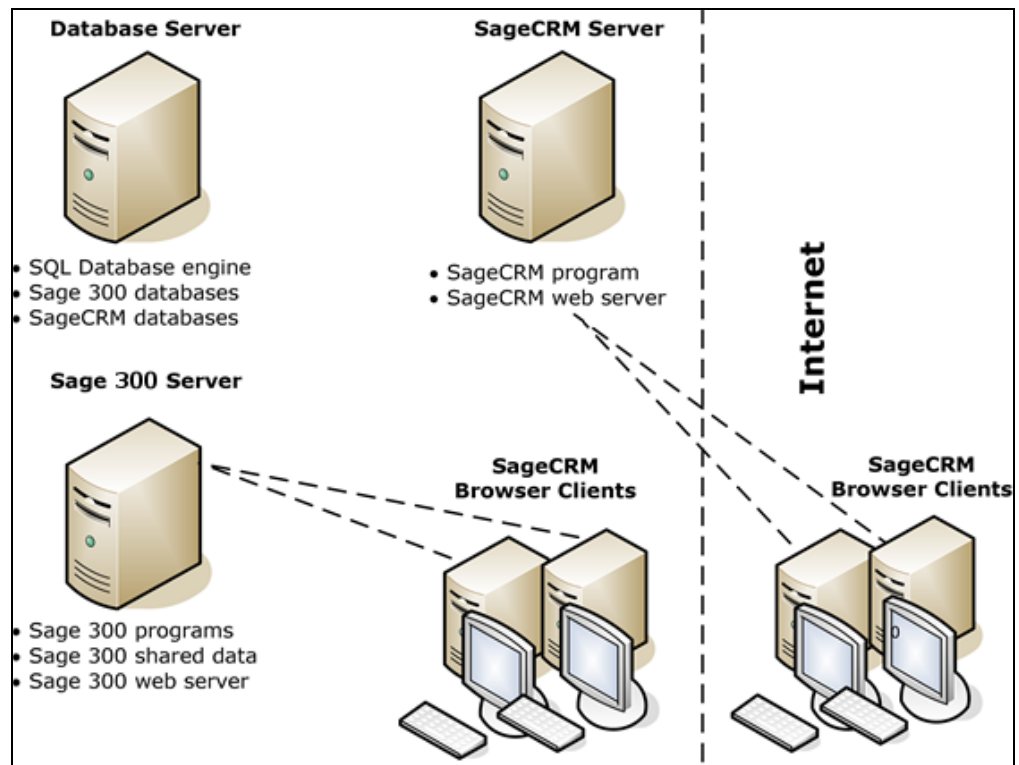
In the illustration below, we've shown the Sage 300 Web server and the Sage CRM Web server on separate computers.

Note: The Sage 300 and Sage CRM Web server can reside on the same computer. Typically, one database server stores both the Sage CRM and Sage 300 data.

Recommendation

For better security and performance, do not store shared data on the Web server.

For more information about integrating Sage 300 with Sage CRM, see the *Sage CRM Integration Guide*.



Where To Now?

You are now ready to install Sage 300.

Chapter 2

Installing Sage 300 Programs

This Chapter explains how to install System Manager, Sage 300 accounting programs, and Sage 300 Intelligence Reporting.

Before You Begin

Understand the implications for your chosen configuration

Before proceeding, be sure you understand the different system configurations and their implications for installing Sage 300:

- On a single workstation and on a network.
- Over different operating systems.

Use the information in Chapter 1, "Introduction," to help you determine the configuration that best meets your company's needs.

Make sure your system meets minimum requirements

Also, make sure that the computer on which you are installing Sage 300 meets at least the minimum system requirements for the configuration you choose. For up-to-date information on system requirements, see the *Compatibility Guide*:

<https://support.na.sage.com/selfservice/viewdocument.do?externalId=26777>

If you are upgrading...

WARNING: If you are upgrading an existing system to the current version of Sage 300, use the instructions in the *Sage 300 Upgrade Guide* to prepare for and upgrade to the current version.

Installation Considerations

Read the following sections before you install Sage 300.

Considerations for Installing on a Windows Peer-to-Peer Network

Before installing or upgrading Sage 300 on a Windows Peer-to-Peer network, be aware of the following special considerations:

- Each workstation must be running Windows 7 or Windows 8.
- A maximum of five users is supported when running in a peer-to-peer environment.

- If more than two users require concurrent access to Sage 300 data or programs, the workstation acting as the server should be dedicated. You may encounter performance issues if you run Sage 300 on the server at the same time as other users are accessing Sage 300 from their workstations.
- On the workstation that will be acting as the server, share the Sage 300 Program and Shared Data folders, as follows:
 - Share the Program and Shared Data folders.
 - On each workstation, use Universal Naming Convention (UNC) paths to connect to the shared folder. For example, \\server\share. If you choose to map a drive letter to the shared folder on the server, then in the Map Network Drive window, select the Reconnect at Logon check box to create a persistent connection.

Considerations for 64-bit Windows Operating Systems

Sage 300 is a 32-bit program. When you create a data source for Sage 300, you must use the 32-bit version of the ODBC Administrator.

In 64-bit versions of supported Windows operating systems, you can find the 32-bit ODBC Administrator in the following location:
C:\Windows\SysWOW64\odbcad32.exe.

Considerations for Installing the Sage 300 Web Screens

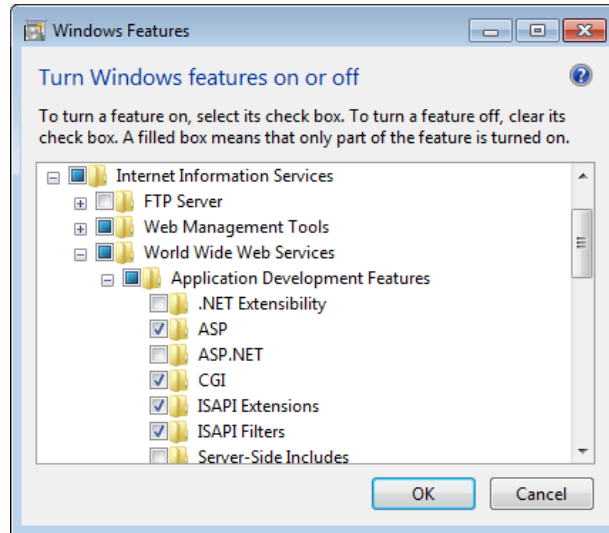
Sage 300 web screens bring the power of Sage 300 to your web browser, providing a browser-based interface for Sage 300, with graphical presentations of key financial data.

If you intend to install the Sage 300 web screens, you must first:

- Ensure that Microsoft's Internet Information Services (IIS) is installed on the server that will host the Sage 300 web screens.

If IIS is not installed, install it **before** you attempt to install the Sage 300 web screens.

- When selecting Windows features, under World Wide Web Services' Application Development Features, select the ASP, CGI, ISAPI Extensions, and ISAPI Filters options, as shown here:



Using Sage 300 Sample Data

Sage 300 comes with two sample company databases that let users experiment and become familiar with Sage 300 features before they work with your company data. The two databases are:

- **SAMINC.** A single-currency database for a US company named Sample Company Inc. It uses the US Payroll program.
- **SAMLTD.** A multicurrency database for a Canadian Company named Sample Company Ltd. It uses the Canadian Payroll program.

Both databases contain data for the following accounting modules:

- General Ledger
- Accounts Receivable
- Accounts Payable
- Inventory Control
- Order Entry
- Purchase Orders
- Payroll (US or Canadian)
- Project and Job Costing

You can choose to install sample data when you install Sage 300.

Note: If you use Sage 300 Intelligence Reporting, sample data is required for demonstration reports.

Installing Sage 300

You install Sage 300 System Manager, System Manager Components, and all Sage 300 accounting applications in one continuous process, consisting of two phases:

1. Installing the programs.
2. Entering license information (unless you have already installed licenses for this version).

Installing the Programs

1. Insert the Sage 300 installation DVD into your DVD drive.

If the installation screen does not appear automatically, go to the DVD root directory (for example, d:\), and run LAUNCH.EXE.

A screen may appear prompting you to install one or more programs and tools that are required by Sage 300.

2. On the installation screen, click View Pre-Installation Checklist. Print a copy of the checklist and follow all steps before you continue.
3. On the installation screen, click Sage 300.
4. On the Sage 300 installation screen, click Sage 300.
5. On the Welcome screen, click Next.
6. Click the option to accept the license agreement, and then click Next.
7. Select the geographical region where you are installing the software, and then click Next.
8. For the client information, enter your 7-digit or 10-digit client ID and the company name to use for registration, and then click Next.
9. For the optional information, enter a contact person, your dealer, and certified consultant, and then click Next.
10. Select the edition of Sage 300 you require, and then click Next.
11. Specify the names and locations of your program and data folders, and then click Next.

Note: To use web screens, you must specify the full path for the shared data folder (do not specify a mapped drive) and a local path for the programs folder (do not specify a mapped drive or a UNC path).

12. On the Select Features screen, select features and applications to install, and then click Next.

Program
dependencies

Most of the applications require you to install others, and all of them require core System Manager files. The following list shows any additional requirements in parentheses for each application:

- Bank Services (requires Tax Services, G/L Subledger Services).
- Accounts Payable (requires Bank Services, Tax Services, G/L Subledger Services).
- Accounts Receivable (requires Bank Services, Tax Services, G/L Subledger Services).
- Inventory Control (requires G/L Subledger Services).
- Order Entry (requires Accounts Receivable, Inventory Control, Tax Services).
- Purchase Orders (requires Accounts Payable, Inventory Control, Tax Services).
- Project and Job Costing (requires G/L Subledger Services, Accounts Payable, Accounts Receivable, Tax Services).
- G/L Consolidations (requires General Ledger).
- Intercompany Transactions (requires General Ledger).
- Sage Intelligence Reporting (requires the Financials Suite).
- Payment Processing (requires Accounts Receivable, Order Entry, and Sage Exchange).

13. On the next screen, in the Program Folder field, type the location on the Start menu where you want Sage 300 to appear, then click Next.

14. Click Install.

Enter activation
codes

Once installation has finished, the Sage 300 License Manager appears if you have not already installed licenses for this version. Follow the instructions in the next section to enter license information.

Entering License Information

The License Information tab shows information entered during installation:



The screenshot shows the 'Sage 300 ERP License Manager' window with the 'License Information' tab selected. The window contains several input fields and buttons:

- Client ID:** A text box containing '0000001' and a 'Change' button to its right.
- Company:** A text box containing 'Sage' and a 'Change' button to its right.
- Licensed To:** A text box containing 'Sage'.
- Dealer:** A text box containing 'Sage'.
- C.C.:** A text box containing 'Sage'.
- Close:** A button at the bottom right of the window.

Note: Do not change the company name unless you need to change the business entity to which the programs are registered.

If you change the company name, the licenses will appear Unauthorized, until you apply for and enter new activation codes.

To enter Sage 300 license information:

1. If you have activation codes for your Sage 300 programs, click the Licenses tab, then, for each Sage 300 program:
 - a. Double-click in the Serial Number column, and then enter the serial number.
 - b. Double-click in the Activation Code column, and then enter the activation code.
 - c. For subscription licenses, double-click in the Expiry Date column, and then enter the expiry date.

If you don't yet have activation codes, you can use the 30-day temporary licenses created during installation, and record the permanent code later, as described in Chapter 7, "Licensing Sage 300."

2. If you installed Analysis Connector modules for Sage 300 Intelligence Reporting, enter their activation codes on the Licenses tab.

Note: The Report Manager, Report Viewer, Analysis, and Connector programs are not available with a 30-day license. You must have a permanent license to use them. (Sage 300 comes with one free Report Manager license.)

3. Click the Users tab.

Note: The system allows you to register only one LanPak license. If a temporary LanPak license exists for this version, skip to step c, and then follow the remaining instructions to enter your permanent registration on the existing line.

- a. Right-click the grid, and then select Insert from the menu that appears. The new entry shows your current Sage 300 version and edition.
- b. In the new line, double-click the License Type column, and then select LanPak from the list.

Do not select a database-specific entry!

- c. Double-click in the Count column, and then type the total number of users who require Sage 300 access for this installation. (The count is the sum of existing users plus the new users for whom you're adding LanPak licenses.)

If you have a permanent license for this version, and you are asked if you want to overwrite the existing license, click Yes.

The system immediately deletes any existing LanPak licenses.

- d. Double-click in the Serial Number column, and then type the LanPak serial number that Sage provided.
- e. Double-click in the Activation Code column, and then type the activation code that Sage provided.

If you don't yet have an activation code, you can create a temporary license by leaving the activation code blank.

- f. Press Tab, or click elsewhere on the grid, to leave the field.

The system changes the Count to the purchased amount (if necessary) and enters Activated in the Activation Code field.

LanPak

IMPORTANT: You must record at least one LanPak license to use Sage 300.

For Sage 300 Intelligence Reporting, one Report Manager license for one user is free with Sage 300. If you have additional licenses for Report Manager and Report Viewer, enter their activation codes in the Activation Code column.

4. Click Close.
5. Click Finish to close the Installation wizard.

Setting Up Workstations

Workstation Setup Utility

The Workstation Setup utility is a component of the System Manager installation. It installs the components that a workstation requires to run System Manager and accounting modules on a server.

You must run Workstation Setup on each workstation that will run Sage 300 programs from a server.

Note: You do not need to run Workstation Setup on a workstation to use the Sage 300 web screens.

Do *not* run Workstation Setup if:

- The workstation will run Sage 300 programs locally.

In this case, install Sage 300 System Manager and the accounting applications on the workstation, as described earlier in this chapter.

- The workstation is using Remote Desktop Protocols (RDP) to remotely control another workstation or server.

In this case, install Remote Desktop Client on your remote computer. Then, connect through a Terminal Server or directly to a workstation or server that is configured for remote access.

Note: This guide does not include instructions for setting up terminal services or RDP. Talk to your network administrator about this option.

Setting Up a Workstation

1. Share your Sage 300 program folder, with at least the following permissions for users:
 - Read
 - Read and Execute
2. Share your Sage 300 data folder, with Full Control permission for users.
3. Create your system and company databases. For more information, see Chapter 3, "Database Setup."
4. On the workstation, run the Workstation Setup utility:
 - a. Locate the setup.exe file for the utility. By default, it is in the Sage 300 program folder on the server where you installed Sage 300:
\\<server>\<program folder>\WSSetup\setup.exe
 - b. Right-click setup.exe, and then click Run As Administrator.
5. Enter the paths for your shared program folder and data folder.

Running Sage 300 Intelligence Reporting for the First Time

The first time you run Sage 300 Intelligence Reporting, you must log in as the Windows administrator.

A user with Windows administrator privileges must register the ActiveX component, BICore.exe, that Intelligence Reporting requires. To register this component, open any Sage 300 Intelligence Reporting form. Once the component is registered, other types of users can open these forms.

If you use workstation setup, you must also run Sage 300 Intelligence Reporting workstation setup (located in BX66A\WSSetup) on every workstation where you will view and use Intelligence Reporting screens.

Where To Now?

New installation

If you are installing Sage 300 for the first time, you must create and set up system and company databases.

If you plan to use the Sage 300 web screens, you must also create a portal database.

For information on setting up databases for Sage 300, see Chapter 3, "Database Setup."

Activating data

Once you have set up company and system databases, you can activate your data for the current version, as described in Chapter 4, "Activating Sage 300."

Configuring the web screens

If you installed the Sage 300 web screens, you need to configure them to connect them to the portal database.

For information about configuring the Sage 300 web screens, see Chapter 5, "Configuring Sage 300 Web Screens."

Grace period for temporary licenses

You can use temporary licenses for 30 days while you wait for your activation codes. However, you must enter activation codes before the grace period ends, or you will no longer have access to Sage 300.

For instructions on updating your licenses, see Chapter 7, "Licensing Sage 300."

Upgrading an existing system

If you are upgrading an existing system, refer to the *Sage 300 Upgrade Guide* for steps on activating your data and for important information about the conversion of your data, including additional steps you may need to take before and after activation.

Chapter 3

Database Setup

In this chapter, you'll learn how to create your Sage 300 system, company, and portal databases, and how to set global security options.

This chapter does not provide detailed instructions on how to install or configure database software. See your database or network administrator for detailed instructions and support.

To get the most recent list of supported database versions, see the *Compatibility Guide*:

<https://support.na.sage.com/selfservice/viewdocument.do?externalId=26777>

Overview of Database Setup

Before you can create a company in Sage 300, you must create system and company databases using Microsoft SQL Server.

Portal database

If you plan to use the Sage 300 web screens, you must also create a portal database in Microsoft SQL format. Normally, you create the portal database on the same server as your company database.

After creating the databases using your database software, you use the Database Setup utility to set up the databases for Sage 300.

Creating System, Company, and Portal Databases

In Sage 300, there are three types of databases:

- **System Database.** Stores information on users, passwords, security groups, security settings, and currency for all the companies that are linked to it. You must create a system database before creating a company database.
- **Company Database.** Contains information that is shared by all the company's accounting applications. This includes the company profile, fiscal calendar, optional field data, tax information for both sales and purchases, bank information, and all the accounting data for the company. Each company database must be linked to a system database. Multiple company databases can be linked to the same system database.

- **Portal Database.** The portal database stores files used by the Sage 300 web screens.

The portal database is shared by all companies in a Sage 300 installation, so you set up only one portal database.

Database ID

Sage 300 uses a Database ID to identify databases. Each ID is a unique code of uppercase characters, consisting of letters from A to Z, or numbers from 0 to 9, or any combination of letters and numbers.

Note: The ID for system and company databases cannot be more than six characters long. This restriction does not apply to portal database IDs.

For simplicity, we recommend that the Database ID, the database, the folder for the database, and the Data Source Name (DSN) be identical.

The sections that follow provide instructions for creating system, company, and portal databases.

Creating Microsoft SQL Server Databases

Creating Databases in SQL Server Management Studio

1. On the server, On Windows' Start menu, select Programs > Microsoft SQL Server <version> > SQL Server Management Studio.

The Connect to Server screen appears.

2. For Server type, select Database Engine.
3. Accept the Server name that is displayed (the name of the computer you are currently working on).
4. For Authentication, we recommend that you use SQL Server Authentication.

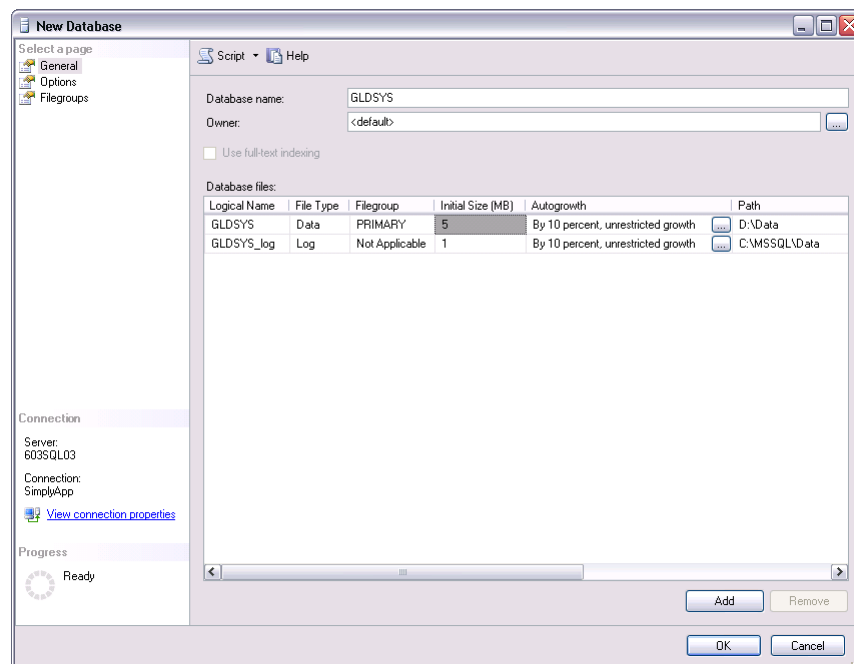
Important!

You must use SQL Server authentication for the portal database.

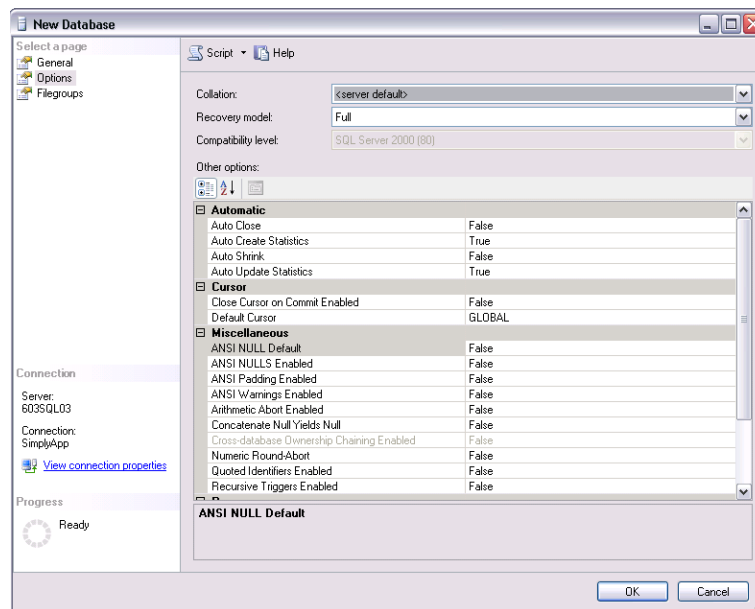
Type in the database administrator's Login name and Password.

5. Click Connect to open SQL Server Management Studio.
6. In the Object Explorer panel, expand the folder tree for the SQL Server, and then expand the Databases folder tree.
7. Right-click Databases, and then select New Database... from the menu.

The New Database window appears, as follows:



8. In the Database name field, type the 6-character name for the system database.
9. In the Database files section:
 - a. In the Initial Size column, specify the amount of disk space that SQL Server will initially reserve for the Sage 300 database. For new databases, use the default value.
 - b. In the Autogrowth column, you can select whether the container grows by a fixed percentage or by a fixed amount of disk. For new databases, use the default value.
10. In the left pane, click Options.



- a. For English-language support, use Latin1_general_bin or Latin1_general_ci as the collation method.

Collation method

We recommend that you use a binary collation method, such as Latin1_general_bin.

- b. For Recovery Model, select Full.

11. Click OK.

Extended Properties

Warning: If you are setting extended properties for your database, make sure you do not turn on the XACT_ABORT property. This feature is not supported by Sage 300.

12. Repeat steps 7 to 11 to create your company database. In step 8, type the 6-character name for the company database.

13. Repeat steps 7 to 11 to create your portal database. In step 8, type the 6-character name for the portal database. (We recommend using PORTAL as the name of your portal database.)

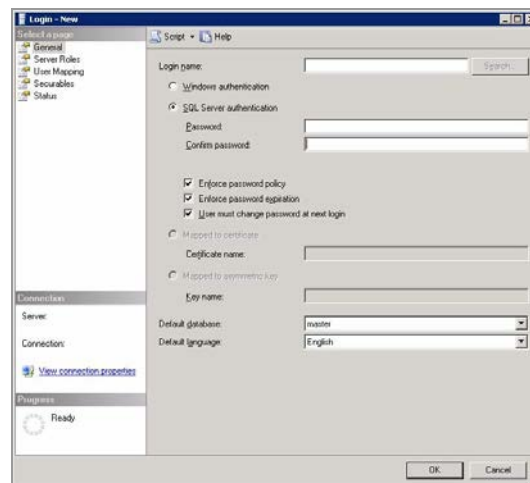
Creating and Assigning Database Rights to a SQL Login ID

A SQL Login ID is required to log in to a Sage 300 database. The ID is not revealed to users; Sage 300 uses this ID internally when it connects a user to the SQL Server.

Important! To improve the security of your system, you should use a different SQL Login ID for the portal database than the SQL Login ID specified for system and company databases.

1. In SQL Management Server Studio, in the left-side Object Explorer panel, expand the Security folder.
2. Right-click Logins and then click New Login... from the right-click menu.

The New Login form appears, as follows:



3. In the Login name field, type a name for your new SQL Login ID.
4. Select SQL Server Authentication, and then type in a password, and confirm it.
5. Click OK to save your changes.

In the Object Explorer, your new Login name appears within the Logins folder.

6. Assign database rights to the new SQL Login ID.
 - a. In the Object Explorer, expand the Logins folder, and then double-click the new Login name you created.

The Login Properties form appears.

- b. In the left pane, click Server Role, and in the right pane, select sysadmin.
 - c. In the left pane, click User Mapping.
 - d. In the Database column, select the system and company databases you created.
 - e. Under Database role membership for, select db_owner.
 - f. Click OK to save your changes.

Creating ODBC Connections on Client Workstations

If you are using a DSN to connect to your SQL databases on the server, on all client workstations, create an ODBC connection to your databases.

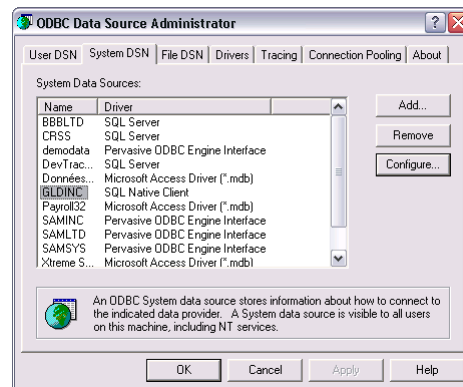
Important!

If you do not create a Data Source (DSN) to connect to your databases, Sage 300 can connect to the SQL Server directly using the server name and default settings.

1. Open the ODBC Data Source Administrator.

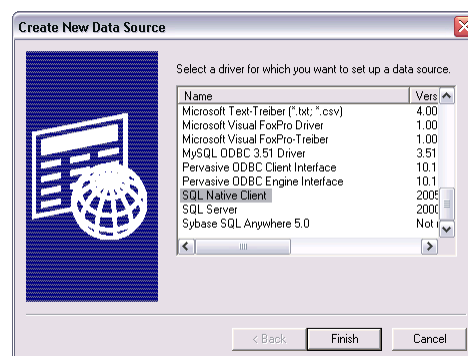
Sage 300 is a 32-bit application. When you create a data source for Sage 300, you must use the 32-bit version of the ODBC Administrator.

In 64-bit versions of supported Windows operating systems, you can find the 32-bit ODBC Administrator in the following location:
C:\Windows\SysWOW64\odbcad32.exe.



2. Select the System DSN tab, and then click Add.

The Create New Data Source form appears:



3. Select SQL Server Native Client 11, and then click Finish.

The Create A New Data Source To SQL Server form appears:

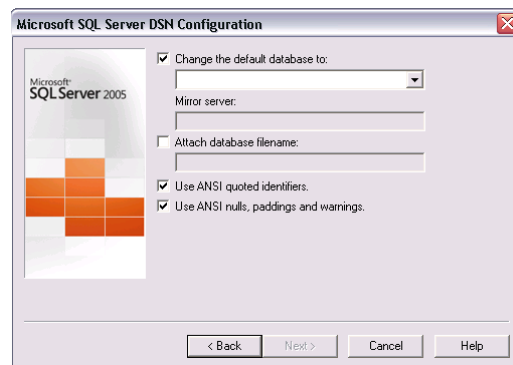
4. Enter the following information for the Data Source:
 - a. In the Name field, type the 6-character name of the system database.
 - b. Type an optional description.
 - c. Select the database server from the list.

Note: When creating the DSN for a portal database, if you specify a named instance of SQL Server, be sure to append the database port number. For example, specify SERVER\INSTANCE,1433. (If you use a nonstandard port, specify that number instead of 1433.)

5. Click Next. The following form appears:

6. Enter authentication information:
 - a. Select SQL Server authentication.
 - b. Select Connect To SQL Server To Obtain Default Settings For The Additional Configuration Options.
 - c. In the Login ID field, type in the SQL Login ID and password that you created in the previous section.
7. Click Next.

The following form appears:



8. Select the option Change The Default Database To, and then select Database For This Connection. Leave the other fields at their default values.
9. Click Next, and then Finish to create the ODBC data source.
10. Click Test Data Source to test the connection to the database.

Where To Now?

Now that you have created system and company databases in your database management system, you need to set them up for use with Sage 300, as described in the section "Setting Up Company and System Databases," later in this chapter.

If you set up a portal database, you need to configure it, as described in Chapter 5, "Configuring Sage 300 Web Screens."

Setting Up Company and System Databases

Use the Sage 300 Database Setup utility to configure your system and company databases for use with Sage 300. The Database Setup utility is installed with Sage 300 System Manager.

Important!

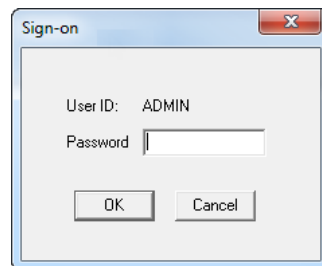
Only the Sage 300 ADMIN user can use the Sage 300 Database Setup utility, which allows the ADMIN user to:

- Add, edit, and delete system and company databases.
- Configure the Sage 300 web screens.
- Turn on security for a system database.
- Select advanced security settings, such as password options, that apply to all users.

Setting Up a System Database

1. On the server, On Windows' Start menu select All Programs > Sage 300 > Database Setup.

The Sign-on form appears:



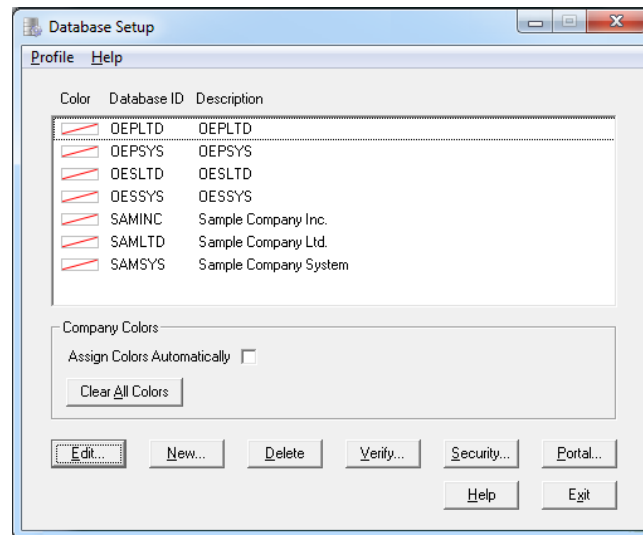
2. Sign in using the administrator (ADMIN) password.

Note: The default password is "admin."

Change ADMIN password

After creating your databases and activating your applications, change the ADMIN password to prevent unauthorized use of Sage 300. It is important that other users do not have access to the system administrator's tasks.

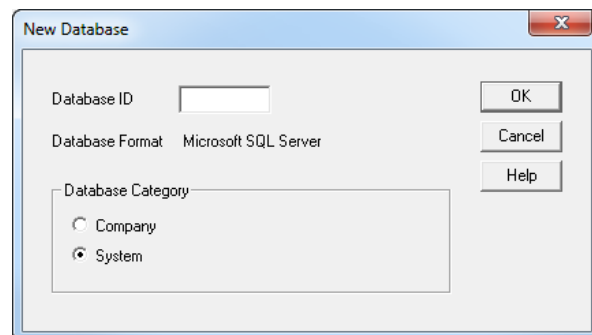
The Database Setup form appears:



Note: What you see may be different, depending on whether sample data was installed, whether other Sage 300 databases have already been created, and whether company colors have been assigned.

3. Click New, or press the Insert key.

The New Database form appears:



4. In the Database ID field, enter the name of the DSN you created for the system database.

Note: The Database ID always defaults to uppercase, and cannot be changed after it is assigned.

5. For Database Category, select System.
6. Click OK.

7. Fill in the fields on the Edit Database Profile form that appears:

The screenshot shows the 'Edit SQL Server Database Profile' dialog box. The 'Database ID' field is set to 'GLDSYS'. The 'Description' field also contains 'GLDSYS'. Under the 'Data Source / Server' section, the 'Server' radio button is selected, and the text '<server name>' is entered in the adjacent field. Below this, the 'Login ID' and 'Password' fields are empty. The 'Database' field contains '<database name>'. The 'Enable application security' checkbox is unchecked. At the bottom, there are 'OK', 'Cancel', and 'Help' buttons.

- a. In the Description field, type a description for the database, using up to 60 characters. The Database ID is displayed by default.
- b. Click the Data Source option, and then select the data source name from the Data Source field, or specify the server name for the database in the Server field. (Only data sources you created on your workstation appear in the list.)

Note that the names of the data sources must be consistent on all workstations that use the same shared Data directories. Remember, also, to type the name with the same capitalization that you used to define it with the ODBC Administrator.

- c. Enter the SQL Login ID that you created for all Sage 300 users.

Warning

Make sure you enter the SQL Login ID correctly because you will not be able to change it after you save the database profile.

- d. Enter the Password for the Login ID you entered in the previous field.

When users sign on to Sage 300, the System Manager verifies their Sage 300 passwords, then logs onto SQL Server using the Login ID and password specified here. Individual Sage 300 users do not need Login IDs for SQL Server.

- e. Enter the name of the database you created as the Sage 300 system database. Make sure you use the same capitalization that you did when you defined it with the SQL Enterprise Manager.

- f. If you intend to limit user access to accounting data, select the Enable Application Security option. (You can select this option only for system databases, not for company databases.)

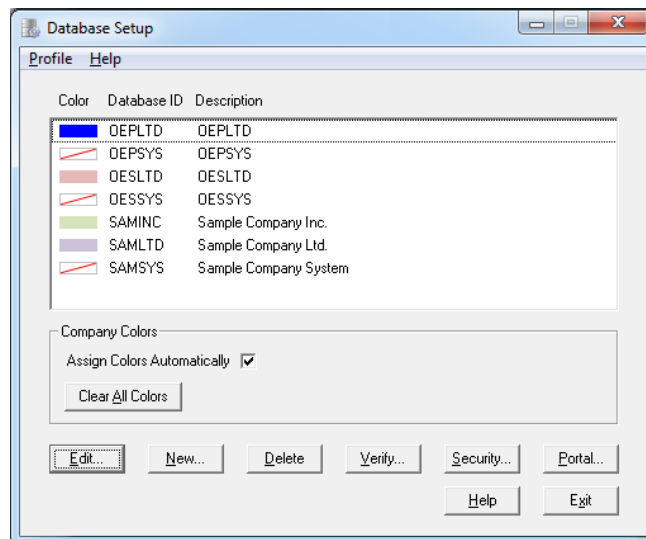
With security on, all access to application windows is then controlled by Sage 300's own security system. With security off, Sage 300 still uses the SQL Server Login ID and Password to gain access to the database, but it doesn't restrict access to Sage 300 users.

- g. Click OK.

Assigning Company Colors

If you use Sage 300 to manage multiple companies, you can assign a unique color to each company. This color appears in a border around Sage 300 forms, making it easier to see which company's information you are viewing and avoid data entry errors.

Colors assigned to companies appear on the Database Setup form:



To assign colors to companies, select the Assign Colors Automatically option. Sage 300 assigns default colors to all companies for which you have set up databases.

You can assign colors to all companies, or to as few or as many companies as you like.

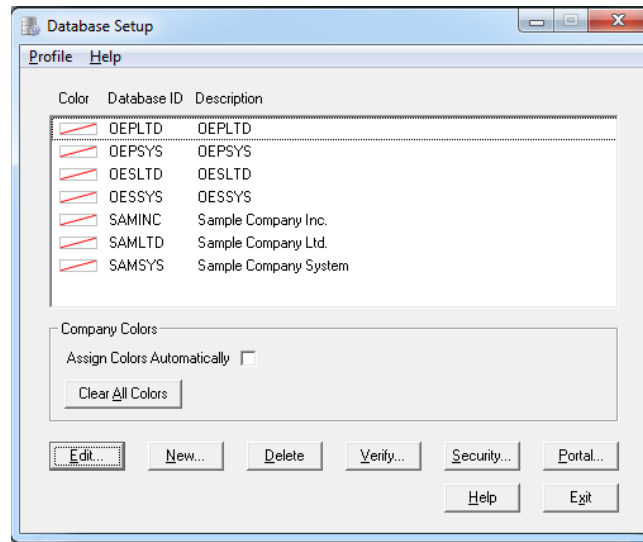
On the Edit Database Profile form, you can change the color assigned to a specific company, or turn off the company color option for that company.

If you want to clear all colors, click the Clear All Colors button on the Database Setup form.

Setting Up a Company Database

1. If Database Setup is not already running, On Windows' Start menu, select Programs > Sage 300 > Database Setup.
2. Sign in using the administrator (ADMIN) password.

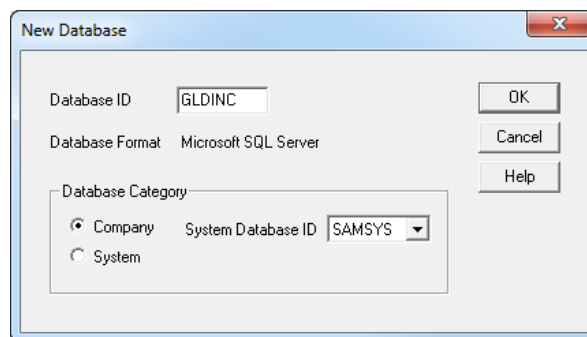
The Database Setup form appears:



Note: What you see may be different, depending on whether sample data was installed, whether other Sage 300 databases have already been created, and whether company colors have been assigned.

3. Click New, or press the Insert key.

The New Database form appears:



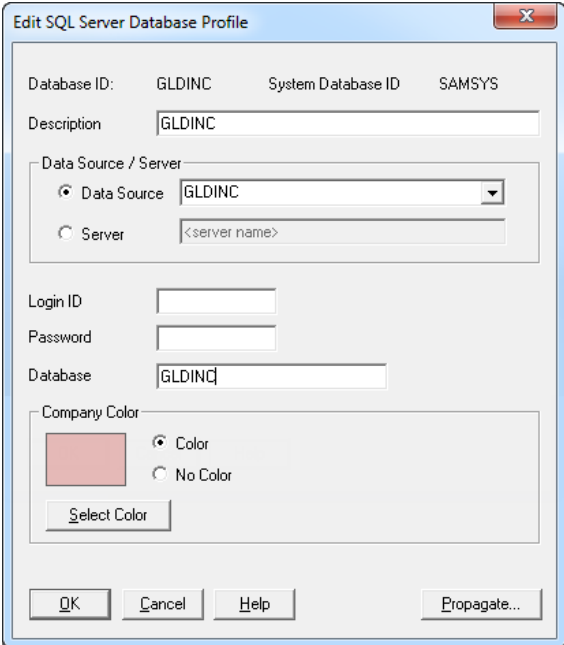
4. In the Database ID field, enter the name of the DSN you created for the company database.

Note: The Database ID always defaults to uppercase, and cannot be changed after it is assigned.

5. For Database Category, select Company.

Note: For company databases, the Database ID will appear in the title bar of windows that contain company data, such as Company Profile, Fiscal Calendar, and Optional Tables.

6. Select the system database ID you created earlier.
7. Click OK.
8. Fill in the fields on the Edit Database Profile form that appears:



The screenshot shows the 'Edit SQL Server Database Profile' dialog box. The 'Database ID' field is set to 'GLDINC' and the 'System Database ID' is 'SAMSYS'. The 'Description' field contains 'GLDINC'. Under 'Data Source / Server', the 'Data Source' radio button is selected with 'GLDINC' in the dropdown, while the 'Server' option is unselected. The 'Login ID' and 'Password' fields are empty. The 'Database' field is set to 'GLDINC'. In the 'Company Color' section, the 'Color' radio button is selected, and there is a 'Select Color' button. At the bottom, there are buttons for 'OK', 'Cancel', 'Help', and 'Propagate...'.

- a. In the Description field, type a description for the database, using up to 60 characters. The Database ID is displayed by default.

- b. Click the Data Source option, and then select the data source name from the Data Source field, or specify the server name for the database in the Server field. (Only data sources you created on your workstation appear in the list.)

Note that the names of the data sources must be consistent on all workstations that use the same shared Data directories. Remember, also, to type the name with the same capitalization that you used to define it with the ODBC Administrator.

- c. Enter the SQL Login ID that you created for all Sage 300 users.

Warning

Make sure you enter the SQL Login ID correctly because you will not be able to change it after you save the database profile.

- d. Enter the Password for the Login ID you entered in the previous field.
- e. Enter the name of the database you created as the Sage 300 company database. Make sure you use the same capitalization that you did when you defined it with the SQL Enterprise Manager.
- f. If you want to assign a color to the company, click the Select Color button, and then select a color. This color appears in a border around Sage 300 screens when you sign in to this company, making it easier to see which company's information you are viewing and avoid data entry errors.
- g. Click OK.

- 9. Click Exit to close Database Setup.

Setting Global Security Options

The Sage 300 System Administrator can set advanced global security options, such as the length of passwords and how often they should change.

The options you set affect both company and system databases.

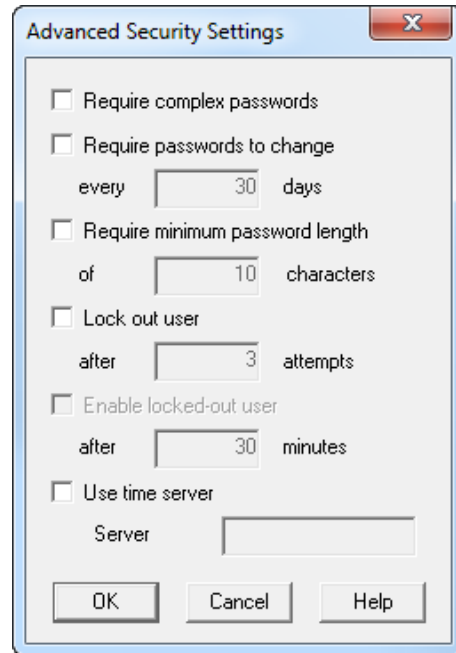
To set global security options:

1. If Database Setup is not already running, On Windows' Start menu, select Programs > Sage 300 > Database Setup.
2. Sign in as ADMIN, and then click OK to open the Database Setup form.

The Database Setup form lists the system and company databases that have been created.

3. Click the Security button.

The Advanced Security Settings form appears:

The image shows a Windows-style dialog box titled "Advanced Security Settings" with a close button (X) in the top right corner. The dialog contains several security options, each with an unchecked checkbox. The options are: "Require complex passwords", "Require passwords to change" (with a sub-option "every" set to "30" and "days"), "Require minimum password length" (with a sub-option "of" set to "10" and "characters"), "Lock out user" (with a sub-option "after" set to "3" and "attempts"), "Enable locked-out user" (with a sub-option "after" set to "30" and "minutes"), and "Use time server" (with a sub-option "Server" and an empty text field). At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

4. Select the following options as needed.

Important!

Selections will apply to *all* Sage 300 databases listed on the Database Setup form.

If application security is not turned on for your system database, or if it is turned on but no password is required, the password settings on the Advanced Security Settings form have no effect.

Require complex passwords. If a user enters a password that does not include both letters and numbers, a "Password change is required" message appears. When the user clicks OK, the Change Password form opens.

Require passwords to change every [] days. Requires users to change their passwords after a specified number of days. Enter a value from 1 to 999.

Expired passwords

If a password expires, users will receive a message that it has expired, and the Change Password form will open.

Require minimum password length of [] characters. Requires users to create passwords of a set length. Enter a value between 4 and 64 characters. If users enter a shorter password, they will receive the message, "Password change is required." When they click OK, the Change Password form opens.

Lock out user after [] attempts. Enter the number of times a user can enter an invalid password before they are locked out of the system. When a user is locked out, they can wait for the lockout period to expire before attempting to log in again, or the System Administrator can clear the option, allowing the user to attempt to log in again.

Enable locked-out user after [] minutes. Enter the number of minutes between 1 and 30,000 in which a locked-out user can retry their password.

Use time server. Synchronize your workstation's time with a specified server.

Note: If you restrict the hours a user can sign in to Sage 300, it is important to use a time server to maintain this security.

5. Click OK to save your changes and return to the Database Setup form.
6. Click Exit to close Database Setup.

Where To Now?

You can now sign on to your new company, create the company profile, and activate your data for the current version.

For information about activating your data, see Chapter 4, "Activating Sage 300."

If you set up a portal database (recall that you must use Microsoft SQL Server — Express or full Edition, to create your portal database), you need to configure it, as described in Chapter 5, "Configuring Sage 300 Web Screens."

Chapter 4

Activating Sage 300

Before you can use a new company or a new accounting application, you must prepare your database for use with Sage 300. This process is called activation.

This chapter describes activation and gives instructions for:

- Signing on to a new company.
- Creating the company profile.
- Activating your data for new accounting programs.

If you are upgrading from an earlier version...

If you are upgrading from an earlier version of Sage 300, you should refer to the Sage 300 Upgrade Guide, which provides specific instructions for installing programs and activating data for existing Sage 300 systems. You may need to perform additional procedures in a certain sequence when upgrading from previous versions. Also, when you are upgrading, you don't need to perform some of the steps that are required for new installations.

Set up system and company databases, first

You must create system and company databases using your database software before you can set up the databases for use with Sage 300. The instructions in this chapter assume that you have created a system database and a company database for the database engine you are using with Sage 300. For information on setting up databases, see Chapter 3, "Database Setup."

Before You Begin

When you start Sage 300 with a new company database, you will need to specify:

Number of periods in the fiscal calendar

- The number of fiscal periods your company uses.

Decide whether to use 12 or 13 periods in your fiscal year.

If you use 13 periods, decide which quarter will contain four fiscal periods.

Functional currency

- Your company's functional currency — that is, the currency in which your company keeps its books.

The functional currency applies to all Sage 300 applications for the company (such as Accounts Receivable, Accounts Payable, and Payroll).

If you use multicurrency accounting, you must also specify:

Default rate type

- A default exchange rate type (for example, monthly average rate or daily spot rate).

Determine the rate type your company uses most often to convert amounts entered in another currency to the functional currency

- Your reporting currency, if the euro is your functional currency, and you want to produce reports in both euro and your national currency.

You must use the Sage 300 Desktop to activate programs

Note: You must use the Desktop to activate all Sage 300 programs. You cannot activate programs in the Sage 300 web screens.

Signing On to a New Company

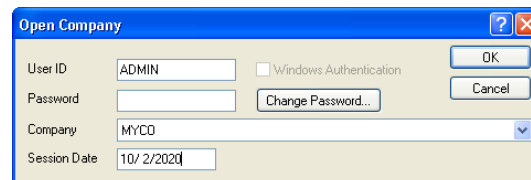
New company

When you sign on to a company, Sage 300 checks whether Administrative Services and Common Services for the company are activated.

- If this is the first time you are using a new system database, Sage 300 prompts you to activate Administrative Services. The activation process creates currency and security tables, installs standard currency codes and rate types, and places the Administrative Services icon on the Sage 300 desktop.
- The first time you open a new company, Sage 300 prompts you to activate Common Services. When you activate Common Services, the program creates tables to store company-wide information, displays the Company Profile, and places the Common Services icon on the Sage 300 desktop.

To sign on to a new company:

1. From the Windows Start menu, select All Programs > Sage 300 > Sage 300. The Open Company form appears.



Sign on with the
ADMIN user ID

2. In the User ID field, type **ADMIN**. This is the ID for the system administrator, the only person authorized to set up a new company.
3. If you selected the option Enable Application Security when you set up the system database, enter the system administrator's password.

Company

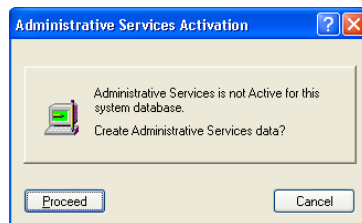
4. From the Company list, select the name of the new company.

The list contains the names of all company databases you created for Sage 300, as well as the names of sample companies, if you installed sample data.

Session date

5. In the Session Date field, type the date of your work session (or accept the default). This date will be the default Fiscal Year Starting Date when you activate Common Services for the company.

If the system database is being used for the first time, the following form appears:



6. Click Proceed to activate Administrative Services for the system database.

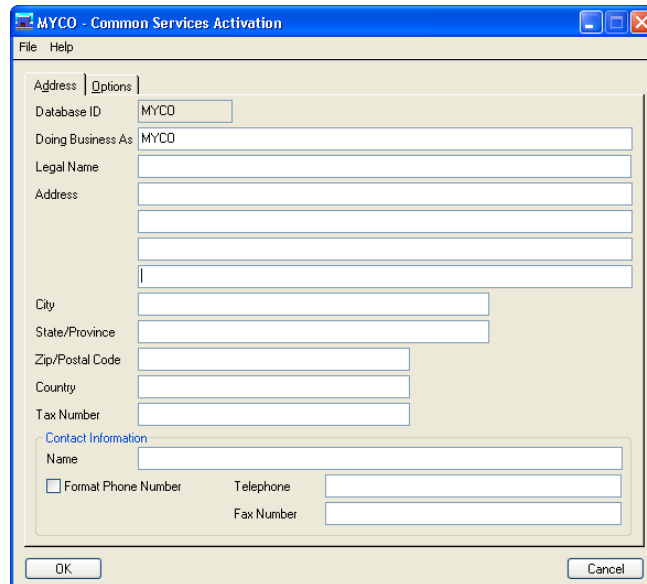
The program displays messages showing that data is being activated.

Once Administrative Services has been created and initialized, the program prompts you to enter the company's fiscal year starting date and proceed to activate Common Services, as shown here:



7. Type the starting date of your company's current fiscal year in the Fiscal Year Starting Date field, if it is different than the default date. Sage 300 creates this fiscal year in your company calendar.
8. Click Proceed to activate Common Services for the company database. Messages appear showing that tables are being created.

9. After Common Services has been created and initialized, the Common Services Activation form appears, as follows:



The options on the Common Services Activation form belong to your Company Profile. Follow the instructions in the next section to complete the company profile.

If you click Cancel, you return to the Open Company form. When you next start Sage 300 for this company, you are asked to activate Common Services.

10. When you are satisfied with the company profile information, click OK.

Sage 300 places icons for Administrative Services and Common Services on the company desktop.

Creating the Company Profile

This section describes the company profile information you enter when you open a new company, such as the address and options for all the Sage 300 applications used by your company. The Common Services Activation form includes the following tabs:

- **Address.** Displays the database ID and the name of the company you selected when you signed on. It includes fields for the address, telephone and fax numbers, and contact name.
- **Options.** Contains fields for company-wide settings, such as the number of fiscal periods in your fiscal year, and whether you use multicurrency accounting.

Entering Company Information

You can change defaulted contact information in subledgers

1. Fill in the fields on the Address tab, as follows:

The address information you enter on this page also appears as the default in the Options form for each accounting application. You can change the contact, phone number, or fax number to identify a person or position in the company for whom you are creating a specific ledger system.

Doing Business As. Type the company's name, exactly as you want it to be on all reports, financial statements, customer statements, and invoices. You can use up to 60 characters, including letters, digits, symbols, and punctuation. The default entry is the description from Database Setup.

Legal Name. Type the company's legal name, if it is different from the business name.

Address. Type the company's address.

City. Type the name of the city where the company is located.

State/Province. Type the name of the state or province where the company is located.

Zip/Postal Code. Type the company's zip or postal code.

Country. Type the name of the country where the company is located.

Contact. Type the name of a general contact person or position in the company.

Format Phone Number. Select this option if the company's phone and fax numbers are 10 digits long and are formatted with standard parentheses and hyphens, for example (555) 982-9800. Don't select the option if you use longer phone and fax numbers, or you need additional punctuation.

Telephone / Fax Number. Type the company's telephone and fax numbers.

Except for the database ID, you can change any of the entries on this tab at any time.

2. Fill in the fields on the Options tab, as follows:

Number of Fiscal Periods. In most cases, you select 12 periods if your fiscal year is divided into calendar months, and 13 if your fiscal year is divided into four-week periods.

Changing fiscal periods later not recommended

IMPORTANT: If you change the number of fiscal periods, later, you will not be able to compare amounts between years that have different numbers of fiscal periods.

Editing fiscal periods

The number of fiscal periods you select determines the lengths of the default periods on the fiscal calendar. If your fiscal periods vary in length, or if you have a 12-period fiscal year, which does not start on the first day of the month, you need to edit the dates in the Fiscal Calendar form after you create the company profile.

Quarter with 4 Periods. If you use a 13-period ledger, select the quarter that contains four fiscal periods, rather than three. Note that you can change this quarter later, although if you do, your previously printed reports may not be consistent with data printed after the change.

Locked Fiscal Period. Select None, Warning, or Error from the list. If you select Error, subledgers and Bank Services prohibit transactions from being entered or posted to a period that is locked.

Note: This option does not affect posting in General Ledger. If a fiscal period is locked for General Ledger, users can't post transactions to that period, regardless of your selection for option.

Warning Date Range. If you want to be warned when you enter a date for a transaction that is more than a specified number of days before or after the session date, type the number of days. If you want to be warned less often, type a large number (up to three characters).

Inactive G/L Account. Select None, Warning, or Error from the list. If you select Error, subledgers and Bank Services prohibit entries to a General Ledger account that has been flagged as Inactive.

Non-existent G/L Account. Select None, Warning, or Error from the list. If you select Error, subledgers and Bank Services prohibit entries to an account number that does not exist.

Value Added Tax

Location Type and Location Code. This information is used in countries, such as the United Kingdom, where a Value Added Tax (VAT) is calculated and reported. If your company reports VAT, type a six-character code for location type and up to 30 characters for the location code.

Country Code and Branch. You can type six-character codes for country and branch.



Multicurrency ledgers

Multicurrency. Select this option if you will enter, retrieve, import, post, and report transactions in more than one currency.

You cannot change multicurrency

Note: If you don't select the multicurrency option during Common Services activation, you can select it later. However, *once you select the multicurrency option and save the company profile you cannot change the option.*

Functional Currency. Whether you use multicurrency or not, you must enter a functional currency.

To select from the list of supplied codes, click the Finder beside the Functional Currency field, then double-click the code for your currency.

If your company maintains its books in the currency of a participating country of the European Monetary Union (EMU), you must select EUR as your functional currency code.

If the code for your functional currency is not in the list, click the New icon beside the Finder, and then enter the international code for your currency.

You cannot change the functional currency

Note: You cannot change the functional currency code after you save the company profile.

3. If you selected the Multicurrency option, fill in the following fields that appear on the Options tab:

Default Rate Type

Default Rate Type. If you use multicurrency accounting, you must select one of the rate types supplied with Sage 300, or add a new one.

To view a list of defined rate types, click the Finder beside the Default Rate Type field, then double-click a rate type from the list.

Gain/Loss Accounting Method. When you select the Multicurrency option, you must also choose one of the following currency translation methods:

- **Realized and Unrealized Gain/Loss.** Exchange gains and losses resulting from fluctuating exchange rates are unrealized until transactions are settled. Outstanding balances in foreign currencies must be revalued at each balance sheet date at current rates. The resulting gains and losses are considered temporary, so they are not included in net income. Unrealized gains and losses are reversed in the next period.
- **Recognized Gain/Loss.** Exchange gains and losses are recognized when foreign currency monetary items are revalued or settled. These gains and losses are taken into income and appear on income statements for the current period.

Euro option

Euro. Select the Euro option if your functional currency is the euro, but your company wants to produce reports in the national currency of a member country of the EMU.

Reporting currency

Reporting Currency. If you selected the Euro option, you must enter a currency code in this field. Reports will print in both the reporting currency and the euro.

4. When you are satisfied with the company profile information, click OK.

Sage 300 places icons for Administrative Services and Common Services on the company desktop.

5. If you have not registered System Manager, the Unregistered Applications warning appears.

- a. Click OK to close the warning message.

The Licenses form appears.

- b. Click the License Manager button, and then enter the required serial numbers, activation codes, and expiry dates (if applicable) on the licenses tab of the License Manager form.

If you don't have activation codes for the unregistered programs, click OK, and use the temporary licenses for the 30-day grace period.

You can now activate your accounting applications, following the instructions in the next sections.

Activating Your Data

To activate Sage 300 applications:

1. In the Administrative Services folder, double-click the Data Activation icon.

2. When asked whether you are ready to proceed with activation, click Yes.

A Data Activation form appears, listing applications that you can activate.

3. Select the check box beside each application for which you want to activate data.

The activation program automatically selects any applications that must be activated first, and then checks your data to ensure that it can activate them.

Most Sage 300 applications are interdependent. If you clear the selection for an application that others require, the activation program also clears the selection for the dependent applications. For example, if you clear the selection for Accounts Payable, but Purchase Orders and Project and Job Costing are selected, the program also clears the selections for Purchase Orders and Project and Job Costing. (For information about dependencies, see "Installing Sage 300" in Chapter 2.)

Note: Sage 300 Options products are not part of the multi-application data activation. If you select Sales Analysis, Ops Inquiry, or a number change program, you are prompted to activate that program immediately.

4. If the program displays a message saying that you cannot activate an application at this time:
 - a. Close the Data Activation form.
 - b. Correct the problems described in the error message.
 - c. Reopen the Data Activation form, and continue the process.
5. When you have finished selecting applications and entering required information, click the Activate button.

The following form appears, showing the settings that will be used for any options that are required to activate a program:

App / Version	Parameter	Value
Canadian Payroll 6.1A	Payroll Currency	CAD
General Ledger 6.1A	Oldest Fiscal Year Start Date	09/12/2011
General Ledger 6.1A	Current Fiscal Year	2011

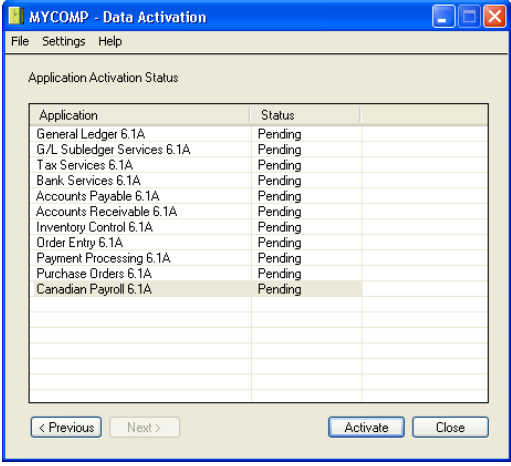
If you want to change any of the settings, double-click in the Value column for the program, and enter the correct value.

If you are unsure about a setting, and prefer not to activate the program at this time:

- a. Click the Previous button.

- b. Clear the check box for the program on the previous screen.
 - c. Click Next when you are ready to proceed.
6. To continue with the activation process, click Next.

The following form appears, showing you the status of the applications you selected for activation:



The screenshot shows a window titled "MYCOMP - Data Activation" with a menu bar (File, Settings, Help). The main area is titled "Application Activation Status" and contains a table with two columns: "Application" and "Status". The table lists 14 applications, all with a status of "Pending". At the bottom of the window are four buttons: "< Previous", "Next >", "Activate", and "Close".

Application	Status
General Ledger 6.1A	Pending
G/L Subledger Services 6.1A	Pending
Tax Services 6.1A	Pending
Bank Services 6.1A	Pending
Accounts Payable 6.1A	Pending
Accounts Receivable 6.1A	Pending
Inventory Control 6.1A	Pending
Order Entry 6.1A	Pending
Payment Processing 6.1A	Pending
Purchase Orders 6.1A	Pending
Canadian Payroll 6.1A	Pending

7. Click Activate.

Depending on the number of applications you are activating, the process can take several minutes. The program displays a progress bar indicating the stage of completion, and updates the status of each activated program on the Data Activation form.

8. When Activation has finished, click Close.

Change the Administrator's Password

Sage 300 ships with a default password for the ADMIN user, allowing you to install and activate programs, and set up your databases.

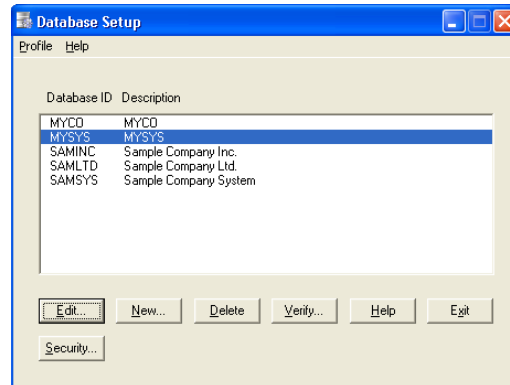
Once you finish activating Sage 300 programs, we recommend that you change the password for the ADMIN user to prevent unauthorized access to your company data.

To restrict user access by password, you must first enable security for the system database, if you have not already done so.

To enable security for the system database:

1. On the Windows Start menu, select All Programs > Sage 300 > Database Setup.
2. In the Sign-On form that appears, type **ADMIN** for the password, and then click OK.

The Database Setup form appears:



3. In the Database Setup form, select the system database, and then click Edit to display the Database Profile.
4. Select Enable Application Security, and then click OK.
5. Click Exit to close Database Setup.

Change the ADMIN Password

You can change the ADMIN password from the Open Company dialog box by entering the ADMIN user ID, then clicking the Change Password button. (The button is available only if your system database uses security.)

You can also change the password in the ADMIN user's record once you open the company:

1. From the Administrative Services folder, click the Users icon.
2. Type the new password in the Password field, and then type it again in the Verify field.
3. Click Save, and then click Close.

Where To Now?

You can now:

- Configure the Sage 300 web screens.

For information on configuring the web screens, see Chapter 5, "Configuring Sage 300 Web Screens."

- Add users and set up security groups.

For information on adding users and setting up security groups, see Chapter 6, "Performing Administrative Tasks."

- Set up accounting applications for your company.

For guidance, refer to the help when setting up each application.

Chapter 5

Configuring Sage 300 Web Screens

Sage 300 web screens are modernized versions of the classic Sage 300 desktop screens, which you use in a web browser. Web screens and desktop screens run in parallel.

Important! When using Sage 300 web screens over an external network or the internet, data must be protected with security measures such as Secure Socket Layer (SSL) or a Virtual Private Network (VPN). To determine appropriate security measures, consult with your information technology (IT) professional or Sage Business Partner.

This chapter provides an overview of installing and configuring the Sage 300 web screens. It also provides steps for:

- Configuring the portal database, which is required for web screens.
- Adjusting certain settings configured during installation.

Overview

Before you can use Sage 300 web screens, you must:

1. Install the current version of Sage 300, including the web screens. For details, see Chapter 2, "Installing Sage 300 Programs."
2. Activate your company data for the Sage 300 programs you use.
3. Create a portal database, which stores files used by the Sage 300 web screens. Normally, you create this database on the same server as your Sage 300 data. For information about creating databases, see Chapter 3, "Database Setup."

If you create the portal database using SQL Server Express, you will need to configure a TCP/IP connection manually in that program. For more information, see, "Configuring a Microsoft SQL Server Express Database," later in this chapter.

4. Configure the Sage 300 web screens, as described in this chapter.

Configuring Security for Web Screens

This section outlines some security precautions you should take if you are setting up web screens to be accessible from the Internet.

IMPORTANT

This section is not a comprehensive discussion of security. Make sure you also consult any documentation you have regarding security for your specific system (in particular, the documentation for your version of IIS). If you have any concerns about security, contact your Sage business partner or IT professional.

At a minimum, you should take the following security precautions:

IIS:

- Configure the web screens to use HTTPS:
 - a. Purchase an SSL certificate from a reputable supplier.
 - b. Turn on HTTPS by adding an HTTPS binding (in the binding you will specify your SSL certificate).
 - c. Turn off HTTP by selecting the Require SSL option.

Note: When you turn on HTTPS, all URLs for web screens are changed to begin with https instead of http. This invalidates any existing links to web screens.

- Disable or remove the default IIS file from the web server.
- Remove sensitive information from HTTP Response Headers. At a minimum, install the URL Rewrite module and add a rule to remove server information from all responses.
- Disable any encryption algorithms with a symmetric key shorter than 128 bits.
- Disable weak SSL Cipher Suites from publishing on the internet for all external systems.
- Disable insecure HTTP methods (at minimum, TRACE).
- Disable Directory Browsing for all virtual directories.

Passwords:

Use Advanced Security Settings in Sage 300 to enforce a strong password policy:

- Require complex passwords (passwords that must include letters and digits).

- Specify a length of time after which users must change their passwords.
- Require a minimum password length of at least 8 characters.
- Lock out users after multiple failed login attempts.

Other:

- Secure Sage 300 databases.
- Secure shared folders.
- Run Windows Update.
- Turn off services you don't need.
- Use a firewall.

Configuring the Portal Database

Before you can configure the web screens, you must create and then configure a portal database. For information about creating databases, see Chapter 3, "Database Setup."

Note: The portal database is shared by all companies in a Sage 300 installation, so you need to configure only one portal database.

To configure the portal database:

1. From the Windows Start menu, select **All Programs > Sage 300 > Database Setup**.
2. On the Sign-On form that appears, enter the ADMIN password.
3. On the Database Setup form that appears, click **Portal**.
4. On the Configure Portal form that appears, enter the following information:
 - **Database Format.** Microsoft SQL Server is the only database engine you can use to create your portal database.
 - **Server Name.** By default, this is set to "localhost" to use the current machine. If you created your portal database on a different (remote) machine, enter the name of that machine.

Note: If multiple instances of Microsoft SQL Server are installed on the same machine, you can specify an instance by entering the server name in the format *servername/instancename*.

- **Server Port.** Enter the TCP/IP port number specified in your database software for your portal database. The default port number is 1433.
- **Database ID.** Enter the name specified for the portal database in your database software.
- **Login ID and Password.** Enter the ID and password specified for your database administrator in your database software. (They are not the credentials for the Sage 300 ADMIN User.)

Note: You must supply credentials for SQL authentication. The portal database does not support Windows authentication.

5. Click **OK**, and then click **Exit** to close the Database Setup form.

If you set up the portal database using SQL Server Express, follow the steps in the next section, "Configuring a Microsoft SQL Server Express Database."

Configuring a Microsoft SQL Server Express Database

The following instructions apply only to Microsoft SQL Server Express.

In SQL Server Express, the default TCP/IP connections settings are disabled. Because the portal database requires a TCP/IP connection, you must set one up manually, as follows:

1. Launch the SQL Server Configuration Manager.
2. Under the SQL Server Network Configuration tree, click **Protocols For SQLEXPRESS**.
3. Enable the TCP/IP protocol. (The default setting is Disabled.)
4. Right-click the **TCP/IP** protocol, and then click **Properties**.
5. On the IP Addresses tab, in the IPAll Section:
 - a. Clear the **TCP Dynamic Ports** field.
 - b. Set the TCP Port to **1433**.
6. Restart the SQL Server.

Testing the TCP/IP Connection

To test that TCP/IP works, from the command line, type:

telnet localhost 1433

If the TCP/IP connection is set up correctly, the screen will clear, and you will be in a Telnet session with the SQL Server.

Configuring English Windows to Display Chinese

If you work with Chinese language packs and the portal machine uses English Windows, you must configure Windows to display Chinese properly.

To configure English Windows to display Chinese:

1. On the machine where the portal database is installed, click **Start > Search Programs And Files**, and then type **intl.cpl**.
2. On the Regional And Language screen, select the **Formats** tab.
3. For the Format option, select **Chinese (Simplified, PRC)**, if it is not already selected, and then click **Apply**.

Alternatively, you can select **Chinese (Traditional, Taiwan)** or **Chinese (Traditional, Hong Kong S.A.R.)** for Traditional Chinese.

4. Click the **Administrative** tab, and then:
 - a. Click **Copy Settings**.
 - b. For the Copy Your Current Settings To option, select **Welcome Screen And System Accounts**.
 - c. Click **OK**.
 - d. Click **Change system locale**.
 - e. For the current system locale, select **Chinese (Simplified, PRC)**, if it is not already selected.
 - f. Click **OK**.
5. When prompted to restart the machine, click **Restart now**.

Setting Up a User Account for IIS and Windows Services

By default, the Sage 300 application pool in IIS and the Sage.CNA.WindowsService Windows service run under the Local System account. To simplify service management, improve security, and support consistent handling of regional settings and content in Sage 300 web screens, we recommend you set up a Windows user account and modify the application pool and Windows service to run under that user account.

The user account must have access to the Sage 300 shared data folder and customization directory. Also note that the account's regional settings determine the language in which some content appears in Sage 300.

Starting the Sage 300 Web Screens

Once you have configured the Sage 300 web screens as described in this chapter, they are ready to use.

To open web screens in a browser:

1. Visit `http://servername/sage300`, where *servername* is the server name or IP address of the server where Sage 300 is installed.
2. Enter your username and password.
3. Select a company.
4. Click **Sign In**.

Chapter 6

Performing Administrative Tasks

The procedures in this chapter are relevant to all Sage 300 configurations.

Perform these procedures at any time after you have installed Sage 300 programs. Sign on as the ADMIN user at any server or workstation that runs Sage 300.

This chapter describes how to:

- Create user records
- Set up optional security groups
- Assign user authorizations

Add Users

For each user, assign an ID and set up individual security options.

1. In the Administrative Services folder, double-click the Users icon.
2. In the User ID field, use up to eight characters to type a unique code to identify this user (letters from A to Z and digits from 0 to 9). The ID must start with a letter, not a number.



New button

If the ID field is not blank, click the New button to start a new record.

When security is turned on for the system database, the User ID determines user's access rights in Sage 300.

3. In the User Name field, type a name for this user.
4. In the Account Type field, select User or Timecard.

Note: If you select Timecard, you must create a security group for employees who only enter timecards, later.

5. Select the language in which to display and print this user's messages, Help, reports, and forms.

Note: If you use Sage 300 web screens, users may need to select this language in their web browser settings as the preferred language for viewing web pages.

6. In the Authentication Method field, select one of the following options that determines how this user will sign on to Sage 300:

Sage 300 — allows the user to sign on using only their Sage 300 User ID.

Windows — allows the user to sign on using their Windows User ID.

Both — allows the user to sign on using either their Windows User ID or their Sage 300 User ID.

7. In the Job Role field, select the role that most resembles this user's job role. If you leave this field blank, the user is prompted to select a role when they sign in to Sage 300.
8. If you chose Windows or Both as the authentication method, enter a Windows Domain name and the Windows User Name for this user in the fields provided.

You can click the Browse button to select from a list of Windows users and domains.

If you selected Sage 300 as the authentication method, these fields are not available.

9. If you chose Sage 300 or Both as the authentication method, type a password in the Password field, and then type it again in the Verify field.

The password can use between 4 and 64 characters (letters from A to Z and digits from 0 to 9), but it must start with a letter.

When you type a password, Sage 300 displays asterisks. You must enter a password in each user record. However, if security is not turned on for the system database that the company uses, users are not asked for the password when they start Sage 300.

Note: Users *must* use a password to open Sage 300 using their browsers.

10. Assign additional security to the password, selecting from the following options:

User Must Change Password At Next Logon — forces the user to change their password the next time they sign on to Sage 300. This option is not available if you selected Windows as the authentication method.

User Cannot Change Password — prevents a user from changing their password. This option is not available if you selected Windows as the authentication method.

Password Never Expires — allows the same password to be used without requiring a change. This option is not available if you selected Windows as the authentication method.

Account Is Disabled — prevents a user from signing on.

Account Is Restricted — restricts the user to signing on to Sage 300 only during the valid times that you specify.

Account Is Locked Out — locks out the user after they exceed the maximum number of attempts specified in the advanced security settings for the system database. The system assigns this status, and, depending on the security settings, can clear this status after a certain period. The ADMIN user can also clear this status.

This option is not available if you selected Windows as the authentication method.

11. If you selected the option to restrict the user's account, in the Valid Times section, specify the days of the week and the hours that the user can sign on to Sage 300.
12. In the Contact Information section, enter e-mail addresses and a phone number for this user.
13. Select the **User receives e-mail from Sage with information relevant to job role** option to indicate that this user consents to receive e-mail from Sage.

Note: If this option is selected, you must enter information in the **Job Role** and **E-mail 1** fields.

14. Click Add to save each new user record.

Using Windows as the Authentication Method

If you select Windows as the authentication method for a user, the user must sign on to Sage 300 with a valid Windows user ID.

Normally, when a user signs on to Windows with their user name, domain, and password, the server uses this information to authenticate the user. If the user then signs on to Sage 300 with the same ID and domain, they do not need to provide a password.

Note: The administrator must first map the Windows password to the Sage 300 user ID. (See Windows' documentation for instructions.)

The following fields are not available in the User record when you select Windows as the authentication method:

- Password and Verify
- User Must Change Password At Next Logon
- Password Never Expires
- User Cannot Change Password

If you are changing the authentication method for an existing user, any previously assigned passwords are cleared, and therefore no longer valid.

Signing On to Sage 300 with Windows Authentication

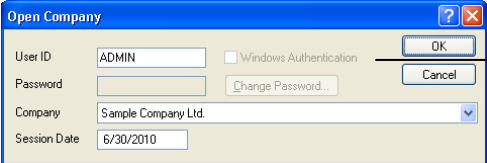
Changes to the
Open Company
dialog box

To allow Windows authentication, the Open Company dialog box includes:

- A Windows Authentication check box.
- A field for the Windows Domain name. (This field appears only if the particular user's record specifies Windows authentication.)

If the Sage 300 authentication method is assigned to *all users*, the Open Company dialog box displays the Windows Authentication check box, but it is not available to any users, including the ADMIN user, from the Sage 300 desktop.

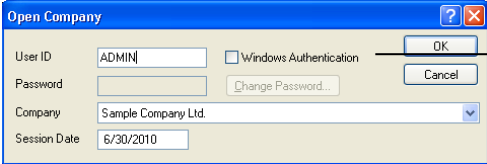
Sage 300
Authentication
Method

The 'Open Company' dialog box is shown with the 'Windows Authentication' checkbox unchecked. The 'User ID' field contains 'ADMIN', 'Password' is empty, 'Company' is 'Sample Company Ltd.', and 'Session Date' is '6/30/2010'. The 'OK' and 'Cancel' buttons are visible.

Option disabled

If the Windows or the Both authentication methods are assigned to *any* user, the Windows Authentication option is available, but not selected, for all users, as shown here:

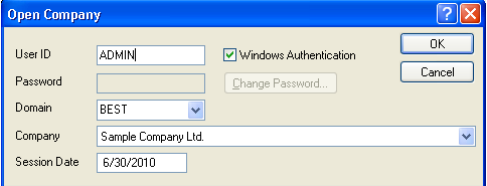
Windows / Both
Authentication
Methods

The 'Open Company' dialog box is shown with the 'Windows Authentication' checkbox checked. The 'User ID' field contains 'ADMIN', 'Password' is empty, 'Company' is 'Sample Company Ltd.', and 'Session Date' is '6/30/2010'. The 'OK' and 'Cancel' buttons are visible.

Option enabled

When a user selects the Windows Authentication option, the Domain field appears, as follows:

Windows
Authentication
option selected,
Domain field
displayed

The 'Open Company' dialog box is shown with the 'Windows Authentication' checkbox checked. The 'Domain' field now appears and contains 'BEST'. The 'User ID' field contains 'ADMIN', 'Password' is empty, 'Company' is 'Sample Company Ltd.', and 'Session Date' is '6/30/2010'. The 'OK' and 'Cancel' buttons are visible.

By default, the Domain and User ID fields display the domain and user ID for the currently logged-in Windows user, if their Sage 300 User ID has been mapped to a Windows user account.

Password fields disabled

The Password field and the Change Password button are always disabled for Windows Authentication.

Signing On to Sage 300 if “Both” is the Authentication Method

The Both authentication setting allows a user to sign on to Sage 300 using either their Sage 300 ID and password or their Windows User ID.

Set Up Security Groups and Assign User Authorizations

If the Security option is selected for a system database, access to Sage 300 is restricted by password for all companies that share the system database.

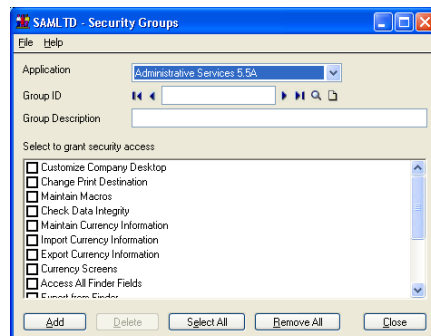
If security is turned on, or if some users have a Timecard account, users require authorization to perform tasks in each Sage 300 program. You provide this authorization by assigning users to security groups.

When you create security groups, you specify the tasks that each group can perform. All companies using the same system database share security groups.

Create Security Groups

You create security groups, as follows:

1. In the Administrative Services folder, double-click the Security Groups icon.



2. Select an application from the Application list.

3. Enter a unique group ID and a description.

The group ID can be up to eight characters (letters from A to Z and digits from 0 to 9).

4. Select the tasks the security group can perform.
 - To select every task in the list, click Select All.
 - To remove a task that has already been selected, click the check box to clear it.
 - To remove all tasks, click the Remove All button.
5. Click Add.
6. Repeat these steps for each application.

Now, you can assign users to these security groups, as described in the next section.

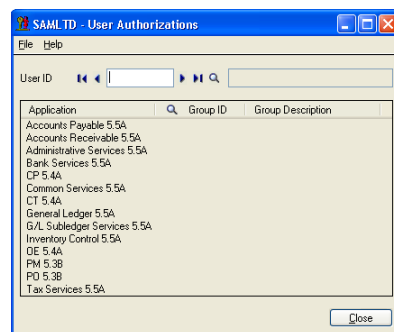
Authorizing Users

You assign each user to one security group for each application. All users in the same group can perform the tasks defined for the group. The same user can be assigned to different groups within the same company.

To assign user authorizations:

1. In the Administrative Services folder, double-click the User Authorizations icon.

The User Authorizations dialog box appears:



2. Select the User ID.

If a security group has been assigned to this user, it appears next to the Application name, in the Group ID column.

3. For each application to which you want to allow access for this user:
 - a. Double-click the Group ID field to display a Finder button.
 - b. Click the button to display security groups defined for the application.
 - c. Select a security group from the list.
4. Repeat steps 2 and 3 for each user.
5. When you have finished assigning security groups to all users, click Close.

Create and Assign UI Profiles for Customized User Interface Forms

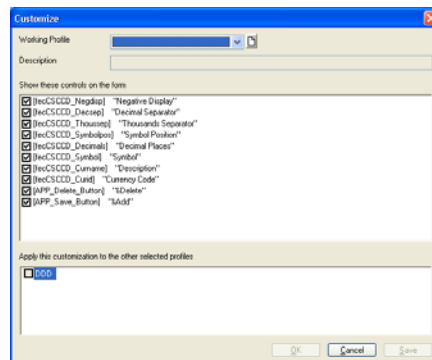
If your users do not need to use all fields in dialog boxes and forms, you can customize their user interfaces, hiding some fields.

To create a UI Profile ID:

1. Determine the fields a user will not need when using certain forms and dialog boxes.
2. Open Sage 300 as the ADMIN user.
3. Create your User IDs. (See previous sections for the steps.)
4. Open the form that you are customizing for a user. (In our following examples, we chose Currency Codes.)
5. Choose Customize from the File menu.

The Customize form for Currency Codes looks like this:

Field controls that
can be hidden



The Customize screen displays a list of the controls that can be hidden for the dialog box or form that you started from (for our example, the

Currency Codes dialog box). To hide some of these controls for users, you must either select an existing profile or create a new one. In the following steps, we explain how to create a new profile.

6. Click the New button beside the Working Profile field.

The following screen appears:

The screenshot shows a window titled "SAML TD - UI Profile Maintenance". It has a menu bar with "File" and "Help". Below the menu bar are two text input fields: "Profile ID" and "Profile Description". Underneath these fields is a table with three columns: "Screen", "Application", and "Control to Hide". The table is currently empty. At the bottom of the window are three buttons: "Add", "Delete", and "Close".

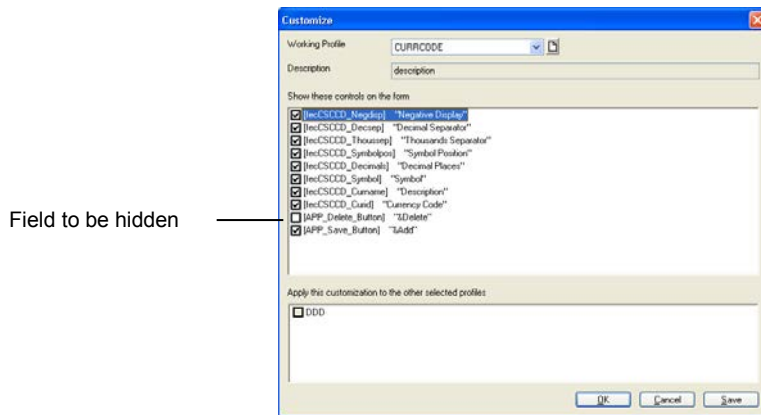
7. Enter a unique ID, using up to 20 characters, in the Profile ID field (for example, CURRCODE), and a description in the Profile Description field, then click Add, then click Close to return to the Customize form.

The Customize form will now look like this:

The screenshot shows a window titled "Customize". It has a "Working Profile" dropdown menu set to "CURRCODE". Below it is a "Description" text field. Underneath is a section titled "Show these controls on the form:" followed by a list of controls with checkboxes. The controls are:
- [x] [ResCSCD_NegDisp] "Negative Display"
- [x] [ResCSCD_Decimal] "Decimal Separator"
- [x] [ResCSCD_Thousands] "Thousands Separator"
- [x] [ResCSCD_SymbolPos] "Symbol Position"
- [x] [ResCSCD_DecimalPl] "Decimal Places"
- [x] [ResCSCD_Symbol] "Symbol"
- [x] [ResCSCD_Currency] "Currency"
- [x] [ResCSCD_CurrencyCode] "Currency Code"
- [x] [JAPP_Online_Button] "Online"
- [x] [JAPP_Save_Button] "Add"
Below this list is a section titled "Apply this customization to the other selected profiles:" with a checkbox labeled "DDD". At the bottom are three buttons: "OK", "Cancel", and "Save".

Because we have just created the first Working Profile, it is selected in the Working Profile field. We must now clear the controls that we do not want the user to see in the Currency Codes dialog box.

8. Click checkmarks beside the controls for the fields to hide. The checkmarks disappear, as shown next:



The field will be hidden when users assigned to the CURRCODE Working Profile open the Currency Codes dialog box.

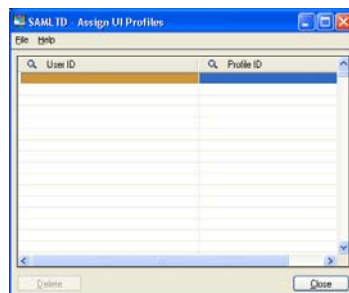
9. Click Save, then click OK to return to the dialog box you customized. (In our example, we return to Currency Codes.)
10. Click Close in the dialog box.

After creating a UI Profile ID, you assign users to it. You can create as many Profiles as you need, and assign each user to a different Profile. You can assign more than one user to each Profile ID.

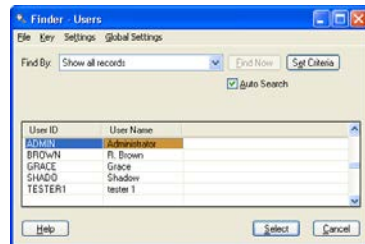
To assign Users to Profile IDs:

1. Double-click the Assign UI Profiles icon in the Administrative Services folder.

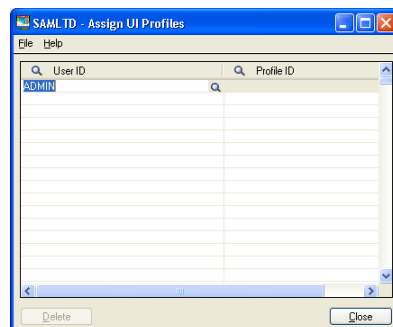
If you have not assigned any UI Profiles to users, the Assign UI Profiles form has no entries in the grid, as shown below:



2. Click the Finder in the User ID column, highlight a User ID from the list, and click Select.

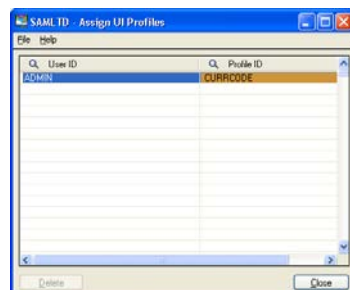


The Assign UI Profile form reappears, with the selected User ID displayed in the User ID column.



3. Click the Finder in the Profile ID column to choose a Profile from the list.

Our sample Assign UI Profiles form now displays the following:



Each time you open the Assign UI Profiles screen, the grid displays all User IDs and Profile IDs previously assigned.

4. Click Close to return to the Sage 300 desktop.

The next time the selected user opens the form that has been restricted, the fields hidden in the Working Profile will not appear.

Set Up Customization Directories

If a user or group needs to print customized Sage 300 reports, you should set up customization directories to store the customized reports.

Note that:

- Only the ADMIN user can create customization directories.
- SAP Crystal Reports® for Sage 300 is required to customize or create new reports.

Remove Sage 300 Programs

To remove Sage 300 programs:

1. In Windows' Control Panel, click Programs And Features.
2. Open Uninstall Or Change A Program, and then:
 - To remove all Sage 300 programs, double-click your Sage 300 version.
 - To remove individual Sage 300 programs:
 - i. Click your Sage 300 version, and then click Change. (Do not double-click.)
 - ii. Click Modify, and then use the Select Features screen to select the programs you want to install and clear the selections for programs you want to remove.

Chapter 7

Licensing Sage 300

This chapter describes Sage 300 licensing in general, and it explains how to:

- View or update license information for your Sage 300 installation.
- Enter activation codes for installed Sage 300 accounting programs.
- Enter activation codes for user LanPaks, and for Report Manager and Report Viewer for Sage 300 Intelligence Reporting.

Licensing Products and Users

Each Sage 300 product license allows a company to use a particular version of a Sage 300 program. You require a new license whenever you install a new Sage 300 program or upgrade to a new version.

During installation, the program creates temporary license files (with serial number "000000000000") for Sage 300 programs. These temporary licenses let you use Sage 300 for 30 days, while you wait for activation codes from Sage.

Until you enter activation codes, whenever you sign on to your company database, Sage 300 will display an *Unregistered Applications* message to remind you to register the programs.

Once you receive valid serial numbers and activation codes, you enter them in the License Manager to make the licenses permanent.

You require a
LanPak license to
use Sage 300

Installation *does not* generate temporary LanPak licenses, however. LanPak is Sage 300's user licensing system. Without a LanPak license, no one — including the ADMIN user — can sign on to a company.

Normally, you enter the activation code for your LanPak license as part of program installation. (When the installation program finishes, it displays the License Manager, where you enter the activation code for your LanPak on the Users tab.)

Note: You register a license for a particular company in combination with a product serial number. If your company changes its name (for example, after a merger), you need to update the licenses for all your Sage 300 products.

After you change the company name in the License Manager, the activation code will be marked Unauthorized. The license will remain valid, but you should apply for another activation code for the new company name.

The following sections describe LanPak licenses in more detail, and explain how to create a temporary LanPak license if you did not enter an activation code for a LanPak when you installed Sage 300.

LanPak Licenses

A LanPak license regulates how many users can work with a particular version of Sage 300. The number of LanPak licenses you require depends on the number of workstations on which you install Sage 300 and the number of users who will access company databases on those workstations.

- To use Sage 300 on a single computer, you must register a 1-user LanPak. (With this type of LanPak, you cannot work with two Sage 300 databases at the same time.)
- To add Sage 300 users to a network, you register multi-user LanPaks. You can obtain LanPak licenses for any number of users on a network.

Note: One LanPak is required for each user that opens a Sage 300 database from a workstation. A user can open multiple databases from the same workstation providing they use the same Windows user profile.

Creating a Temporary LanPak License

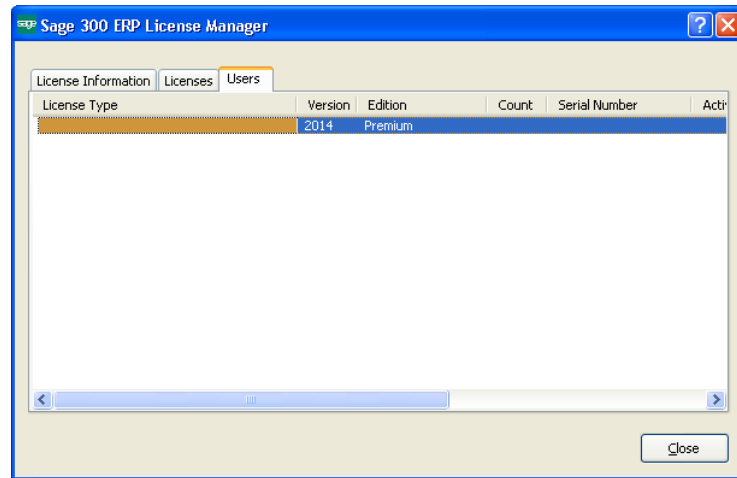
Before you can begin using Sage 300, you must register a LanPak license for a specific number of users. If you do not yet have an activation code for your LanPak license, you can create a temporary LanPak license that will allow you to begin using Sage 300.

To create a temporary LanPak license:

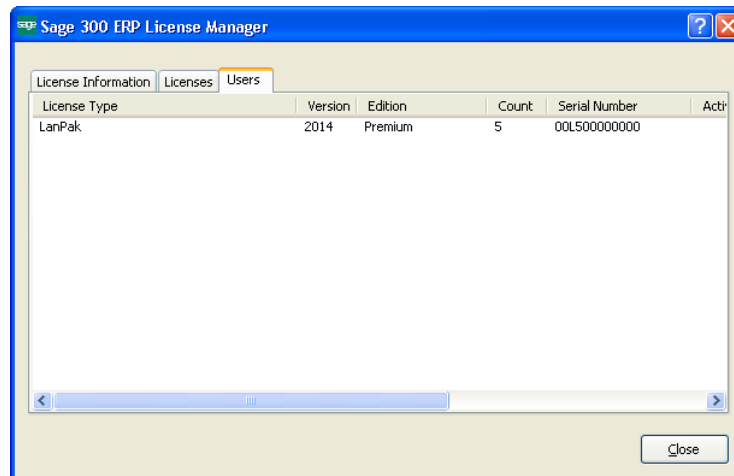
1. In the Licenses form, click License Manager.

2. Click the Users tab, and then click in the blank space to create a new line. (If there are existing lines, right-click in the blank space, and then click Insert.)

The Users tab should now appear as follows:



3. In the new line:
 - a. Click the License Type column, and then select LanPak from the list that appears.
 - b. Click the Count column, and then enter the number of users that require concurrent access to Sage 300.



4. Click Close, and then click OK.

You can now open the company.

Requesting Activation Codes

You need activation codes to use Sage 300 products, including upgrades. However, you can run Sage 300 for up to 30 days while you await your activation codes.

You can obtain activation codes from the Sage Customer or Partner Portal.

If you are a Sage customer:

1. Log in to your account at
<https://customers.sagenorthamerica.com/irj/portal/anonymous/login>.

If you don't have an account, use the self-registration tool on the Customer Portal login page to create one.

2. On the Support menu, click Self Service.
3. Click the My Products tab.
4. Follow the instructions on the My Products tab to display and print the Details Sheet.

If you need assistance with the Customer Portal, e-mail Customer.Portal@sage.com, or call 1-877-828-6372.

If you are a Sage partner:

1. Log in to your account at
<https://partners.sagenorthamerica.com/irj/portal>.

If you don't have an account, contact the portal administrator at your company, or contact Sage.

2. Click Customers > Details Sheet.
3. Click Show Advanced Search.
4. Enter an account ID, and then click Go.
5. On the Details Sheet, click the Products Details tab to view the customer's activation codes.

If you need assistance with the Partner Portal, e-mail Partner.Portal@sage.com, or call 1-877-828-6372.

Updating Your Sage 300 Licenses

You use the License Manager to:

- View license information for your Sage 300 programs, including the number of users authorized by the LanPak license.
- Enter serial numbers, activation codes, and expiry dates (if applicable) for the Sage 300 programs and services that your company is using.
- When necessary, change the company name to which your Sage 300 software is registered (for instance, after a merger).

The License Manager form appears during program installation, letting you enter serial numbers, activation codes, and expiry dates (if applicable) for any new Sage 300 programs and LanPaks that you are installing.

During installation, the program creates temporary license files (with serial number "000000000000") for Sage 300 Programs. If you have received valid serial numbers and activation codes, you enter them in the License Manager to make the licenses permanent.

You can also open the License Manager, later, if you need to add or change any licensing information. If you don't enter LanPak information during installation, for example, the program prompts you to enter it in the License Manager form.

To update product licenses or LanPaks:

1. From the Help menu on the Sage 300 desktop, click Licenses.
2. On the Licenses form that appears, click the License Manager button.
 - **To edit the client ID, Licensed To (person or entity), dealer, and CC (certified consultant or business partner),** click the License Information tab.

If you need to change the company name to which your Sage 300 software is registered, you click the Change button, and then type the new name in the Company field. When you next open the License Manager form, the company field will be disabled, unless you click Change again.

Note: Activation codes are effective for serial numbers and company names used together. After you change the company name, the activation code will be marked Unauthorized. The license will remain valid, but you should apply for another activation code for the new company name.

- **To enter activation codes for your Sage 300 products** (for example, to update a temporary license with a permanent one), click the Licenses tab.

You must enter the Serial Number and the Activation Code, in order, for each Sage 300 product you want to register:

- i. Click in the Serial Number column, and then type your serial number for the selected product.
- ii. Click in the Activation Code column, and then type the activation code for the product.
- iii. For subscription licenses, click in the Expiry Date column, and then type the expiry date.

Note: You require *permanent* licenses for the Analysis and Connector modules for Sage 300 Intelligence Reporting. No temporary licenses are available for these programs.

- **To enter activation codes for LanPak licenses, or to delete temporary licenses for databases that you do not use**, click the Users tab.

You must enter information for each LanPak user in this order:

- i. Click in the License Type column, and then select LanPak.
- ii. Click in the Count column, and then enter the number of users that require concurrent access to Sage 300.
- iii. Click in the Serial Number column, and then type your serial number for the selected product.
- iv. Click in the Activation Code column, and then type the activation code for the product.

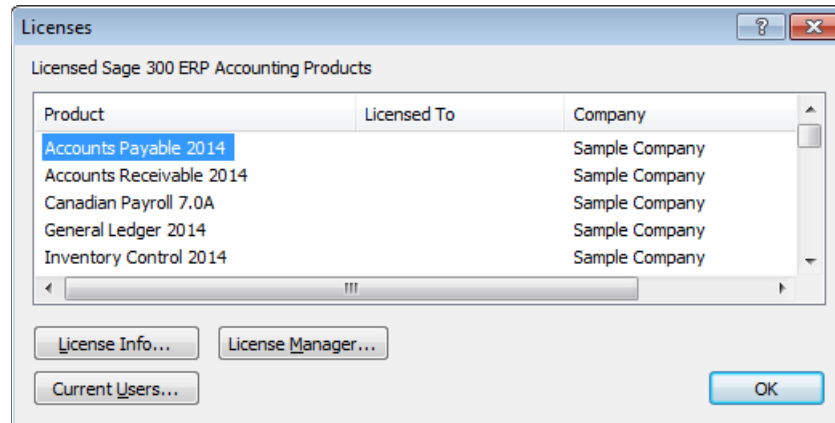
Note: You also use this tab to record activation codes for additional licenses for the Report Manager and the Report Viewer in single-user increments. (One Report Manager license — for one user — is free with Sage 300.)

3. When you have finished entering information, click Close to return to the Licenses form.
4. Click OK to return to the desktop.

Viewing License Information

You use the Licenses form to view Sage 300 licenses, as follows:

On the Sage 300 desktop, from the Help menu, click Licenses.



Viewing details for a single license

- To see information for a single license, select the product on the list, and then click the License Info button (or double-click the product name).

Viewing details for LanPak and IAP license use

- To see information about users currently signed in to Sage 300, including third-party products you are using that integrate with Sage 300, click the Current Users button.

Updating product or LanPak licenses

- To see details for all Sage 300 licenses and LanPaks, or to update licensing information, click the License Manager button.

Monitoring LanPak Activity

The Current Users screen lists all users currently signed in to Sage 300 with a LanPak or IAP license. It also displays information about user activity, such as a list of screens each user has open.

To open the Current Users screen, click Current Users on the Sage 300 desktop Help menu.