

Sage FRP Common Services

version 3.6 SP1 Hotfix 1

Setup Guide





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Installation Guidelines for FCS

Overview

This document presents Sage FRP Common Services installation.

Before updating Sage platform, you need to back up all your data.

Close all other applications before starting Sage FRP Common Services installation.

Using the Previous command during the installation process, is strongly discouraged. In case of error, cancel the whole installation and start over.

Specific Recommendations for Oracle

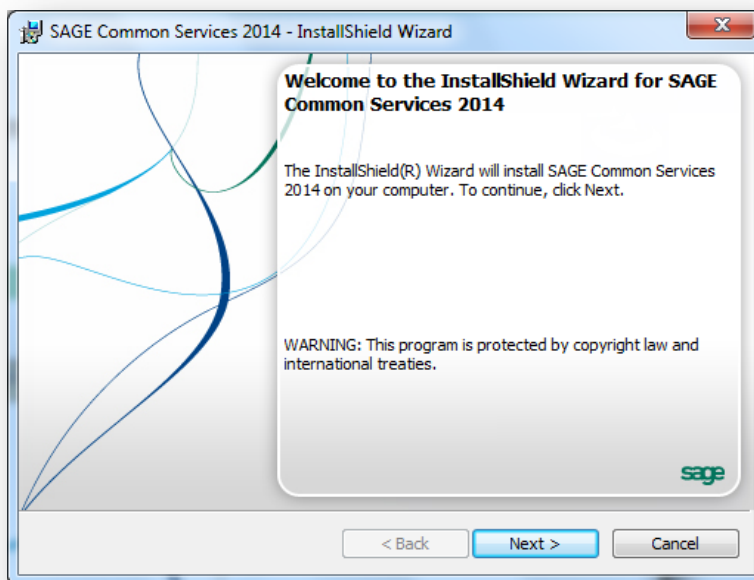
Sage applications are validated in Windows environments. If Oracle server runs under another operating system, please contact the client's database administrator.

Installing Sage FRP Common Services for the first time



Sage FRP Common Services must be installed prior to installing any other Sage programs. Make sure you remove any older version of Sage FRP Common Services.

1. Go to **Products\Common** in the provided DVD, and start the **setup** file.
The installation program starts and a progress window is displayed. Click **Cancel** at any time to abort the installation process.
2. Click **Next** in the **Sage Common Services Setup** window.

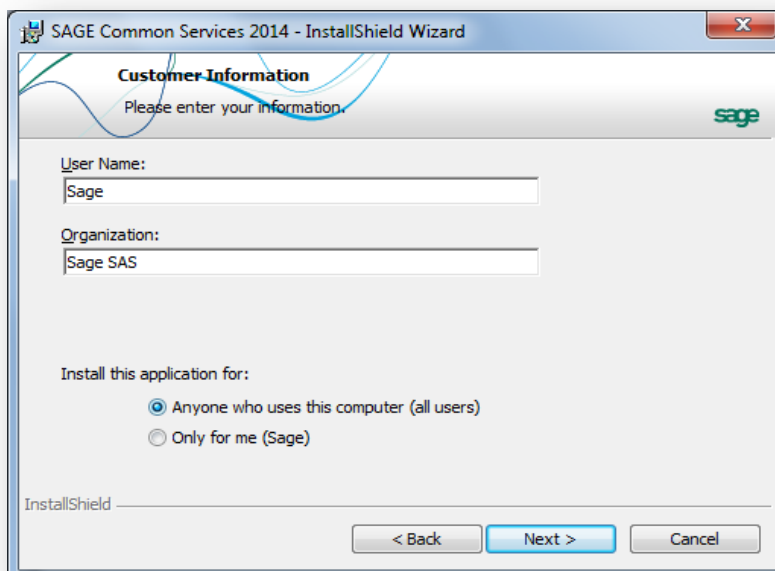


The **Select Shortcut Language** screen appears:



3. Select a language then click **Next**.

The **Customer Information** screen appears:



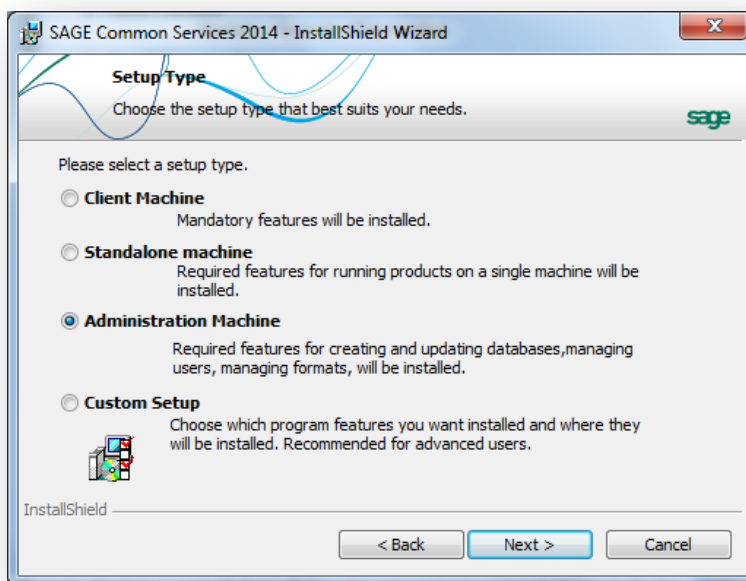
4. Enter your login name in the **User Name** field and the name of your company in the **Organization** field.

5. Select an accessibility option:

- The **Anyone who uses this computer (all users)** option allows any user of the station to access Sage FRP Common Services.
- The **Only for me (Sage)** option allows restricting access to Sage FRP Common Services to the user logged in when the product was installed.

6. Click **Next**.

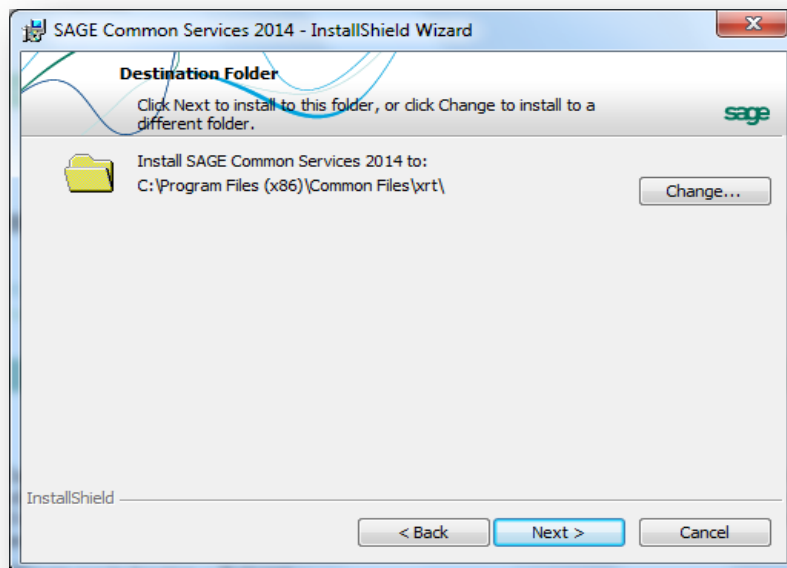
The **Setup Type** screen appears:



The following four types of installations are available:

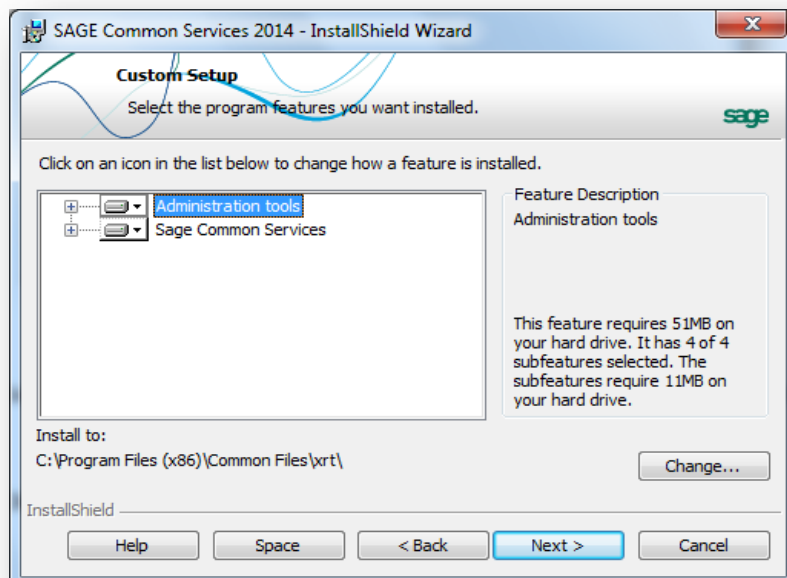
- **Standalone Machine:** To install administrations tools and products on the same computer. This option installs everything except the XCS service, which is required for automatic bank imports.
- **Administration Machine:** to set a dedicated Administration computer. All components are installed.
- **Custom Setup:** to select the component(s) you want to install.
- **Client Machine:** to install the tools required by SAGE applications in network configuration (with a computer dedicated to the administration of SAGE applications). This does not include the Administration tools.

The **Standalone Machine**, **Client Machine** and **Administration Machine** installation types enable to modify the installation path of the product without using the customized installation.



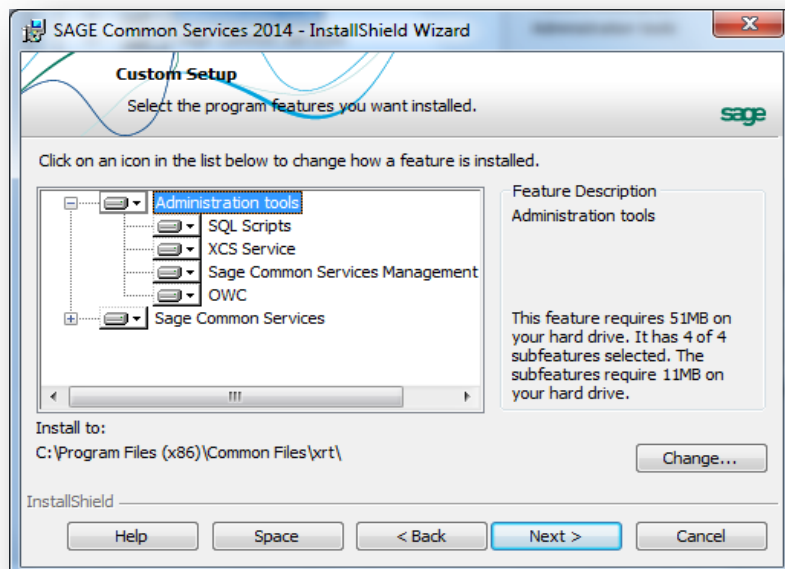
7. Select **Custom Setup** and click **Next**.

The **Custom Setup** screen is displayed:



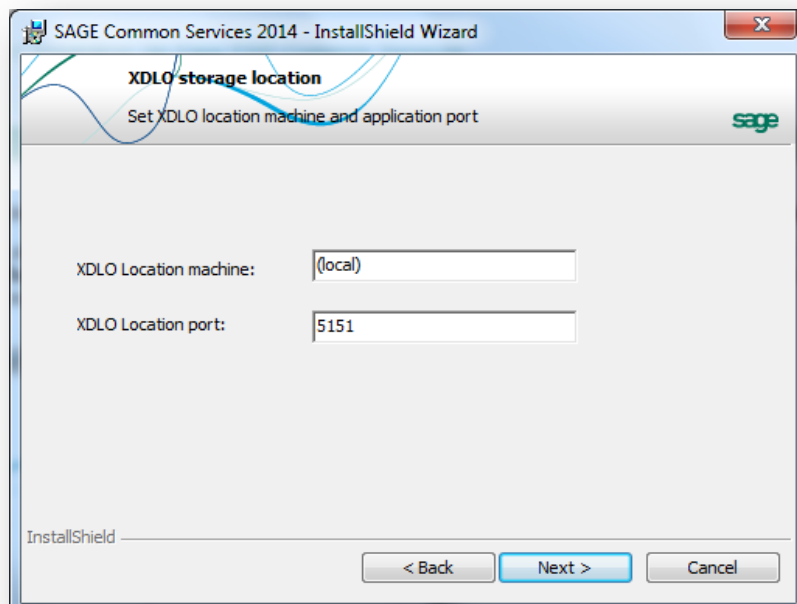
8. Click the **Administration Tools** icon to scroll down the contextual menu of each component.
9. Select **This feature and all of its sub features will be installed on local hard drive**.

The following screen is displayed:



10. Keep the default installation path or change it using the **Change...** button, then click **Next**.

The **XDLO storage location** screen appears:



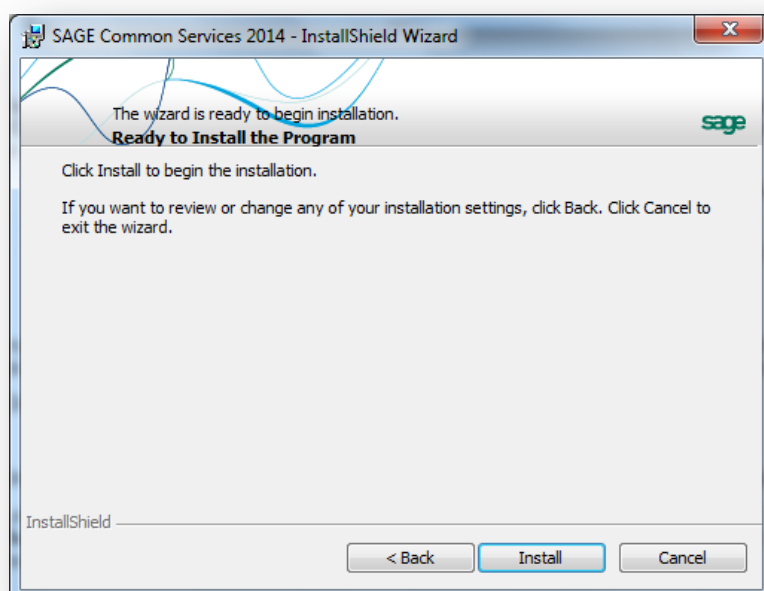
11. In the **XDLO Location machine** field, enter the computer name on which the XLDO service will be executed and in the **XDLO Location port** field the port number corresponding to the machine:
 - For **standalone machine** installation, keep the **(local)** default value.
 - For multistation installations, the XDLO repository should reside in a dedicated administration station.



As with the database server, users must have access to this computer at any time.

12. Click **Next**.

The **Ready to Install the Program** screen appears:



13. Click **Install**.



Web components are only required for SBE Web Server deployment.

Since the Microsoft XP Web Components are already installed, the **Maintenance Mode** window opens.

14. Select **Repair Office Web Components** and **Detect and Repair errors in my office Web Components installation**, then click **Install**.

15. Click **Finish** in the **InstallShield Wizard Completed** screen.



InstallShield may prompt you to restart the computer.

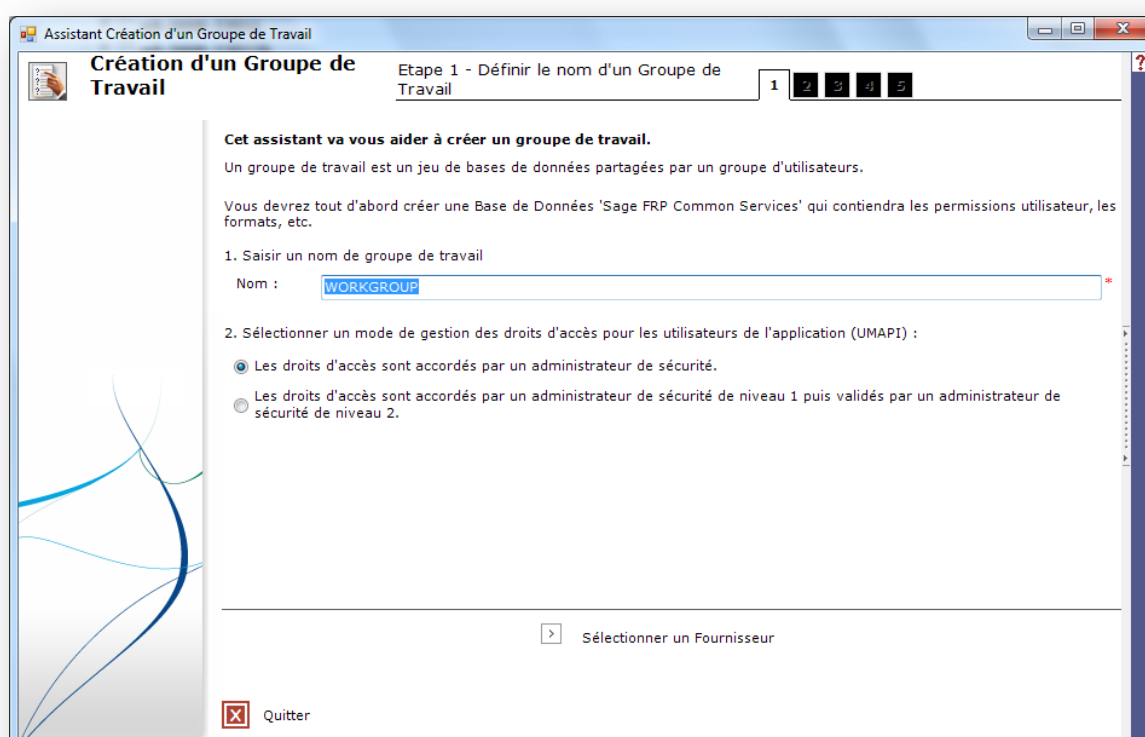
The **Sage/Sage Administration** shortcut now appears in the program list of the **Start** menu.

Using Sage FRP Common Services

Creating (SQL Server) Workgroups before first use

Step 1: Define a Workgroup name

1. In the **Start** menu, select **Programs/Sage/Sage Administration/Administration Sage.NET** to launch the **Workgroup Creation** wizard.
2. Enter a name for the Workgroup or keep the **WORKGROUP** default value.



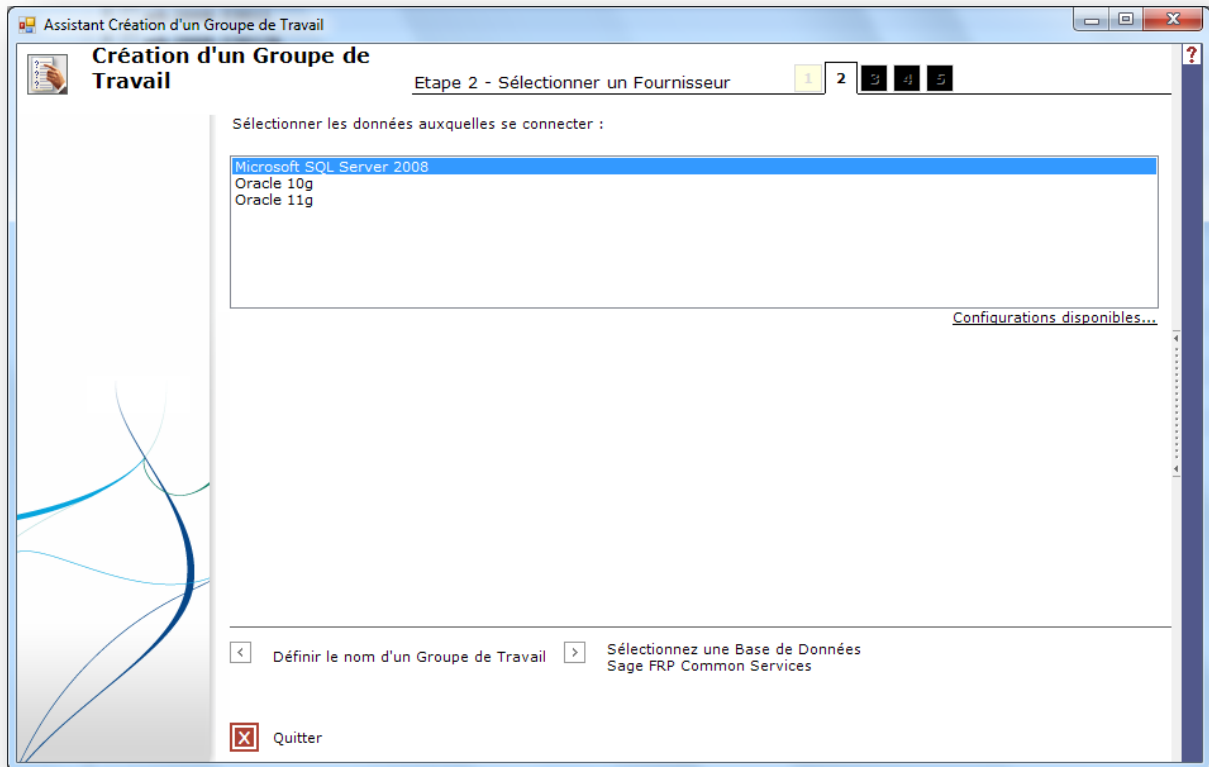
3. Select the management mode of access authorizations for Sage application users:

Rights Granting mode:

- Select "**Access permissions are granted by a security administrator**" if you want a simple access permissions management in which only one Security Administrator intervenes (default and most used mode).
- Select "**Access permissions are granted by a level 1 security administrator and validated by a level 2 security administrator**" if you want an access permissions management in which every action taken by Security Administrator must be validated by a second one.

Step 2: Select a Provider

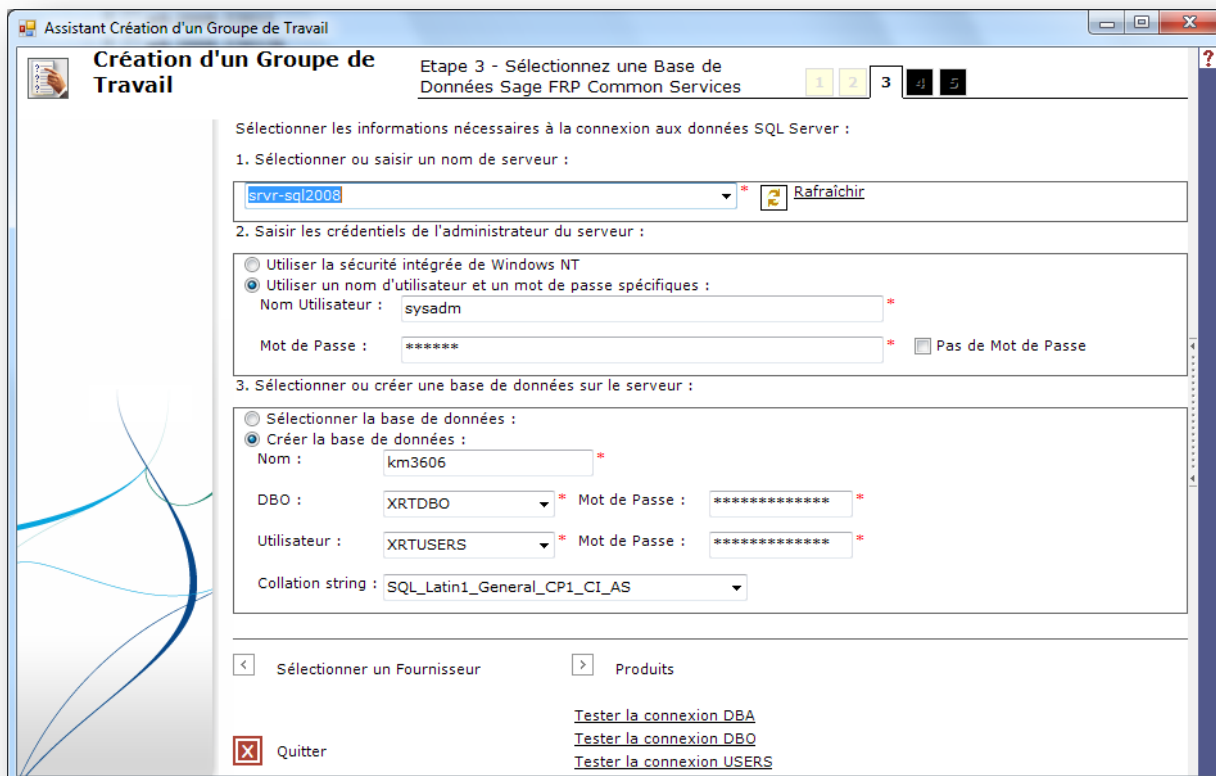
1. Select in the list the installed database server or client (here Microsoft SQL Server 2008).



Click **Available configurations...** to display the details of the database server and client which are installed on the computer, as well as the authorized operations (creation and update).

2. Click **Select Sage FRP Common Services Database.**

Step 3: Select a Database



Assistant Création d'un Groupe de Travail

Création d'un Groupe de Travail

Etape 3 - Sélectionnez une Base de Données Sage FRP Common Services

Sélectionner les informations nécessaires à la connexion aux données SQL Server :

1. Sélectionner ou saisir un nom de serveur :

srvr-sql2008 * [Rafraîchir](#)

2. Saisir les crédeniels de l'administrateur du serveur :

☐ Utiliser la sécurité intégrée de Windows NT

☒ Utiliser un nom d'utilisateur et un mot de passe spécifiques :

Nom Utilisateur : sysadm *

Mot de Passe : ***** * ☐ Pas de Mot de Passe

3. Sélectionner ou créer une base de données sur le serveur :

☐ Sélectionner la base de données :

☒ Créer la base de données :

Nom : km3606 *

DBO : XRTDBO * Mot de Passe : ***** *

Utilisateur : XRTUSERS * Mot de Passe : ***** *

Collation string : SQL_Latin1_General_CP1_CI_AS

< Sélectionner un Fournisseur > Produits

[Tester la connexion DBA](#)

[Tester la connexion DBO](#)

[Tester la connexion USERS](#)

☒ Quitter

1. Enter the name of the server where you want to create the database. The available characters to name the server are: "(local)", "(LOCAL)", ".", "server name".
2. According to the authentication type used by the DBA to connect to the database server, you can select:
 - **Use Windows NT integrated security** to authenticate the DBA through its NT account.
 - **Use a specific user name and password** to authenticate the DBA using a user name and a password.

Click **Test DBA connection** to check DBA credentials.

Select one of the two options:

- **Select the database** if you want to work on an existing database:

- a. Select the database (the database list is refreshed upon first display).
- b. Enter the password corresponding to the DBO and XRTUSERS names displayed in the **DBO** and **User** fields.

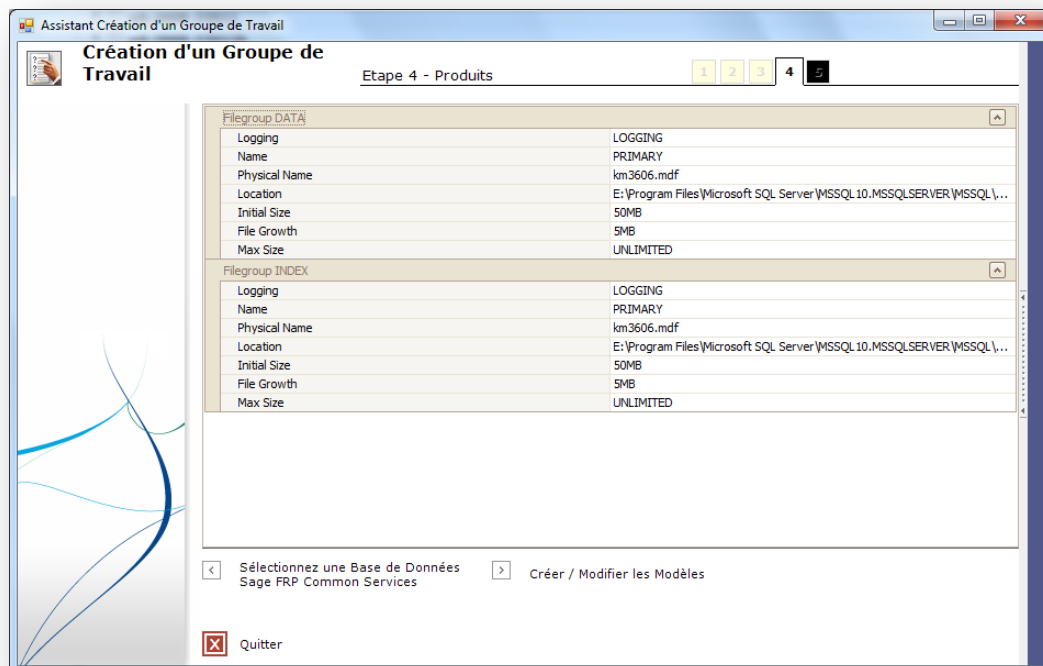
The default password is **password#2005** (when the user selects a database from the list, the wizard searches automatically for the name of its owner; the wizard uses the DBA account to perform this operation).

- **Create the database** if you want a new database.
 - a. Enter the database Name: the wizard checks whether this name is already used for another database, when the user clicks **Create/Modify models**.
 - b. For the **DBO** and **Users** fields corresponding to the **XRTDBO** and **XRTUSERS** accounts, leave the default passwords: **password#2005**.
 - c. Select the **Collation String** or keep the default one: **French_CI_AS** (no distinction between uppercase and lowercase).

3. Click **Products** to display the next Step.

Step 4: Products

In the default scenario, the "Filegroup DATA" tables and the indexes of the "Filegroup INDEX" model are created in the "PRIMARY" filegroup.



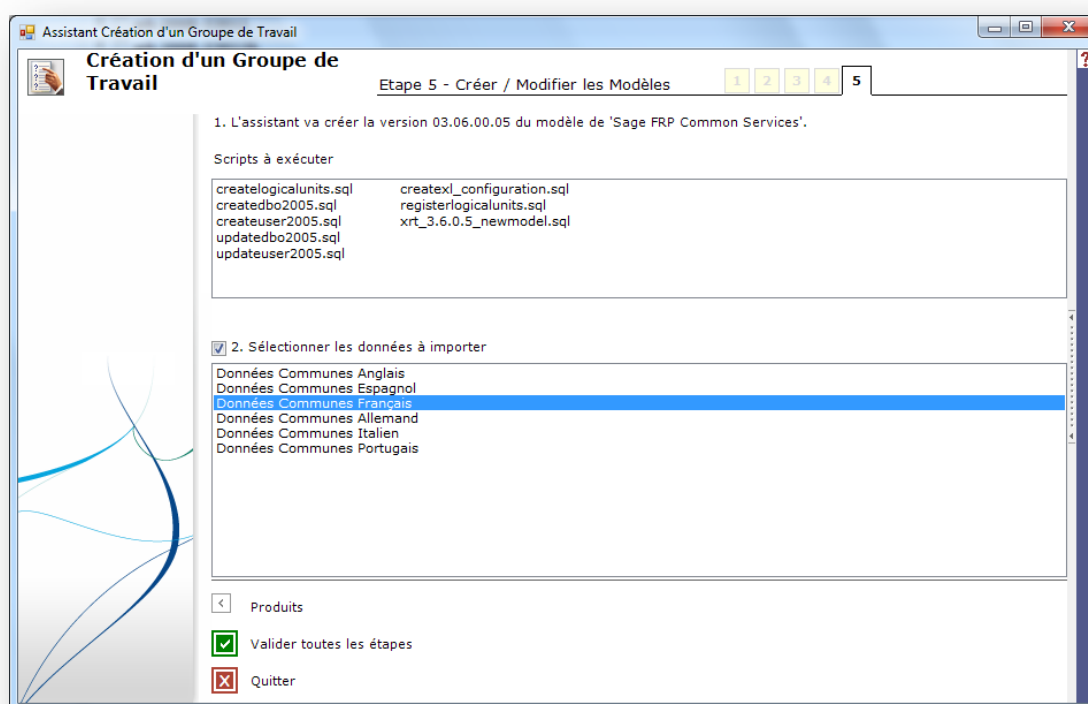
This properties pane enables to:

- Either modify the proposed scenario and install indexes in 2 distinct Filegroups (example: FCS_DATA and FCS_INDEX).
- Or modify the filegroup creation settings (storage directory, initial size, maximum size, file growth). The storage directory must already exist if you want the creation process to work properly.

Click **Create/Update Models** to display the next Step.

Step 5: Create/Update Models

The Scripts to be executed list includes all the scripts to be executed to create "Sage FRP Common Services" model.

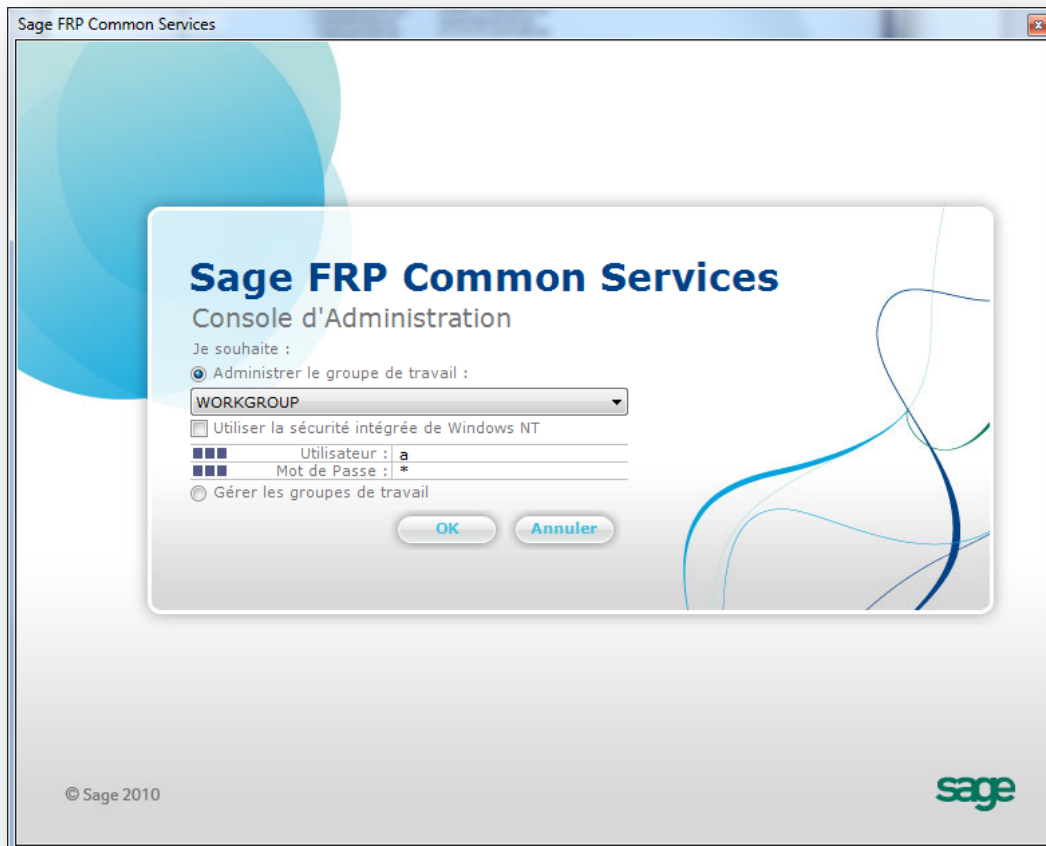


1. Enable the Select data to be imported option (mandatory for FCS) then select the language of XML data for APIFMT, TRANSCO and UMAPI.
2. Click Validate all steps to execute all the operations set up in the Workgroup Creation wizard.
3. This may take several minutes. Once all the operations are completed successfully, the FCS model is created.
4. Click Exit, then launch the Administration Console or continue with the creation of a Product model.

Starting Sage FRP Common Services

Welcome Screen

When launching the Administration Console for the first time, use the "a" user name without password to open the Console.



For the Administration Console, two operating modes are available:

- **Administrate the workgroup**

This mode provides the following services:

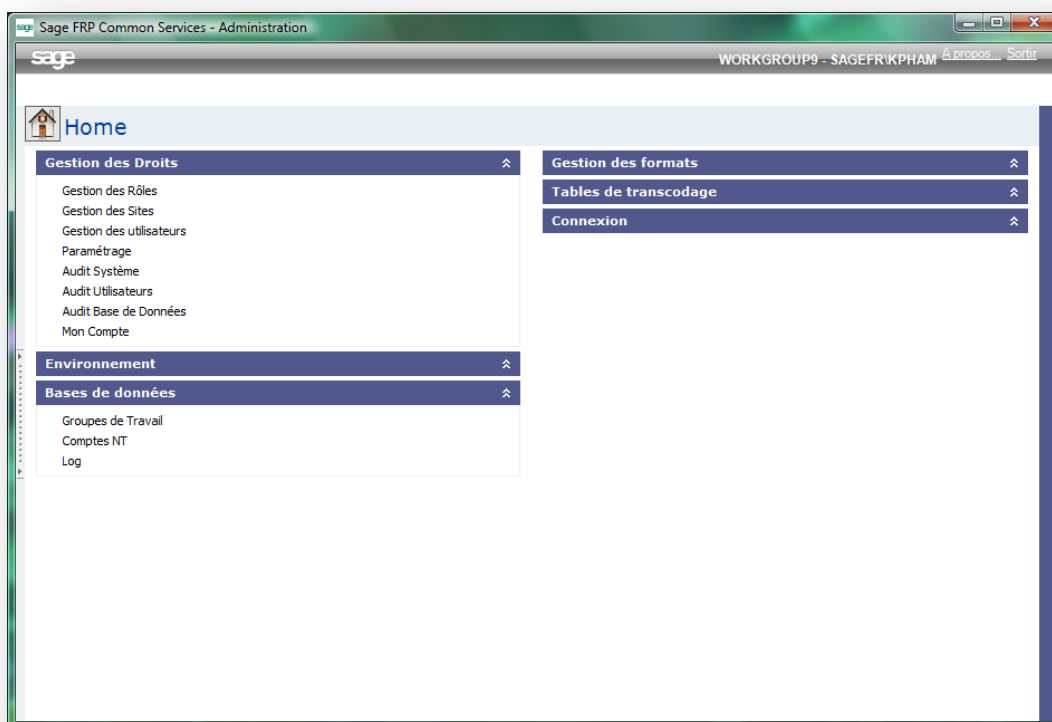
- The administration of Application Access Rights for the selected workgroup users
- The administration of Formats for the selected workgroup
- The administration of Transcoding Tables for the selected workgroup

This mode grants access to UMAPI User Management. You must identify using an NT User Account from the workgroup or an Application Account (here "a").

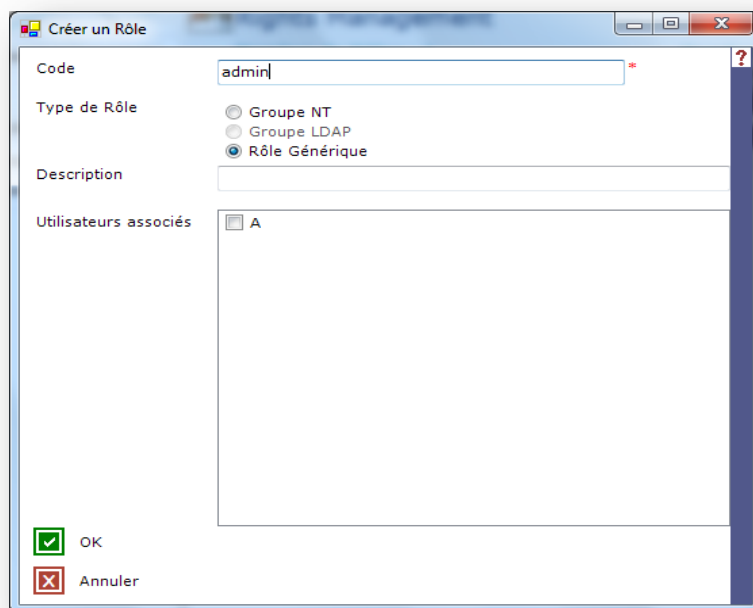
NT Authentication also consists in 2 modes:

- **Trusted connection:** The password is not necessary.
- **Strong authentication:** the user needs to enter his/her password to enter the administration console. This operating mode secures the access to an application available on a station which has not been locked.
- **Manage Workgroups**
This operating mode is designed for the System Administrators who manage Workgroups. This mode provides the following services:
 - Creating/Deleting Workgroups
 - Adding users to Workgroups
 - Deleting users
 - Updating the databases of a Workgroup

Managing Roles



1. Select the Manage Roles menu, then the Create Role action.
2. Roles group users with the same rights. Rights define users' access to product functions.



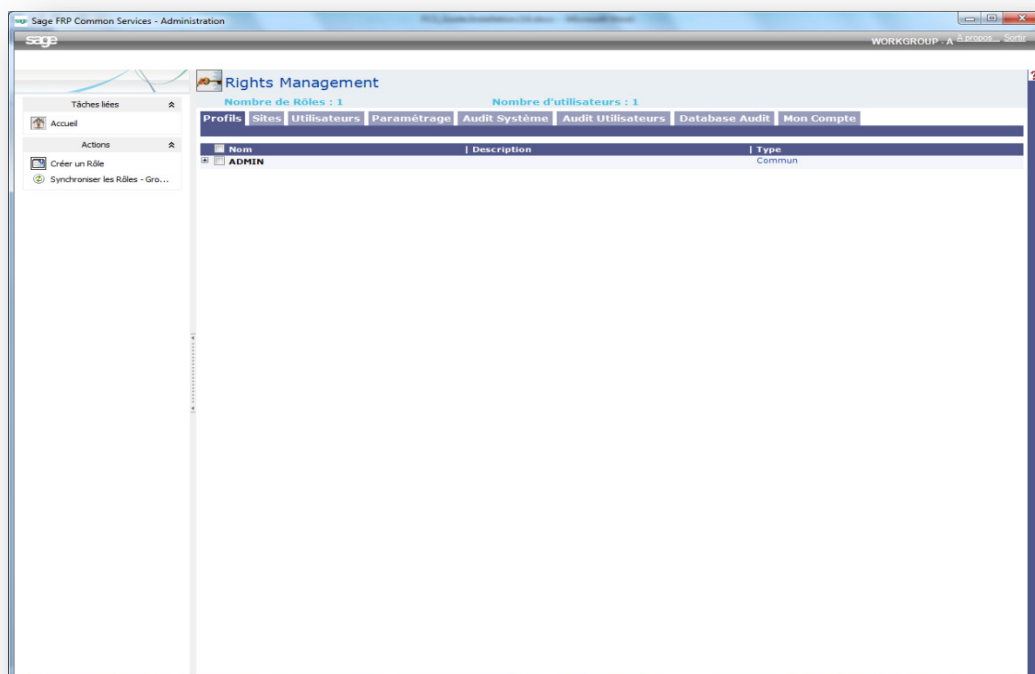
3. Enter "**admin**" as a code to identify the role (no space).
4. Fill in the **Description** field if necessary.
5. Select the **Generic Role** default option.



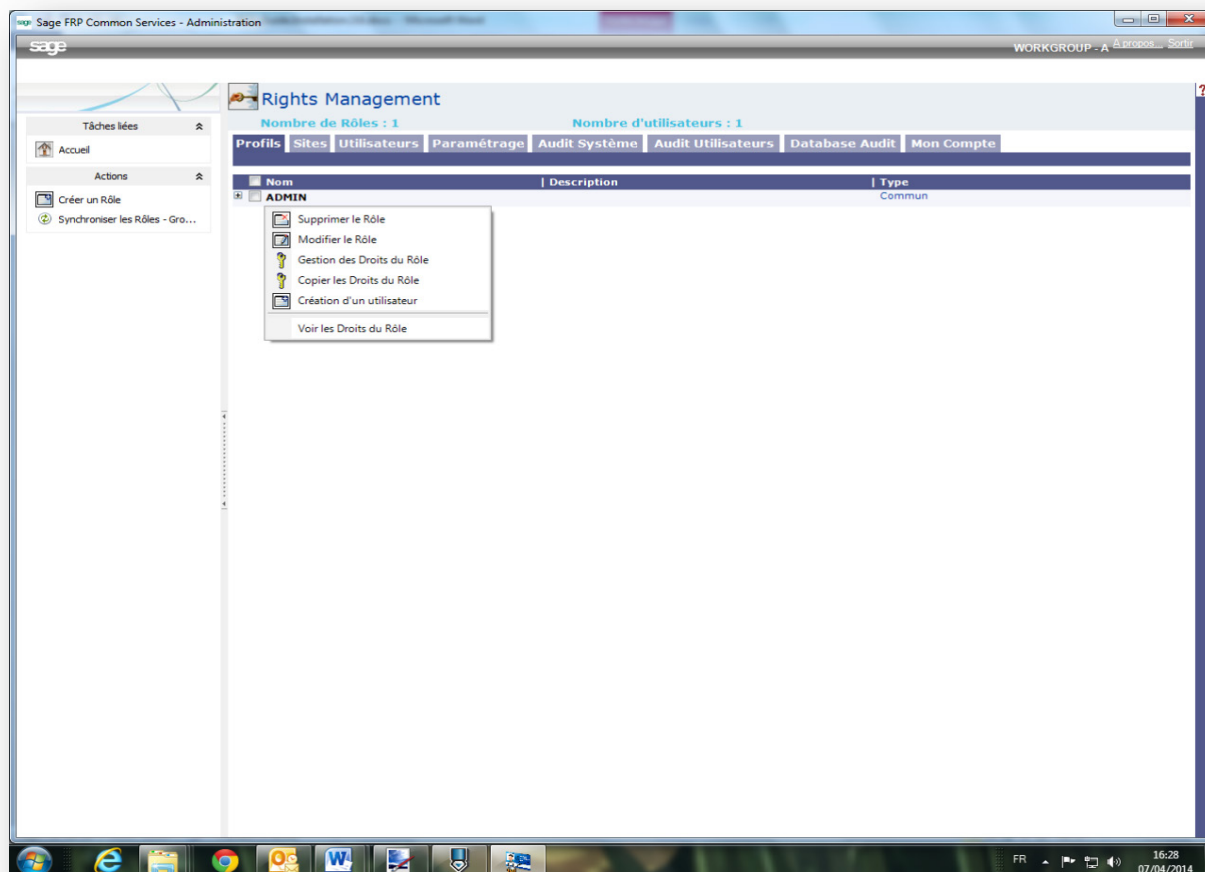
In order to provide the best integration of Sage applications within companies infrastructures, it is possible to rely on NT or LDAP-type groups.

The creation of an LDAP group is linked to the configuration of the access of the company directory.

ADMIN role is now created:

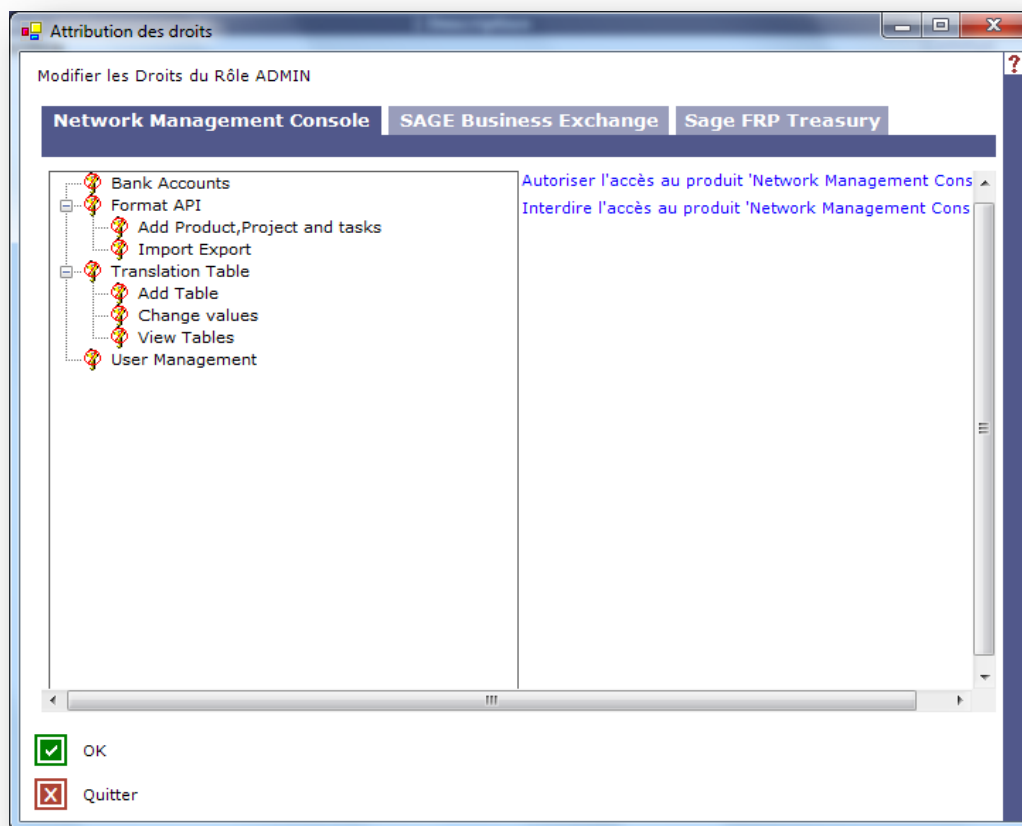


Managing Role's Rights

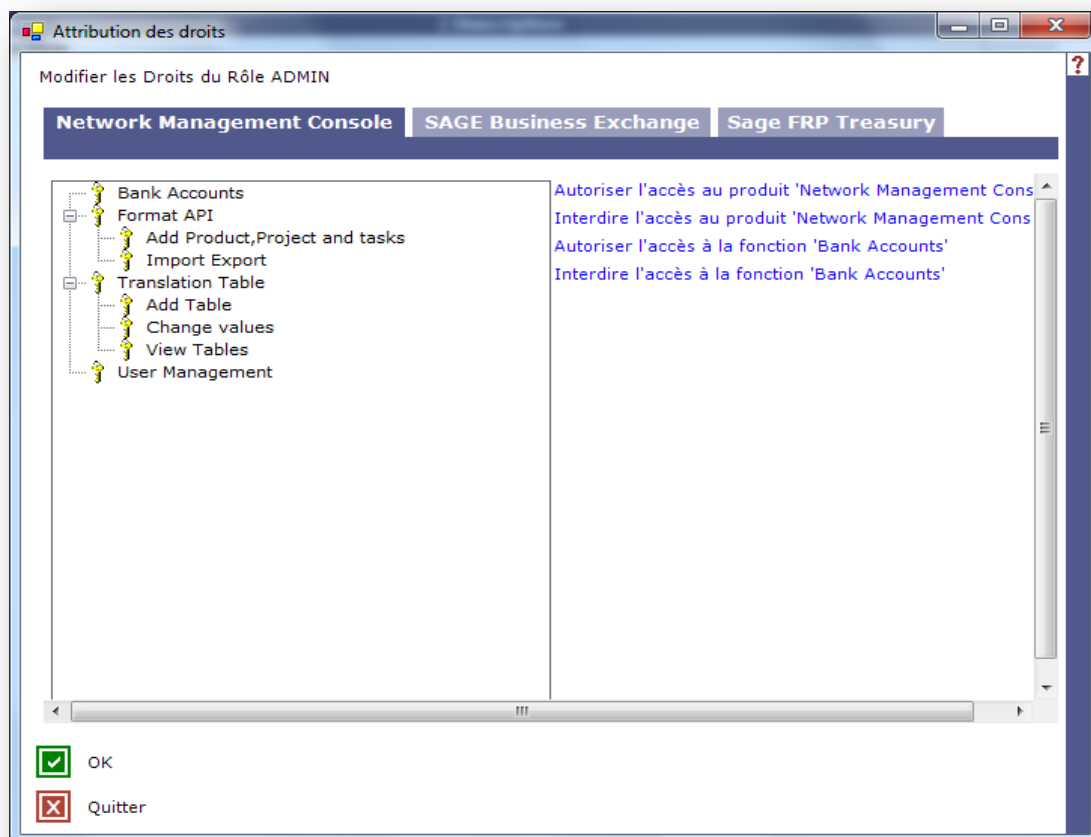


1. Select **Manage Role's Rights** to set up rights for the Role.

The **Grant Rights** page is displayed. It enables the management of access rights to the various Sage products installed on your server.

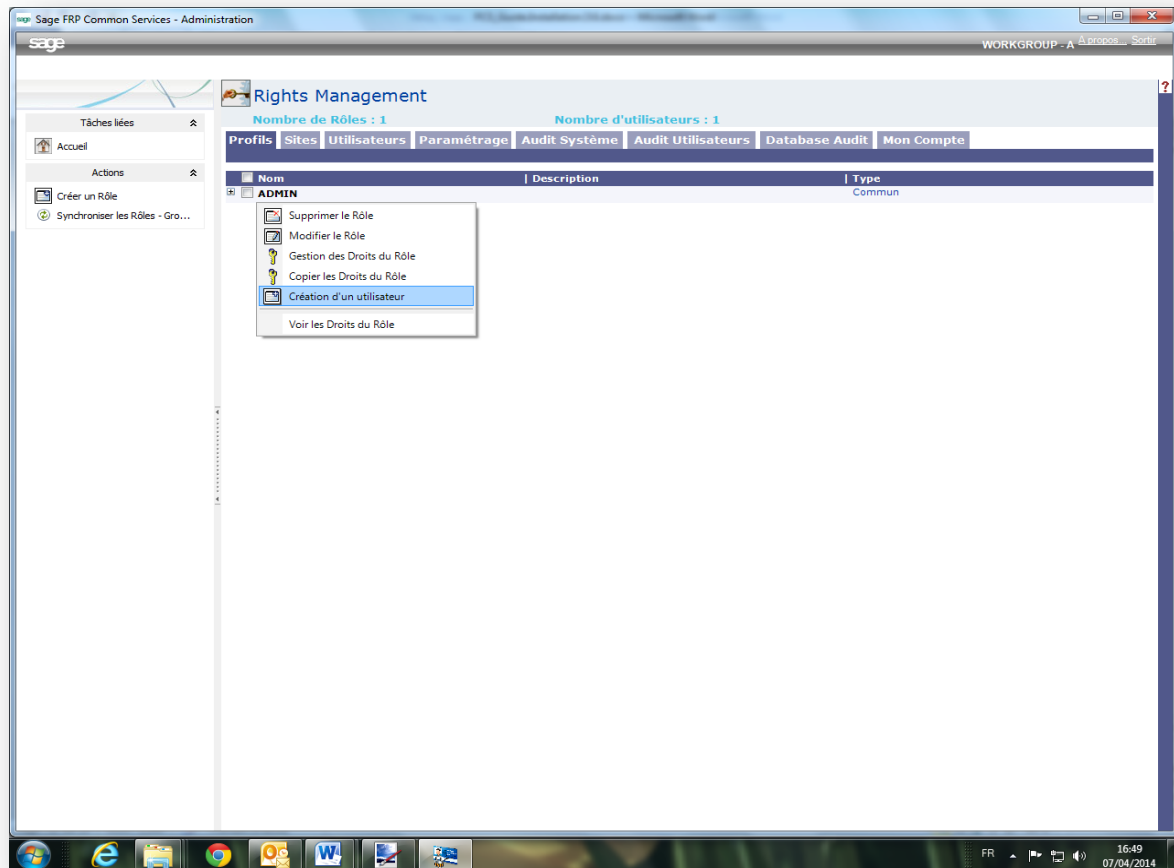


2. Select **Authorize Access to 'Network Management Console' Product** to grant all rights to the Administration Console.

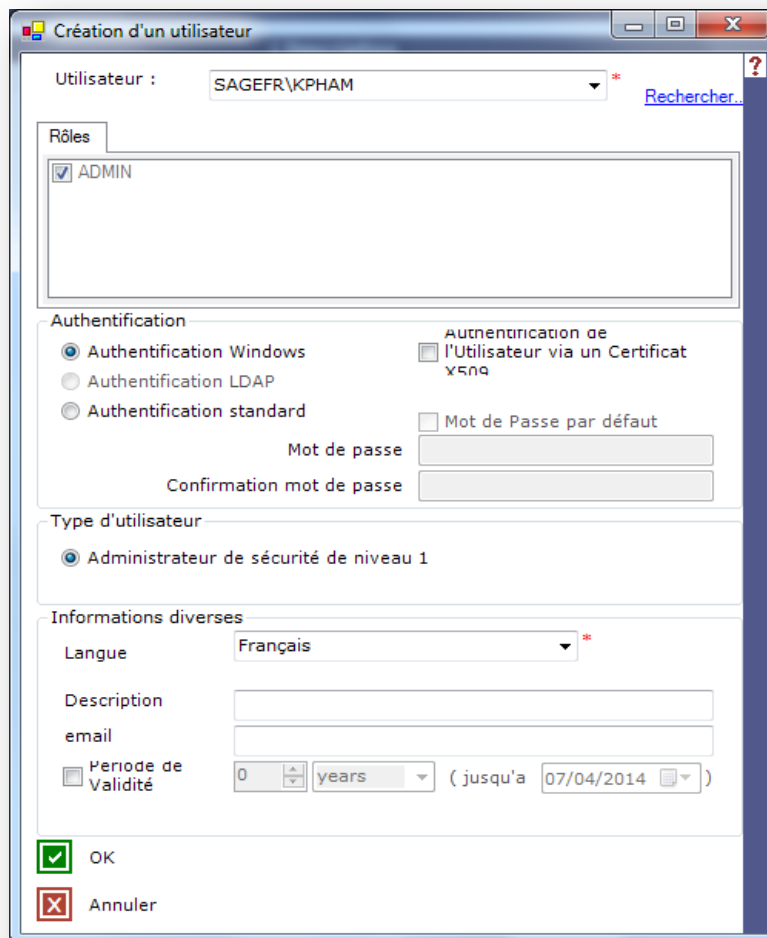


3. According to your needs, set up the Rights in the **Sage Business Exchange** and **Sage FRP Treasury** tabs.

Creating Users



1. Select the **Create a user** menu.
The following window is displayed:



2. Select the authentication mode and enter the user name.

- The **Windows Authentication** mode offers two addition methods for NT users:
 - Adding a user by selecting a person from the list in the dialog box relies on the workgroup management. This mode implies the previous definition of the database access for each user.
 - It is also possible to add a person by searching a user through the company directory. In that case, the user gains access to the **XRTUsers**-type database.
- **Authentication via X509 Certificate**: select this option if you need strong authentication for SBE.
- **LDAP authentication**: use the **Search...** link to select users within the directory set up in the LDAP authentication configuration.
- **Standard Authentication**: enter a unique identifier for the user.

3. Choose the type of user to be created:
 - **Level-1 security administrator:** he/she administrates access permissions for the Workgroup's users.
 - **Standard user:** User with no special power.
4. Fill in the **Miscellaneous** group box, then click **OK** and **Cancel** to close the dialog box and go back to the Roles treeview.