



Sage XRT Business Exchange

Version 12.2

Setup Guide



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Guidelines

This document describes how to install **Sage XRT Business Exchange** version 12.2.

We recommend that you install the following applications in this order:

1. **Sage XRT Bank Format Library**
2. **Sage XRT Common Services**
3. **Sage XRT Business Exchange**

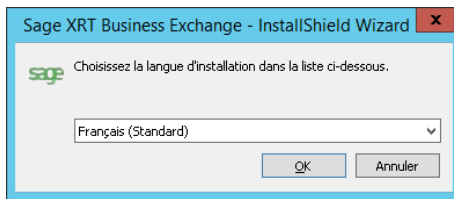
All applications must be closed before the installation starts.

First installation

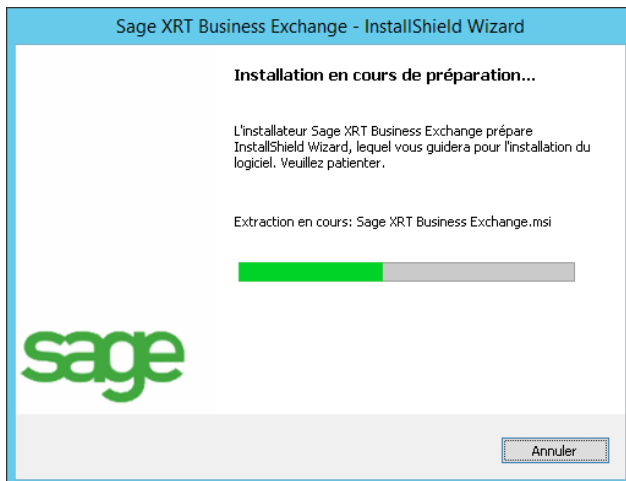
To proceed with the installation of **Sage XRT Business Exchange** version 12.2, you first need to install **Sage Bank Format Library** and **Sage XRT Common Services**. For more information, please refer to the product guides.

Then, you can apply the following process.

1. In **Products - Sage XRT Business Exchange**, execute the .exe setup file. The installation status window is displayed.
2. Select the language for the installation of **Sage XRT Business Exchange**. Click **OK**.



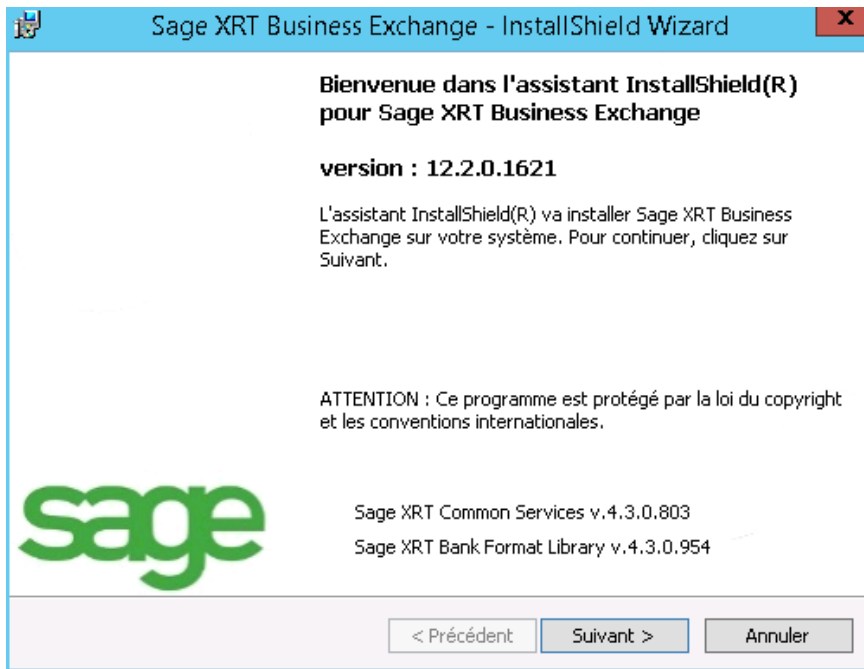
3. In the **Sage XRT Business Exchange** installation window, click **Next**.



Note: Click **Cancel** to abort the installation process at any time.

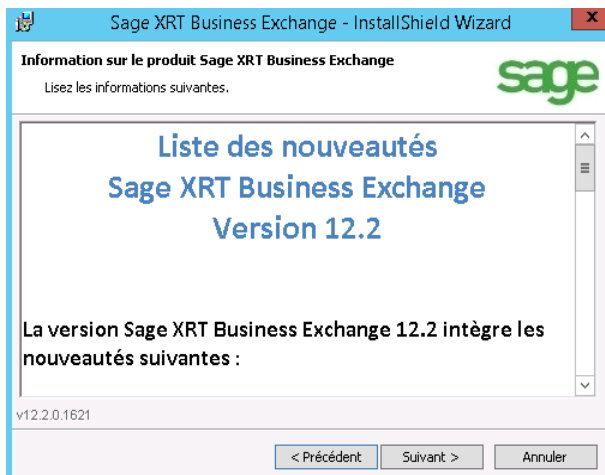
First installation

The next window recaps the update to be performed along with your current version number of **Sage XRT Common Services**.



Click **Next**.

- Information on **Sage XRT Business Exchange** present the new features of this version.

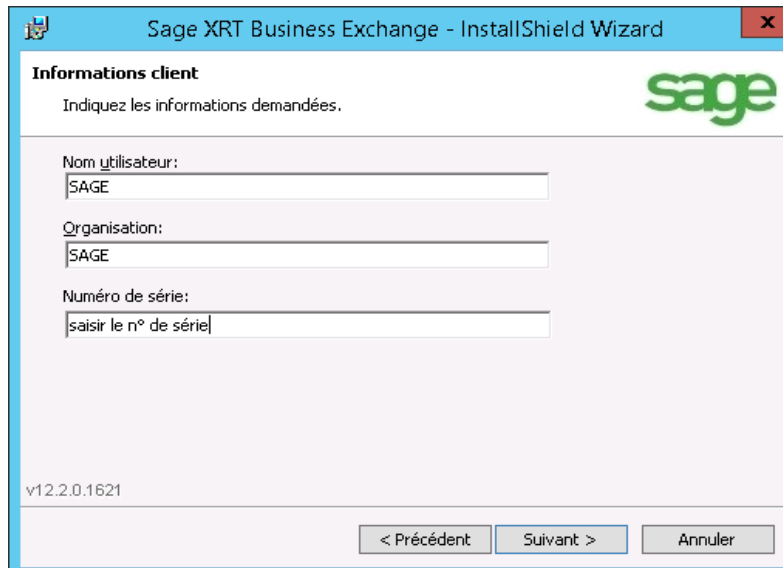


Click **Next**.

- In **Client Information**, complete the **User Name**, **Organization**, **Serial number**, as specified on the supplied license file.

These data correspond to the **Sage XRT Business Exchange** options purchased.

First installation



The screenshot shows the 'Informations client' window of the Sage XRT Business Exchange - InstallShield Wizard. The window has a blue title bar and a Sage logo in the top right. The main area is light purple and contains three text input fields: 'Nom utilisateur:' with 'SAGE' entered, 'Organisation:' with 'SAGE' entered, and 'Numéro de série:' with the placeholder 'saisir le n° de série'. Below the fields is the version number 'v12.2.0.1621'. At the bottom are three buttons: '< Précédent', 'Suivant >', and 'Annuler'.

Click **Next**.

In the **Destination Folder** window, you can modify folders for the product installation, the Signature Service workspace, the **Online Banking** site installation and log files.



The screenshot shows the 'Dossier cible' window of the Sage XRT Business Exchange - InstallShield Wizard. The window has a blue title bar and a Sage logo in the top right. The main area is light purple and contains four rows of folder information, each with an icon, a description, a path, and a 'Modifier...' button. The rows are: 1. 'Installer Sage XRT Business Exchange vers:' with path 'C:\Program Files\Sage\Sage XRT Business Exchange\'; 2. 'Espace de travail du service de signature:' with path 'C:\Program Files\Sage\Sage XRT Business Exchange\WKSPACE\'; 3. 'Répertoire du site OnlineBanking:' with path 'C:\Program Files\Sage\Sage XRT Business Exchange\Html\OnlineBanking\'; 4. 'Répertoire des fichiers traces:' with path 'C:\Program Files\Sage\Sage XRT Business Exchange\Traces\'. Below the rows is the version number 'v12.2.0.1621'. At the bottom are three buttons: '< Précédent', 'Suivant >', and 'Annuler'.

- To modify any of them, click **Modify**. Otherwise, go directly to the next step.

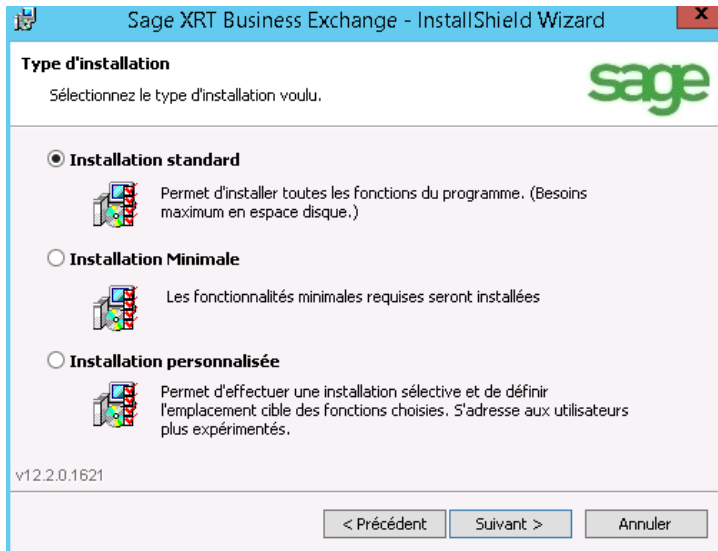
In the **Folder Name** field, enter the installation folder path. The search function enables you to explore quickly the directory.

Once you have entered the installation folder, click **OK** to return to the **Destination Folder** window.

Click **Next**.

- The **Installation Type** window offers three options.

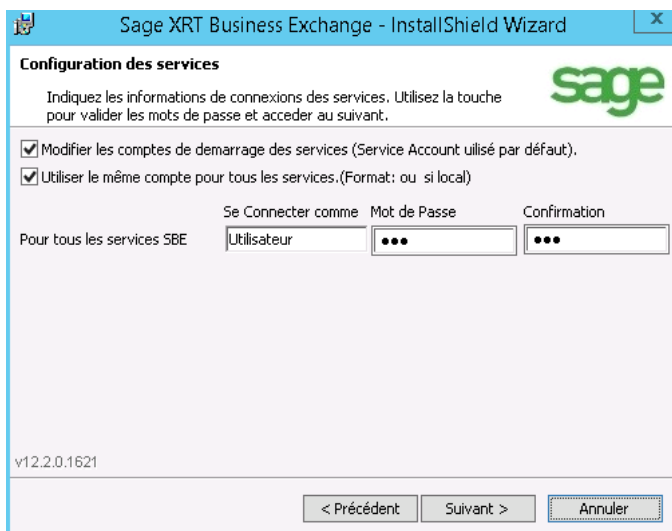
First installation



- The **Basic Installation** only installs **Sage XRT Business Exchange** components without the associated services: this corresponds to the use of a single client station.
- The **Custom Installation** option is suitable for experienced users only.
- The **Installation standard** is recommended as it installs **Sage XRT Business Exchange** components and the associated services altogether.

Click **Next**.

8. In Windows **Services Configuration**, you can **Change the Service Startup Account/Use the same account for all Services**. Complete the form if necessary and click the **Next** button.



Click **Next**.

First installation

9. The **SbeWebIhm Site Configuration** window enables the automatic creation of the site for the signature rules administration on **Sage XRT Business Exchange** server, the corresponding license is required.

The screenshot shows the 'Configuration du site SbeWebIhm' window. It has a title bar 'Sage XRT Business Exchange - InstallShield Wizard'. The main area contains the Sage logo and the text 'Entrez les informations nécessaires.' Below this is a checkbox 'Configuraion Internet Information Server' which is unchecked. There are four text input fields: 'Nom du site : SbeWebIhm', 'Nom du Répertoire Virtuel : Default Web Site', 'Chemin du Répertoire Virtuel : C:\Program Files\Sage\Sage XRT Business Exchange\Html\OnlineBanking\SbeWebIhm\', and 'Nom du pool d'application :'. There is a checkbox 'Modifier la configuration des services' which is also unchecked. At the bottom left is the version 'v12.2.0.1621'. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

Once you have it, select **Configuration Internet Information Server** and if necessary, **Modify services configuration**.

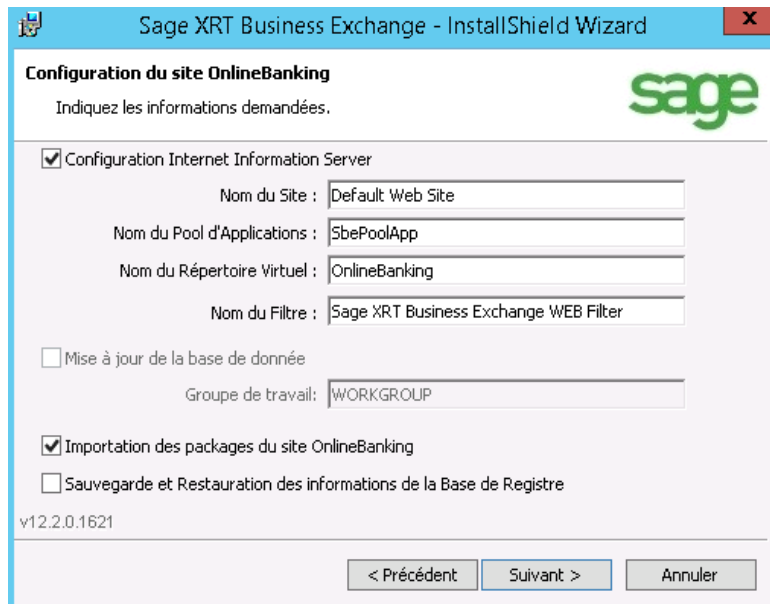
The screenshot shows the same 'Configuration du site SbeWebIhm' window, but with the 'Configuraion Internet Information Server' checkbox checked. Additionally, the 'Modifier la configuration des services' checkbox is also checked. Below these checkboxes are three text input fields for service URLs: 'Url du service Sage Rest Api: https://PHILAE-W12R2:4343/SbeRestApi/v1', 'Url du service d'authentification SCS: https://PHILAE-W12R2:8761', and 'Url du service de Presentation SCS: https://PHILAE-W12R2:8734'. The version 'v12.2.0.1621' and the '< Back', 'Next >', and 'Cancel' buttons are also present.

Important: After the installation, please check the **SXCS Service Authentication** in the System Administration for **Sage XRT Business Exchange**, from the **Specific** tab of **Onlinebanking** and the transaction service.

Click **Next**.

First installation

10. The **Online Banking site Configuration** window generates the automatic creation of the **Online Banking** site.



The screenshot shows the 'Configuration du site OnlineBanking' window of the Sage XRT Business Exchange - InstallShield Wizard. The window has a title bar with the Sage logo and a close button. The main area contains the following fields and options:

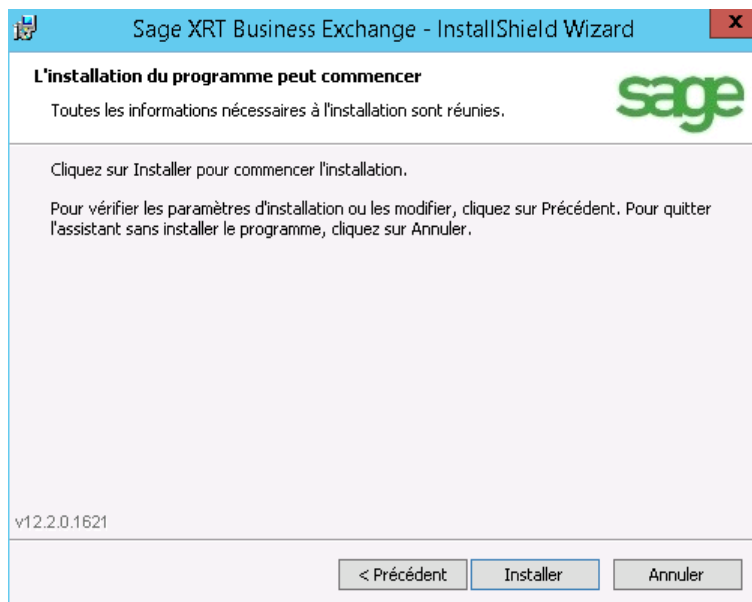
- ☒ Configuration Internet Information Server
 - Nom du Site : Default Web Site
 - Nom du Pool d'Applications : SbePoolApp
 - Nom du Répertoire Virtuel : OnlineBanking
 - Nom du Filtre : Sage XRT Business Exchange WEB Filter
- ☐ Mise à jour de la base de donnée
 - Groupe de travail: WORKGROUP
- ☒ Importation des packages du site OnlineBanking
- ☐ Sauvegarde et Restauration des informations de la Base de Registre

At the bottom left, the version 'v12.2.0.1621' is displayed. At the bottom right, there are three buttons: '< Précédent', 'Suivant >', and 'Annuler'.

Select **Configuration Internet Information Server** and click **Next**.

Important: To update the installation from version 11 to version 12, we strongly recommend the selection of **Backup and Restore Registry Information**. This choice actually removes all protocol data previously set up in the registry.

11. In the next window, click the **Install** button.



The screenshot shows the 'L'installation du programme peut commencer' window of the Sage XRT Business Exchange - InstallShield Wizard. The window has a title bar with the Sage logo and a close button. The main area contains the following text:

Toutes les informations nécessaires à l'installation sont réunies.

Cliquez sur Installer pour commencer l'installation.

Pour vérifier les paramètres d'installation ou les modifier, cliquez sur Précédent. Pour quitter l'assistant sans installer le programme, cliquez sur Annuler.

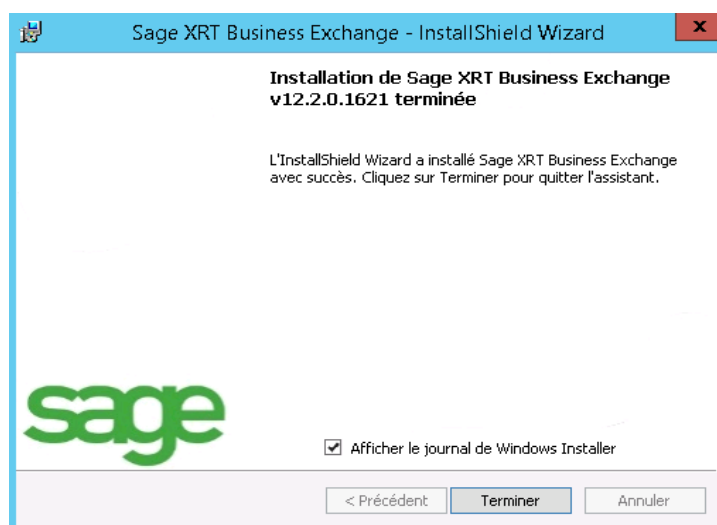
At the bottom left, the version 'v12.2.0.1621' is displayed. At the bottom right, there are three buttons: '< Précédent', 'Installer', and 'Annuler'.

The **Sage XRT Business Exchange** installation window appears.

12. Select the option **Display Windows Installer log**, and click **Finish** to close the wizard.

First installation

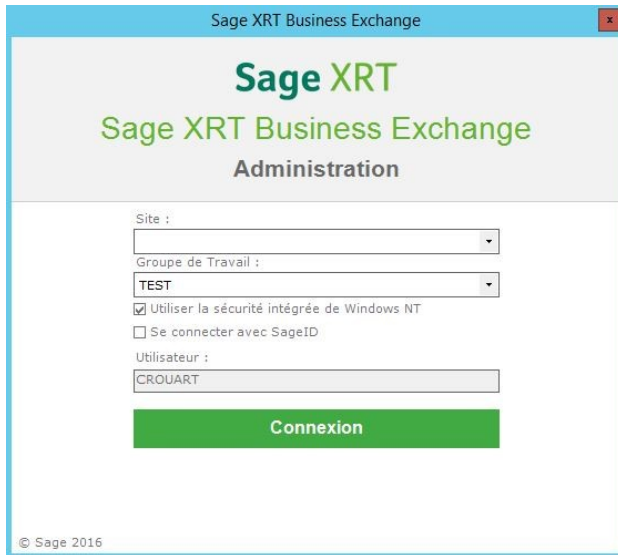
The following message confirms the actual installation of **Sage XRT Business Exchange**.



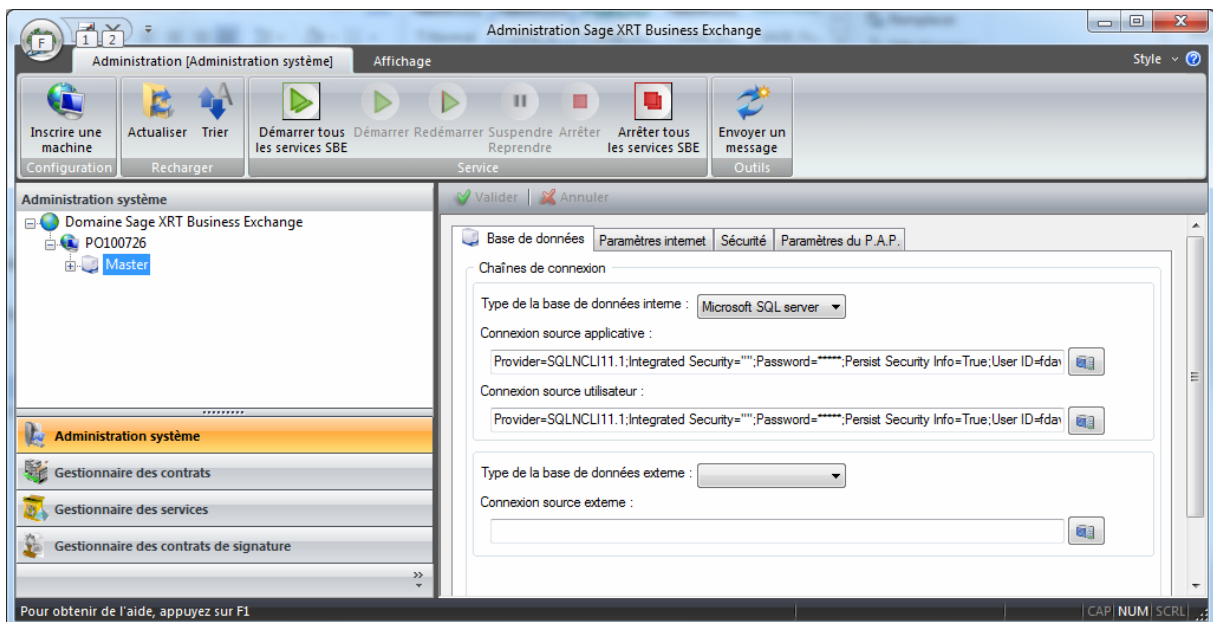
Usage

If using **Sage XRT Business Exchange** for the first time, the data source required to access the application, has to be selected.

From the **Start** menu, select **All Programs - Sage - Sage XRT Business Exchange - Sage SXBE Administration**.



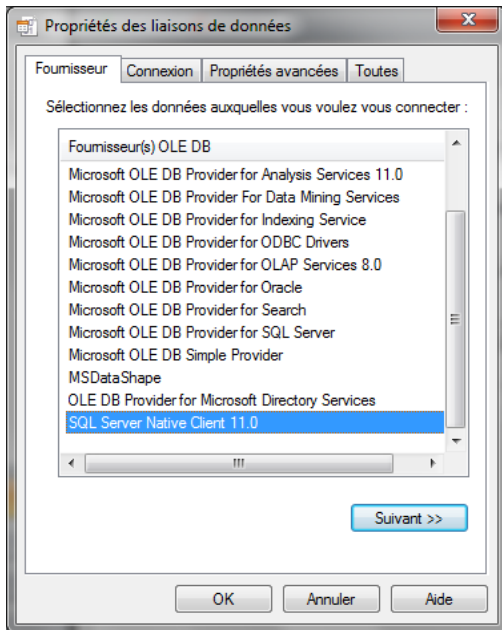
The interface of **Administration Sage XRT Business Exchange** is displayed.



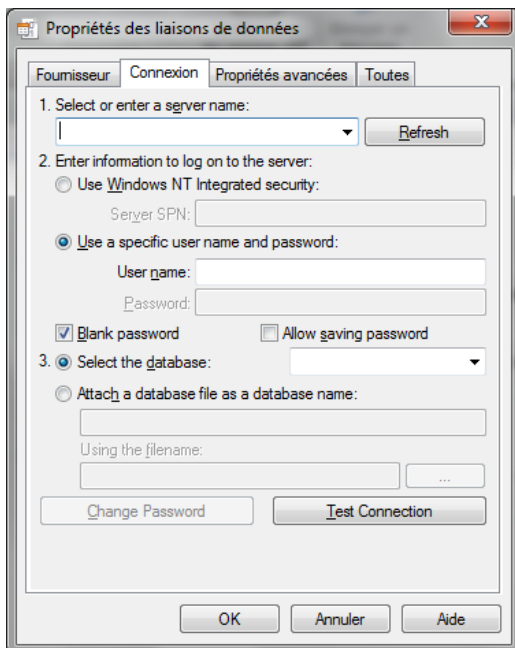
In the **Databases** tab, select the **Internal Database Type**.

Click the icons for **Connection to Application/User Source** and select your **SQL** or **Oracle** provider.

Usage



Click **Next** and complete the connection properties in the corresponding tab.



Validate the creation using the **OK** button and redo the process for the other sources.

Further Information

The installation update from version 11.40 32 bits to 12 64 bits is not supported. Uninstalling version 11.40 32 bits and installing version 12 are required.

Guides dedicated to **Sage XRT Business Exchange** are available from **Start - All Programs - Sage/Sage XRT Business Exchange - Documentation**:

- *User Guide*
- *Error Code Guide*
- *Network Interface Guide*
- *Protocol Guide*

At any and from any **Sage Business Exchange** module, you can peruse our **Online Help Center** with a single click on **F1**.

For information on how to install and configure **Online Banking**, see the dedicated Installation Guide provided.