



# Sage 100 ERP 2014 Intelligence Reporting Citrix Installation Guide

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# Installation Guide

## Introduction

This Installation Guide is intended to explain the process to be followed to install, configure and license Sage Intelligence Reporting on a Terminal Server, Citrix XenApp/XenDesktop Load Balanced or Single Server Instance environment.

This guide caters for installing Sage Intelligence in a Citrix environment for use with the following products:

- Sage 100 ERP Standard 2014
- Sage 100 ERP Advanced 2014
- Sage 100 ERP Premium 2014

## Repository

The Sage Intelligence Reporting repository stores metadata, all reports, security rules, license details and other configurations. This repository should always be setup on a server or workstation which is centrally accessible via a network connection to all workstations which have Sage 100 ERP and Sage Intelligence Reporting installed.

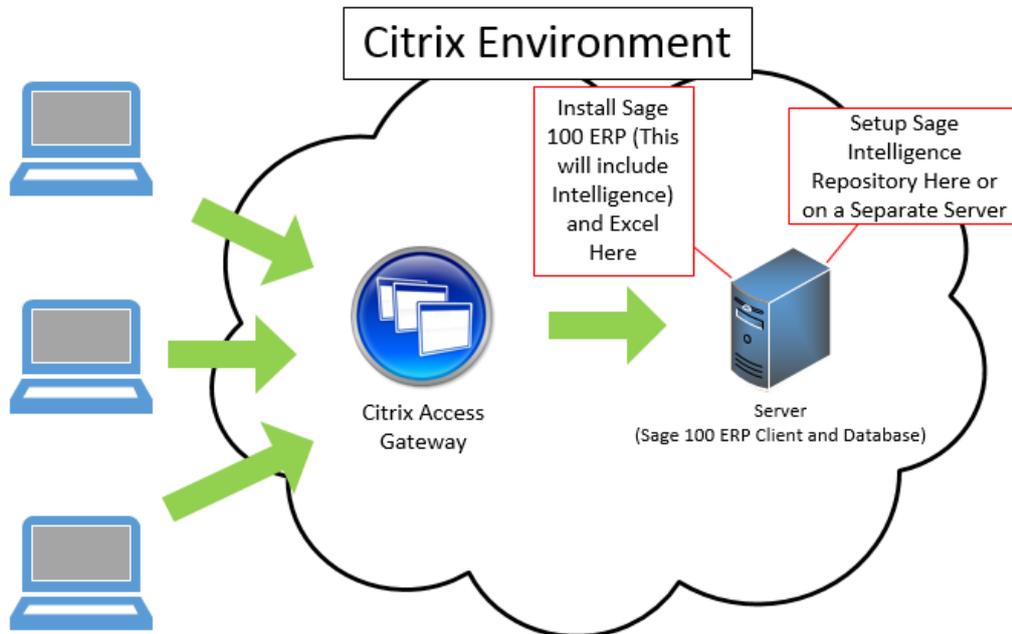
## Licensing

Intelligence Reporting uses a workstation licensing model whereby licenses are assigned to workstations which need access to the Intelligence Reporting modules. Four license types are available to be assigned and offer varying degrees of access:

- |                                 |   |
|---------------------------------|---|
| <b>Connector License:</b>       | This site license enables full access to all modules for the workstation it is licensed on. All other workstations will have access to the Sage Intelligence Connector but will consume an additional license count to launch Intelligence Reporting modules. |
| <b>Report Manager License:</b>  | This workstation license enables access to Sage Intelligence Report Manager and Sage Intelligence Report Viewer.  |
| <b>Report Viewer License:</b>   | This workstation license enables access only to the Report Viewer module.   |
| <b>Report Designer License:</b> | This site license will allow all workstations connected to the Server Database (SVD) access to the Sage Intelligence Report Designer module.  |

# Sage 100 ERP Standard

## Single Server Citrix Environment



## Installation

- Intelligence Reporting is an integrated installation component of both the Sage 100 ERP 2014 workstation installation and the Sage 100 ERP Standard installation. In a Sage 100 ERP Advanced or Premium environment, Intelligence Reporting requires a workstation installation before it can be accessed.
- It is recommended that the Intelligence Reporting shared report repository be created on the same server as Sage 100 ERP or another server accessible to the Sage 100 ERP workstation. Setting up the repository on a separate server caters for server count growth if load balancing is implemented in the future. All Sage 100 ERP users utilizing Intelligence Reporting must have read/write access to this repository.
- In order to utilize Intelligence Reporting, Microsoft® Excel® 2007, 2010 or 2013 must be installed on the same workstation as the Sage 100 ERP workstation. Excel must be registered and accessible to the Intelligence Reporting user.
- Access **Sage Intelligence Reporting > License Manager** and enter your **Account Number, Serial Number**. Perform registration for Intelligence Reporting to activate your licenses.

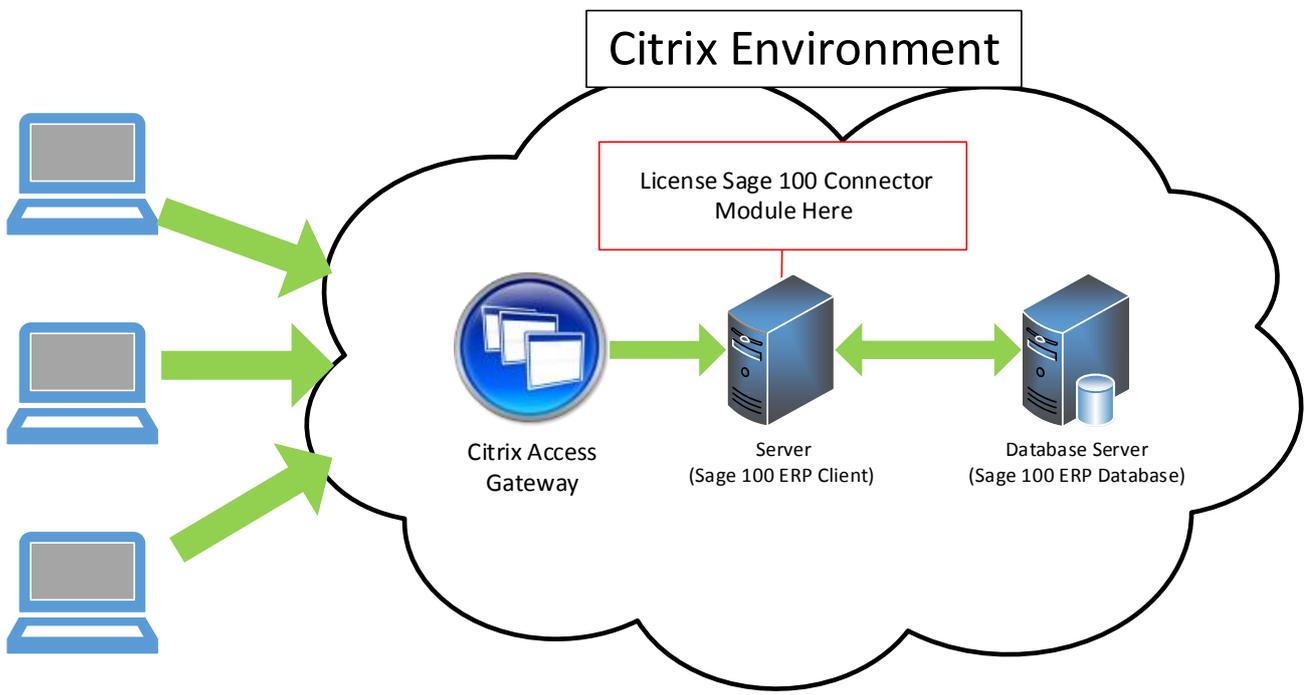
## Licensing

- In a single instance in a Terminal Server/Citrix environment, one Sage 100 ERP workstation installation is accessed by all Sage 100 ERP and Intelligence Reporting users. Intelligence Reporting assigns licenses by workstation and all users who access Intelligence Reporting via the single workstation installation will share the same workstation license. Purchasing a single Connector license is

recommended for a Terminal Server/Citrix environment hosting a single installation of the Sage 100 workstation, or a Sage 100 Standard installation without a workstation install. User access to Intelligence Reporting from the Sage 100 ERP launcher menu can be enabled or restricted utilizing Sage 100 ERP **Role Maintenance > Tasks > Sage Intelligence Reporting**.

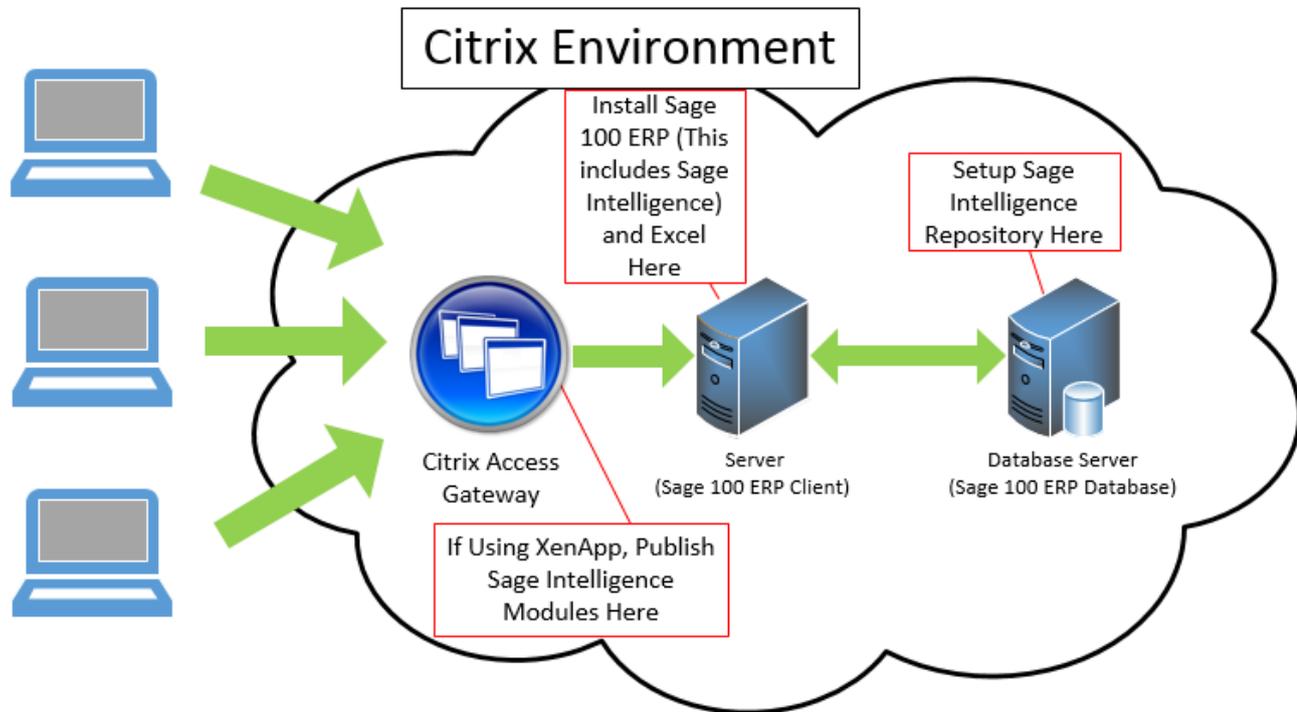
**Note:** The Administrator who installs Intelligence Reporting will need to “Perform Registration”.

- Navigate to ‘Modules’ then click ‘Sage Intelligence Reporting’. Click ‘Setup’ and select ‘License Manager’. Click ‘Perform Registration’. No other users on this workstation will be required to ‘Perform Registration’.



# Sage 100 ERP Advanced and Premium

## Single Client and Single Database Server Citrix Environment



## Installation

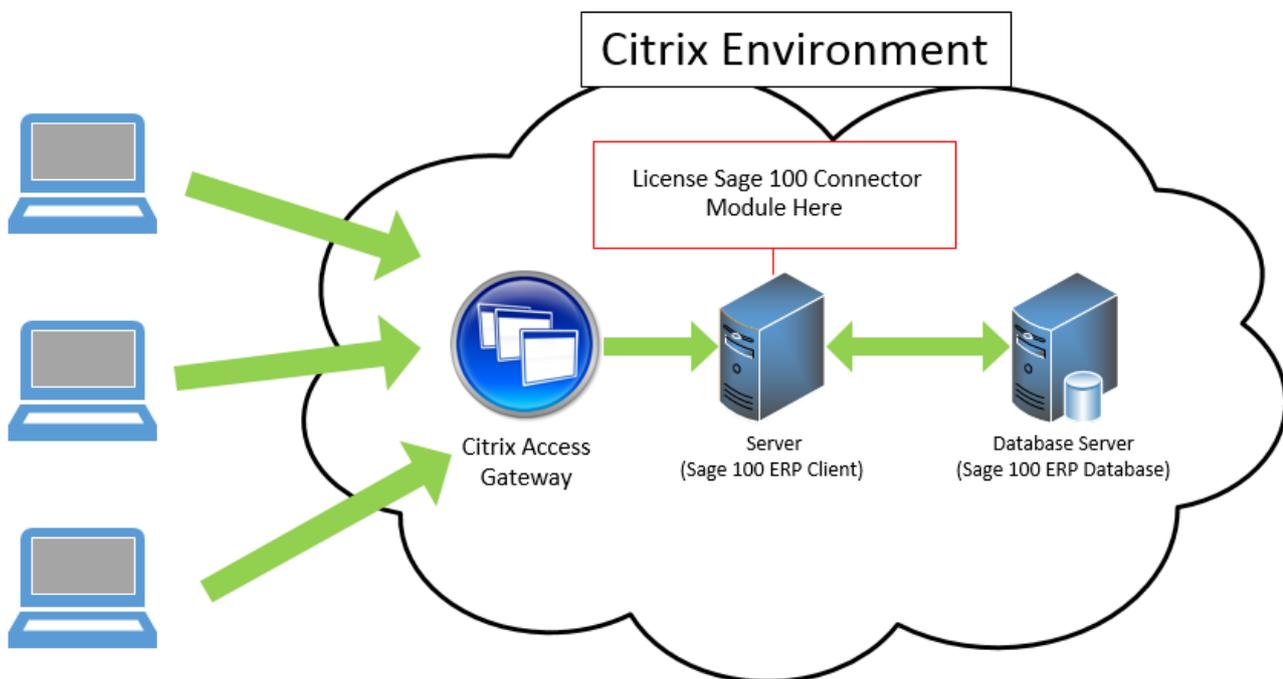
- Intelligence Reporting is an integrated installation component of both the Sage 100 ERP 2014 workstation installation and the Sage 100 ERP 2014 Standard installation. In a Sage 100 ERP Advanced or Premium environment Intelligence Reporting requires a workstation installation before it can be accessed.
- It is recommended that the Intelligence Reporting shared report repository be created on the same server as Sage 100 ERP or another server accessible to the Sage 100 ERP workstation. Setting up the repository on a separate server caters for server count growth if load balancing is implemented in the future. All Sage 100 ERP users utilizing Intelligence Reporting must have read/write access to this repository.
- In order to utilize Intelligence Reporting, Excel 2007, 2010 or 2013 must be installed on same workstation as the Sage 100 ERP workstation. Excel must be registered and accessible to the Intelligence Reporting user.
- Access **Sage Intelligence Reporting > License Manager** and enter your **Account Number, Serial Number**. 'Perform Registration' for Sage Intelligence Reporting to activate your licenses.

## Licensing

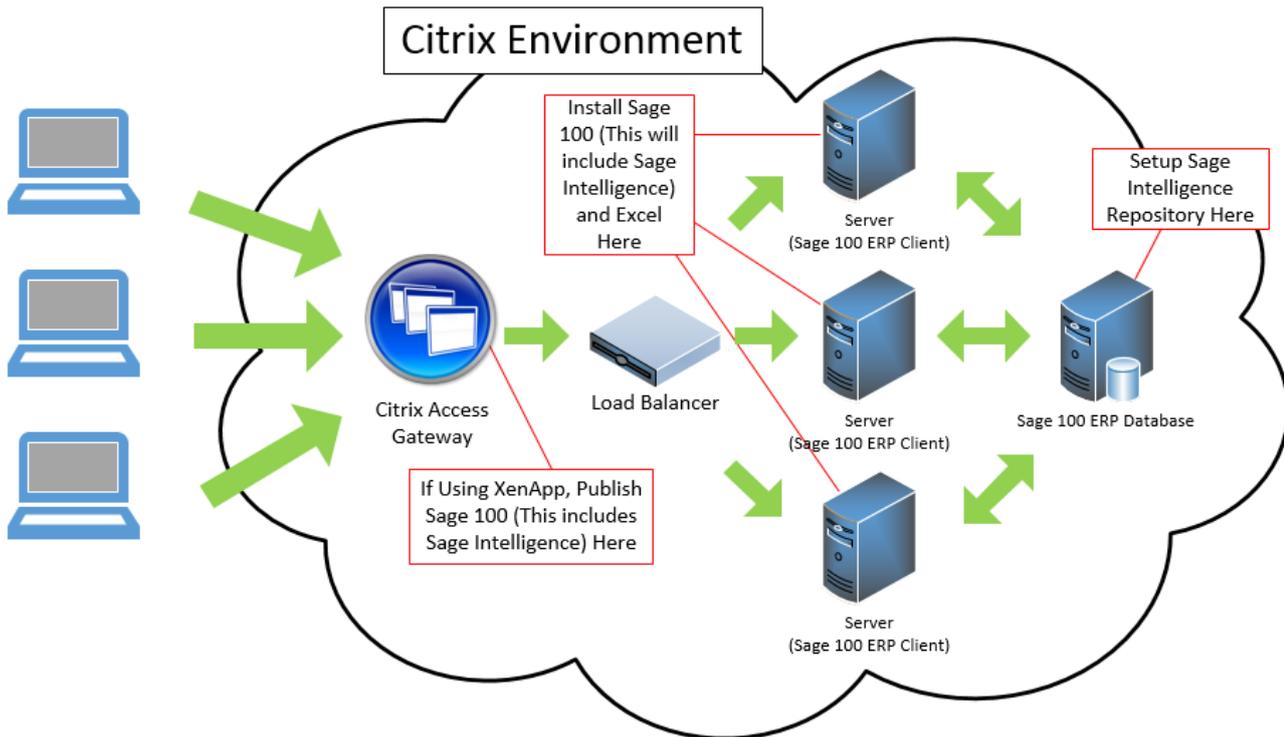
- In a single instance Terminal Server/Citrix environment, one Sage 100 ERP workstation installation is accessed by all Sage 100 ERP and Intelligence Reporting users. Intelligence Reporting assigns licenses by workstation and all users who access Intelligence Reporting via the single workstation installation will share the same workstation license. Purchasing a single Connector license is recommended for a Terminal Server/Citrix environment hosting a single installation of the Sage 100 workstation or a Sage 100 Standard installation without a workstation install.
- User access to Intelligence Reporting from the Sage 100 ERP launcher menu can be enabled or restricted utilizing 'Sage 100 ERP Role Maintenance', click 'Tasks' then click 'Sage Intelligence Reporting'.

**Note:** The Administrator who installs Sage Intelligence will need to 'Perform Registration'.

- Navigate to 'Modules' then click 'Sage Intelligence Reporting'. Click 'Setup' and select 'License Manager'. Click 'Perform Registration'. No other users on this workstation will be required to 'Perform Registration'.



## Load Balanced Citrix Environment



## Installation

- Intelligence Reporting is an integrated installation component of both the Sage 100 ERP 2014 workstation installation and the Sage 100 ERP Standard installation. In a Sage 100 ERP Advanced or Premium environment.
- Intelligence Reporting requires a workstation installation before it can be accessed.
- It is recommended that the Intelligence Reporting shared report repository be created on the same server as Sage 100 ERP or another server accessible to the Sage 100 ERP workstation. All Sage 100 ERP clients utilizing Intelligence Reporting must have read/write access to this repository.
- In order to utilize Sage Intelligence Reporting, Excel 2007, 2010 or 2013 must be installed on same workstation as the Sage 100 ERP workstation. Excel must be registered and accessed by the user prior to the Intelligence Reporting access.
- On each Terminal Server/Citrix Server when launching Intelligence Reporting for the first time, a prompt will appear requesting the location of the shared repository folder. Enter the UNC path of the repository shared folder.
- Access the **License Manager** and enter your **Account Number**, **Serial Number** and 'Perform Registration' for Intelligence Reporting to activate your licenses.
- After this step has been performed once on one Server, all other Sage 100 ERP (Intelligence Reporting) workstation installations on additional Servers will detect the licensing from the shared report repository and populate registration detail fields. If new licenses are purchased the Administrator would only need to click 'Perform Registration' and the addition Licenses will be available.

## Licensing

Within a load balanced Terminal Server/Citrix environment, each server instance must have a separate license to launch Intelligence Reporting. In this environment, multiple connector licenses are recommended. You will need to request multiple Connector licenses from Sage. The number of Connector licenses you request is dependent on how many Terminal Server/Citrix boxes you have installed Sage 100 ERP Workstation (Intelligence Reporting). For example, if you have 3 load balanced servers you will need to request 3 Connector licenses.

Having each server containing a Sage 100 ERP Workstation (Intelligence Reporting) assigned a Connector license will allow all users to access all modules of Intelligence Reporting. User access to Intelligence Reporting from the Sage 100 ERP launcher menu can be enabled or restricted utilizing Sage 100 ERP 'Role Maintenance'.

From the 'Role Maintenance' menu click 'Tasks', then click 'Sage Intelligence Reporting'.

