

Sage 300 ERP

Intelligence Reporting

A decorative graphic in the upper right quadrant of the page. It features a large, dark green curved shape in the top right corner. Below it, several thin, light green curved lines sweep across the page. Scattered throughout this area are various sized circles and ovals in shades of green, ranging from light lime to dark forest green. Some circles are solid, while others are partially obscured by the lines or other shapes.

Citrix Environment Installation Guide

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Installation Guide

Introduction

This installation guide is intended to explain the process to be followed when attempting to setup Sage 300 ERP Intelligence Reporting on a Citrix XenApp/XenDesktop Load Balanced or Single Server Instance.

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

- Sage 300 ERP 6.0
- Sage 300 ERP 2012

Repository

The Sage Intelligence Reporting repository contains metadata and a database where Sage Intelligence stores reports, security rules, license details and other configuration. 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 Intelligence installed.

Licensing

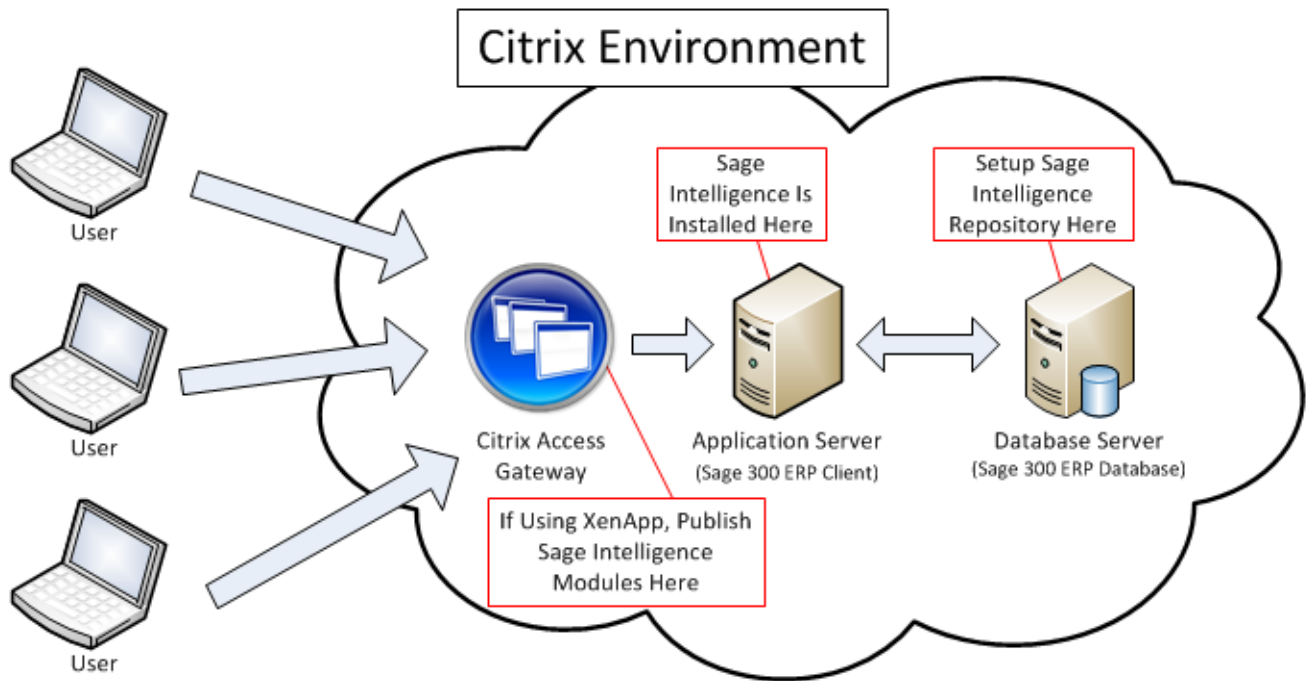
Sage 300 ERP Intelligence Reporting uses a user & workstation licensing model whereby licenses are assigned to a user and a workstation name. Two user/workstation license types are available to be assigned and offer varying degrees of access:

- **Report Manager License** – Enables access to Report Manager and Report Viewer
- **Report Viewer License** – Enables access only to Report Viewer

*Note the Connector and Report Designer licenses are not a workstation based license and will allow all workstations access to the Connector and Report Designer modules respectively once activated.

Sage 300 ERP

Single Client and Single Database Server Citrix Environment



Installation

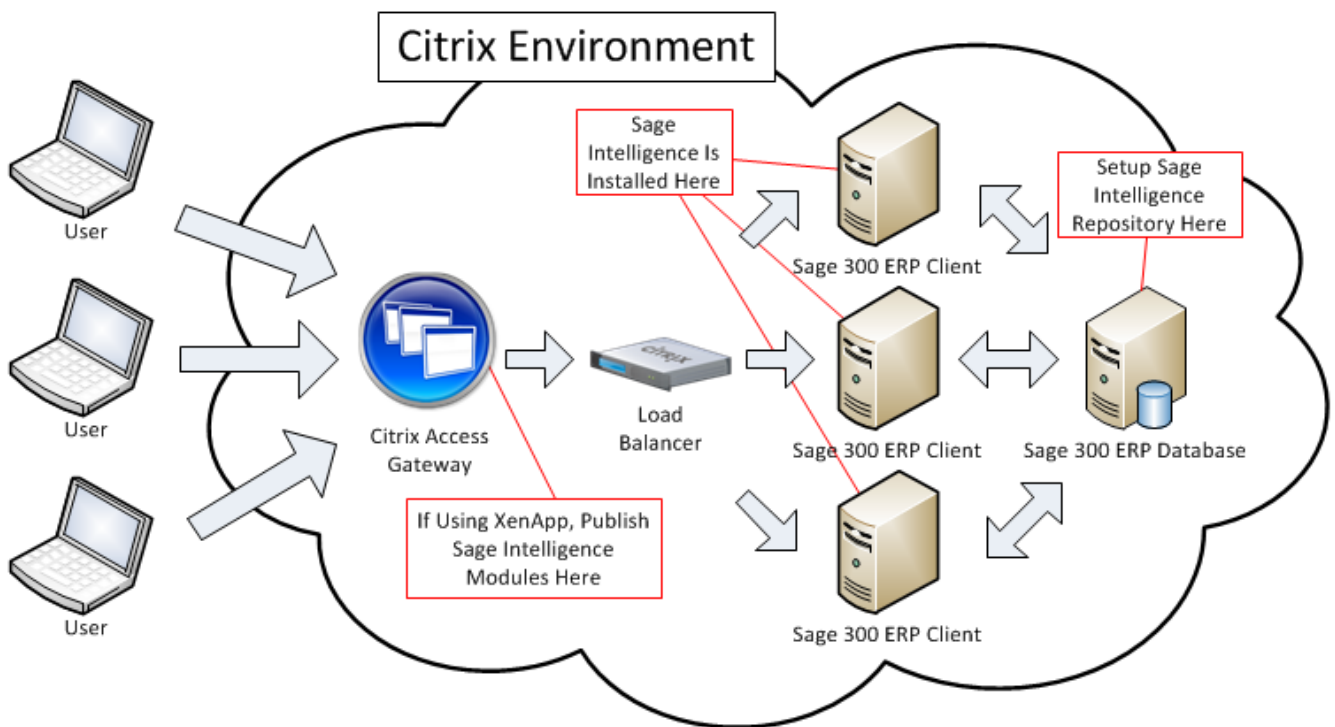
- Sage Intelligence is installed automatically with Sage 300 ERP.
- Register Sage Intelligence Reporting within the Sage 300 ERP installation on the application server using the Sage 300 ERP License Manager to activate the licenses you have purchased. You will only need to perform this step once.
- Setup the Sage Intelligence repository shared folder on a server which is accessible to the Application Server such as the Sage 300 ERP Database Server, ensure all Sage 300 ERP users have read/write access to this folder.

Licensing

As a Sage 300 ERP Intelligence Reporting license is assigned to a user and a workstation and there is only one workstation in this scenario, there are no special considerations when deploying licensing.

If you are using Citrix XenApp, be sure to only publish the Sage Intelligence modules which you want each user to access on the Access Gateway.

Load Balanced Citrix Environment



Installation

- Sage Intelligence is installed automatically with Sage 300 ERP.
- Register Sage Intelligence Reporting on each of the Sage 300 ERP installations (on each application server) using the Sage 300 ERP License Manager to activate the licenses you have purchased. You will only need to perform this step once on each Application Server.
- Setup the Sage Intelligence repository shared folder on a server which is accessible to the Application Servers such as the Sage 300 ERP Database Server, ensure all Sage 300 ERP users have read/write access to this folder.
- Launch Sage Intelligence on each Application Server, when launching for the first time, a prompt will appear requesting the location of the repository path, enter the full network location of the Sage Intelligence repository shared folder which was created.

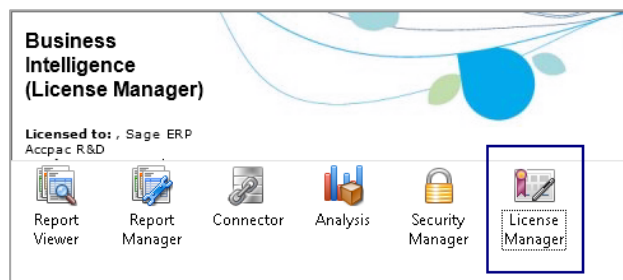
Licensing

Within a load balanced Citrix environment a user will be directed to any one of the available Application Servers based on the load of the Application Server. This section is split into two areas; Sage 300 ERP 6.0 and Sage 300 ERP 2012 as licensing behavior has been improved in Sage 300 ERP 2012.

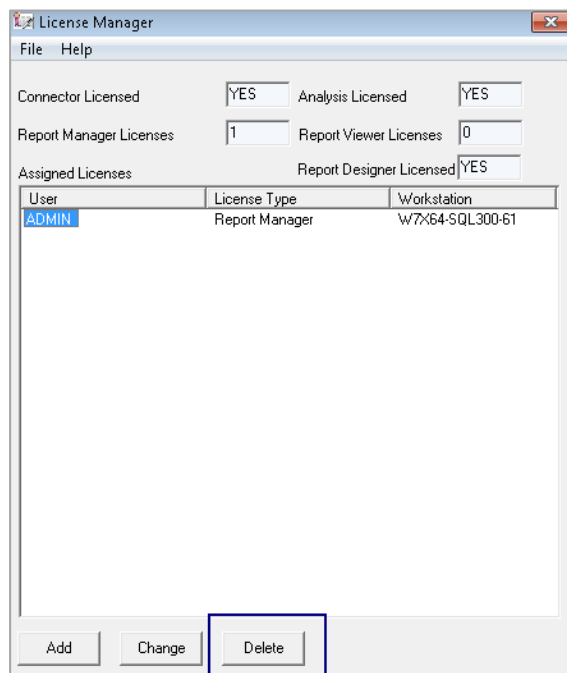
Sage 300 ERP 6.0

Deploying Sage 300 ERP 6.0 Intelligence Reporting on a load balanced Citrix environment requires a licensing workaround to function successfully. As licenses are assigned to a Sage 300 ERP user and a workstation name, within a load balanced environment there is the possibility that a user will login into a different workstation than what they were originally licensed for, preventing access to Sage Intelligence Reporting. In this case the user needs to open the License Manager module, remove the license listed against their name and then re-add their license again. The license manager will detect the current workstation and re-assign a license to the same user and new workstation name – this will need to be repeated for each instance where a user is prevented access via licensing.

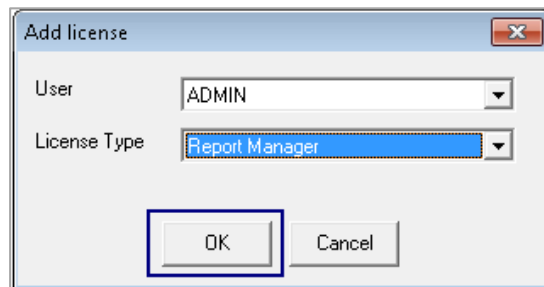
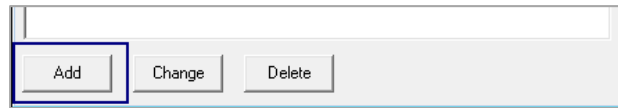
1. Launch License Manager:



2. Delete Existing License Assigned to User:



3. Add a New User License:



4. Complete, user will be licensed to the current workstation and will be able to access Sage Intelligence Reporting modules.

Sage 300 ERP 2012

As a Sage 300 Intelligence Reporting license is assigned to a user and a workstation, Sage 300 ERP 2012 Intelligence Reporting licensing have been improved and designed to automatically detect whether Terminal Services is activated within Windows and then ensure that each Sage 300 Intelligence Reporting user is allowed to access all application servers within the load balancing environment (i.e. licenses will not restrict users to single workstation when Terminal Services is detected).

If you are using Citrix XenApp, only publish the Sage Intelligence modules which you want each user to access on the Access Gateway.