

Sage 300 Construction and Real Estate  
***Sage Construction Central Setup Guide***  
***(Version 18.1)***

Certified course curriculum



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07/2018

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# Sage Construction Central

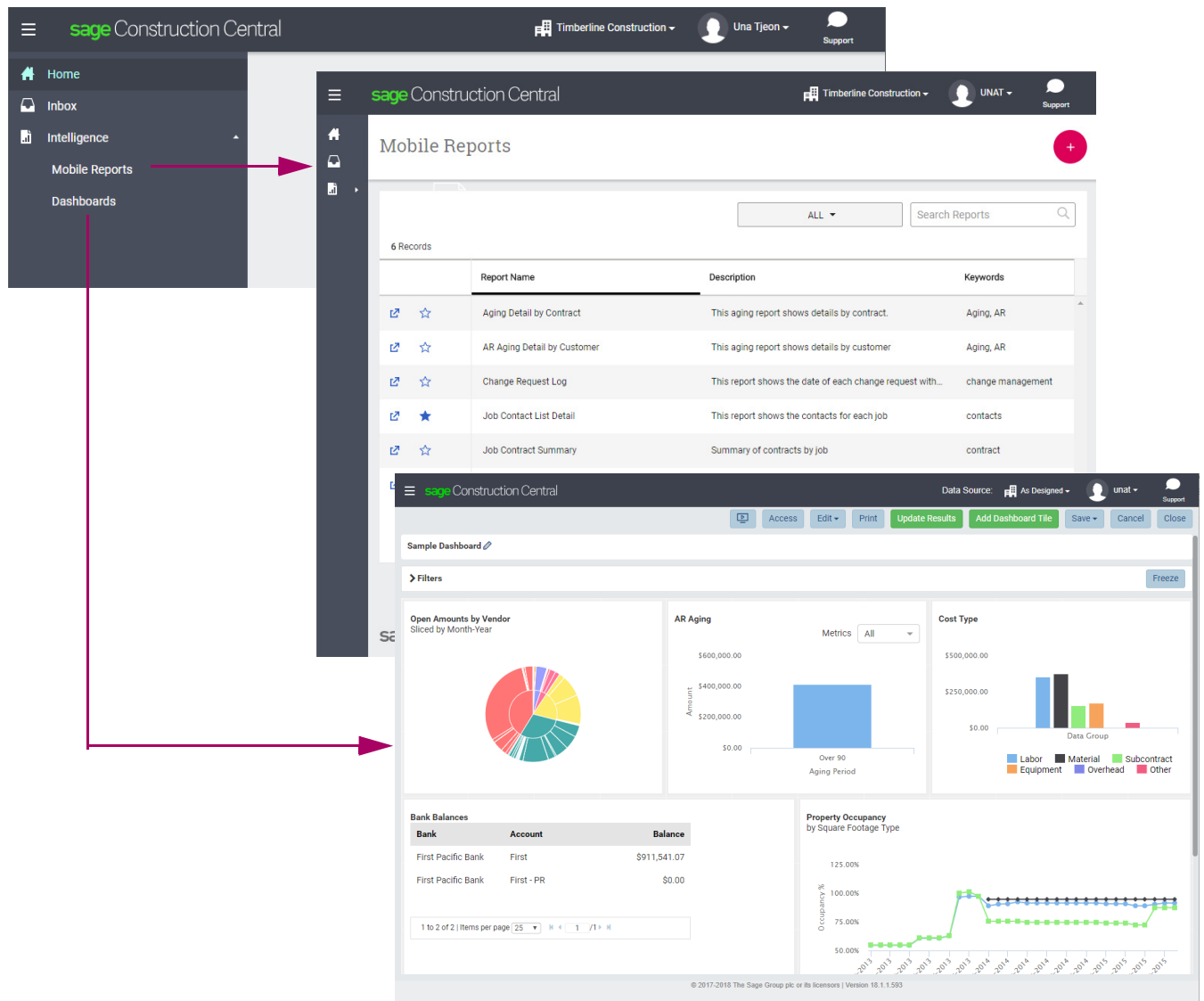
Take your business to the cloud with Sage Construction Central. You can now access your Sage 300 Construction and Real Estate data from anywhere, using any mobile device. Sage Construction Central is the website for your Sage Mobile Intelligence solutions: Mobile Reports and Mobile Dashboards.

## Mobile Reports

You don't have to be confined to your desk to access the information you need to run your business. Use Mobile Reports to generate and view reports designed in SAP Crystal Reports.

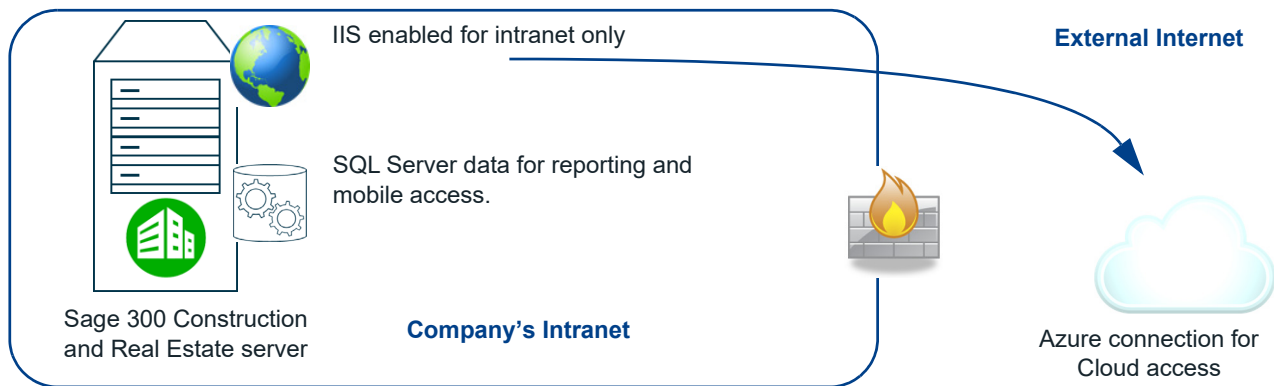
## Mobile Dashboards (Viewer or Designer)

Dashboards give you all the information you need at a glance—powerful data visualizations with information from different data sources in one location. You can use the report designer that comes with this mobile application to create reports for your dashboards or use the ones that Sage provides.



# Sage SQL Replicator

Sage SQL Replicator lays the foundation for Sage Construction Central. It copies your Sage 300 Construction and Real Estate data from a Pervasive data management system into SQL Server, and configures IIS (Internet Information Services) on your server to host Sage Construction Central.



The replication process works in the background, which means you can work in the Sage on-premises and mobile solutions without interruption. You can choose to use continuous synchronization and always get up-to-the-minute information, or set up the replication to occur based on a schedule.

## Requirements

To begin using your Sage Mobile solutions, you must:

- Upgrade to Sage 300 Construction and Real Estate version 18.1 or higher.
- Acquire the appropriate software licenses and allocate them to your users.
- Use Sage SQL Replicator to copy your Sage 300 Construction and Real Estate company data from the Pervasive data management system into a SQL Server database.
- Deploy your company's Sage Construction Central website through Microsoft Azure Cloud Services.



**NOTE:** To acquire software licenses, contact your Business Partner or Sage Customer account manager at (800) 858-7095 or [CRESales@sage.com](mailto:CRESales@sage.com). Your Sage Mobile Intelligence solution comes with license of Microsoft Azure Active Directory Basic account.

## About this guide

This reference guide explains the configuration needed to implement your Sage Construction Central website and Mobile applications. Topics include:

- How to allocate Mobile software licenses to users.
- The required setup in Sage 300 Construction and Real Estate Security Administration.
- How to publish your Sage Construction Central website through Microsoft Azure Cloud Services.
- Getting started in your Mobile applications.



**NOTE:** This guide does not include instructions for replicating your Pervasive data into SQL Server, a required step for Sage Construction Central. To learn how to set up, configure, and use Sage SQL Replicator, download the Sage SQL Replicator Setup Guide from the [Product Documents web page](#).

# Set up Sage Construction Central users

Software licenses for Mobile features are user-specific. You use Sage 300 Construction and Real Estate Security Administration to set up users and grant permissions, and then use License Administration to allocate licenses to your users.

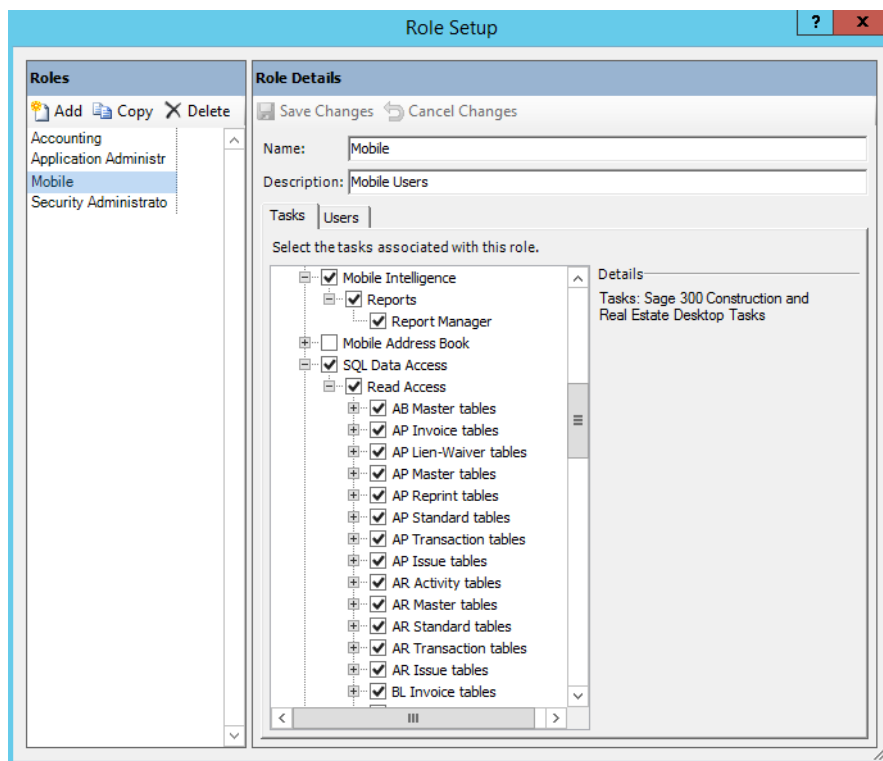
## Sage 300 Construction and Real Estate Security Administration



**FOR MORE INFORMATION:** To learn how to use Security Administration, refer to the User's Guide posted on the [Product Documents website](#).

### Roles

On existing roles or new roles, define which Mobile tasks are allowed.



When selecting Mobile task(s), consider the following:

- **SQL Data Access** is required for Mobile Reports and Mobile Dashboards.
- The tasks under **Mobile Intelligence** are associated with Mobile Reports. **Reports** lets you generate and view reports. **Report Manager** lets you add reports and make them available to users.

## Users

Set up users and associate them with roles that have permissions to Mobile tasks. You must also enter the Windows name for each user because Sage Construction Central requires you to log on with Windows credentials.

The screenshot shows the 'User Setup' dialog box. On the left, there is a table with columns 'User Name' and 'Full Name'. The table contains the following data:

User Name	Full Name
App	Application Admin
ChrisK	
KimD	Kim D
unat	Una Tjeon
WendyS	

On the right, the 'User Details' section has the following fields:

- User name: KimD
- Full name: Kim
- Windows user: best\KimD (Domain\user name)

A pink box highlights the 'Windows user' field.

## Security by Company and Records

In addition to task security, you can limit the companies, files, and records (specific prefixes, bank accounts, or jobs) that a user can access. This type of security is enforced when accessing the data in Sage Construction Central.



**WARNING:** During the initial replication, Sage SQL Replicator copies all the security settings from Sage 300 Construction and Real Estate into SQL Server. If you change any security settings after the initial replication is completed, you must synchronize the security between the Pervasive and SQL Server databases—in **System Administrator > Replicator Configuration** tab, click **Sync Security**.



# License Administration

In order to activate licenses, your server must have access to the Internet. If your organization's policy requires servers to be blocked from the Internet, you can disconnect it immediately after you activate your license.

License Administration connects to the Sage licensing system at least once a year to verify that licenses are still active. If your server is generally not connected to the Internet, your licenses could expire after one year. To reactivate licenses, contact Support through one of the means described in the Knowledgebase article [17540](#).

Please be aware that:

- For Mobile Dashboards, your organization needs to have at least one license of Mobile Dashboard Designer.
- Mobile licenses are assigned to specific Sage 300 Construction and Real Estate user IDs, each mapped to a Windows ID.



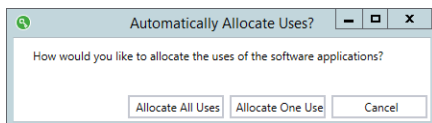
**NOTE:** To acquire software licenses, contact your Business Partner or Sage Customer account manager at (800) 858-7095 or [CRESales@sage.com](mailto:CRESales@sage.com).

## ▶ Activate and assign mobile licenses

1. Log on to your accounting server as a local administrator.
2. On the Windows Home page, in the **Sage Administration** group, click **License Administration**. In the **Sage 300 Construction and Real Estate - Log On** window, enter the credentials of an Application Administrator.
3. Enter your organization's information in the **Sage Client ID** and **Registration Name** boxes.

The screenshot shows the Sage Administration interface. On the left, the 'Sage Administration' menu is visible, with 'License Administration' highlighted. A red arrow points from this menu item to the 'License Administration' window. The window title is 'License Administration' and it displays 'sage 300 Construction and Real Estate'. The 'Registration information' section includes fields for Sage Client ID, Registration Name, Country (United States), Version (17.1.10 Rev 10), Service Plan Expiration (12/29/3000), and System ID (BXPUVUBK). Below this, there are buttons for 'Save and Update', 'Deauthorize Server', and 'Advanced Options'. The 'Licenses' section contains a table with columns: Application, Allocated Uses, Unallocated Uses, Total Uses, Type, and Expiration. Above the table are buttons for 'Allocate All Uses', 'Allocate One Use', and 'Update'.

4. Click **Save and Update**. Allocate uses based on your organization's needs.



- On the **Licenses** tab, scroll down the list to locate the Mobile applications. If needed, you can change the use allocation by changing the number in the **Allocated Uses** column.

The table on this tab shows information about the uses for each application. You can manually change the number of allocated uses by typing in that column and clicking [Update]. To automatically allocate all uses for all applications, click [Allocate All Uses]. To automatically allocate one use for all applications, click [Allocate One Use].

Allocate All Uses    Allocate One Use    Update

Application	Allocated Uses	Unallocated Uses	Total Uses	Type	Expiration
MICR Check Printing	1	0	1	Subscription	11/1/3000
Mobile Dashboard Designer	3	6	10	Subscription	12/2/3000
Mobile Dashboard Viewer	5	4	10	Subscription	12/2/3000
Mobile Projects	0	9	10	Subscription	11/1/3000
Mobile Reports	4	5	10	Subscription	11/1/3000
Payroll	1	8	10	Subscription	11/1/3000
PR Time Entry	1	0	1	Subscription	11/1/3000
Project Management	1	8	10	Subscription	11/1/3000

- Click **Mobile Licenses** to assign licenses to specific users.
- Click the plus symbol next to a Mobile application to expand it, and then click **Add User**. Enter the Sage 300 Construction and Real Estate user name or click the ellipsis to select a user from the list.

The table on this tab shows information about the uses for each mobile application. Click the + sign next to the application name to see the user names of people authorized to use that application. If you add or remove users, click [Update] to save your changes.

Update

Application	Assigned Uses	Allocated Uses	Unallocated Uses	Total Uses	Type	Expiration
Mobile Dashboard Designer	3	3	6	10	Subscription	12/2/3000
Mobile Dashboard Viewer	2	5	4	10	Subscription	12/2/3000
Mobile Projects	0	0	9	10	Subscription	11/1/3000
Mobile Reports	3	4	5	10	Subscription	11/1/3000

Users

<input type="checkbox"/> unat	X
<input type="checkbox"/> ChrisK	X
<input type="checkbox"/> KathyK	X

Add User    Remove Selected Users

The table on this tab shows information about the uses for each mobile application. Click the + sign next to the application name to see the user names of people authorized to use that application. If you add or remove users, click [Update] to save your changes.

Update

Application	Assigned Uses	Allocated Uses	Unallocated Uses	Total Uses	Type	Expiration
Mobile Dashboard Designer	3	3	6	10	Subscription	12/2/3000
Mobile Dashboard Viewer	2	5	4	10	Subscription	12/2/3000
Mobile Projects	0	0	9	10	Subscription	11/1/3000
Mobile Reports	3	4	5	10	Subscription	11/1/3000

Users

<input type="checkbox"/> unat	X
<input type="checkbox"/> ChrisK	X
<input type="checkbox"/> KathyK	X
<input type="checkbox"/>   ...	X

Add User    Remove Selected Users

- Click **Update** to save your changes.

# Deploy your Sage Construction Central website

To access your Sage 300 Construction and Real Estate information from the Cloud, the data must be replicated into SQL Server through Sage SQL Replicator. If you have not already replicated your data, use the instructions from the document called Sage SQL Replicator Setup Guide posted on the [Product Documents web page](#).

Once your data has been replicated, you can follow the instructions in this chapter to test the Sage Construction Central website, and then deploy the website through Microsoft Azure Cloud Serves.



**WARNING:** To use the Sage Construction Central site securely, you must set up the Azure Active Directory site as explained starting on page 13.

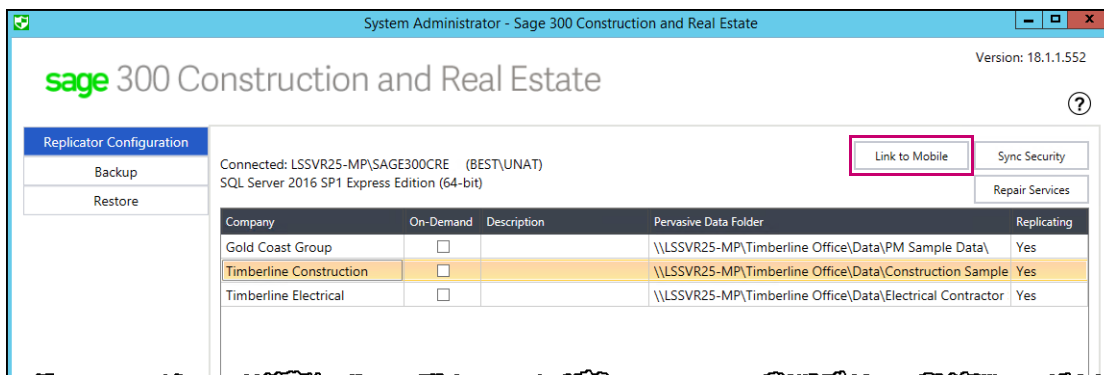
## Link to Mobile

1. Follow the instructions in the Sage SQL Replicator Setup Guide to replicate your data.



**WARNING:** For continuous synchronization between the Pervasive and SQL Server databases, clear the **On-Demand** check box for the company in **System Administrator > Replication Configuration** tab. This ensures that information is continuously updated in your on-premises Sage applications and in Sage Construction Central.

2. In System Administrator, click **Link to Mobile** if you have not already done so. This links Sage Construction Central to your SQL Server instance.



**NOTE:** The Sage Construction Central web site is available as soon as the initial replication is done. An error message appears if you try to access the site before the replication is finished.

# Test your Sage Construction Central website



## NOTES:

- Before you can log on to Sage Construction Central, your company's data must have finished replicating.
- The Sage Construction Central site uses port number 8080 by default.
- By default, Windows servers have Enhanced Security enabled for Internet Explorer. If you want to use Internet Explorer to verify the Sage Construction Central website from the accounting server, you'll need to disable it. See the following link for more information:  
<https://prajwaldesai.com/disable-ie-enhanced-security-in-windows-server-2012-r2/>

Test the Sage Construction Central website by browsing to it from inside your network to verify your data. The URL for this site requires you to know the fully qualified domain name for your server. The URL follows this pattern:

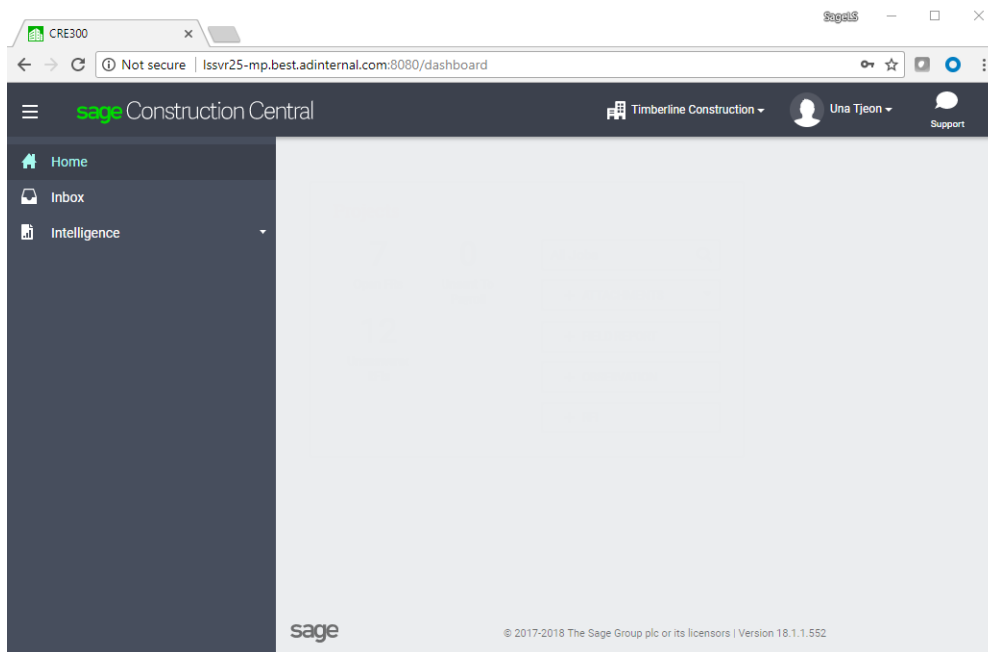
`http://FullServerName:8080.`

For example, if your server is `sageserver.example.com`, the URL is `http://sageserver.example.com:8080`.

Open a browser and go to your Sage Construction Central site. You'll be required to enter the Windows credentials for one of the users you added in Sage 300 Construction and Real Estate Security Administration. See "Users" on page 8.



**WARNING:** Use this internal URL (`http://`) for testing only. To use the Sage Construction Central site securely, you must set up the Azure Active Directory site as explained starting on page 13.



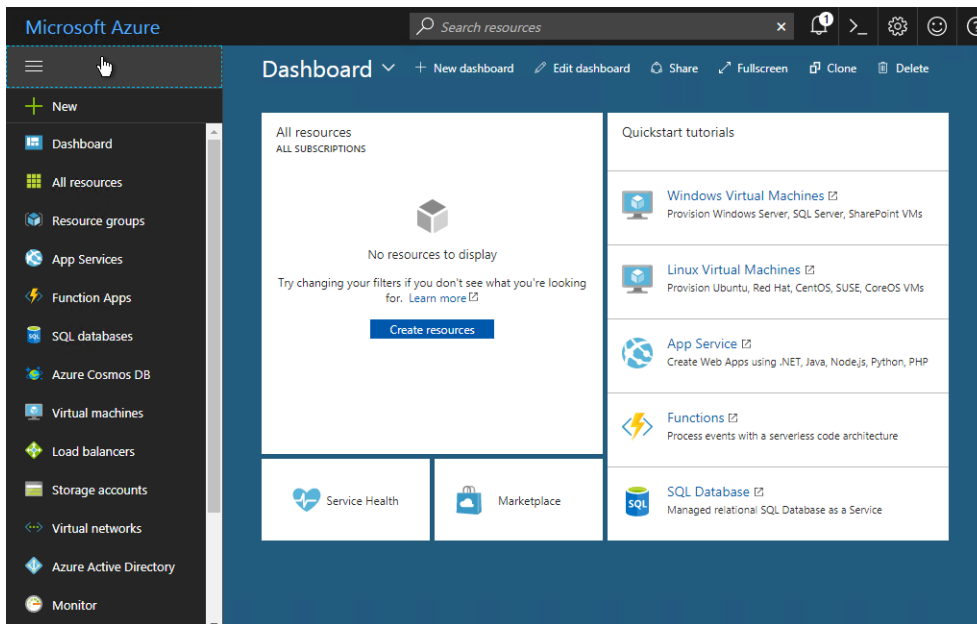
# Publish your Mobile website through Microsoft Azure

For individuals to access Sage Construction Central through a secure connection, you must configure a Microsoft Azure application to connect to your accounting server. To do this, you need an Azure Active Directory Basic account, which is provisioned for you automatically when you purchase a subscription to any Mobile feature.

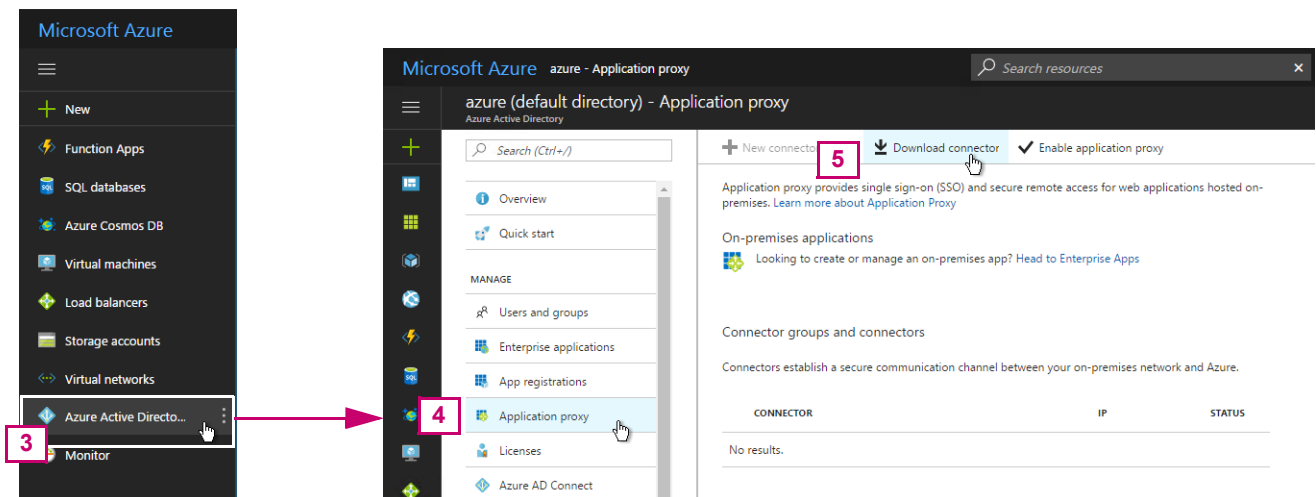


**NOTE:** Azure Active Directory Basic accounts are provisioned based on your country: the United States, Canada, or Australia.

1. From your accounting server, open an Internet browser and go to <https://portal.azure.com>. Sign in if needed.
2. If you are asked to change a temporary password, supply the Microsoft account credentials that you received in your welcome email. Be sure to record this information once you enter the new password.



3. On the left, click **Azure Active Directory**.
4. In the next window, click **Application proxy**.
5. Click **Download connector**.



- Review the information on the connector download page. Your accounting server should already be on a supported operating system.



## Azure AD Application Proxy Connector Download

Download and install the Application Proxy connector to enable a secure connection between applications inside your network and the Application Proxy. Only one installation is necessary to service all your published applications; a second connector can be installed for high availability purposes.

### System Requirements

- Operating systems:
  - Windows Server 2012 R2
  - Windows Server 2016
- Make sure the connector's communication with the Application Proxy is not blocked by a firewall. To check that all required ports are open, please try our [port check tool](#).
- The connector must have access to all on premises applications that you intend to publish

Work with your system administrator to ensure the necessary ports are open to outbound traffic.

### Installation Instructions

To install the Application Proxy connector, download the connector installation package and install it on a local, designated machine.

### Related Resources

For more information on the Application Proxy connector, see [our online content](#).

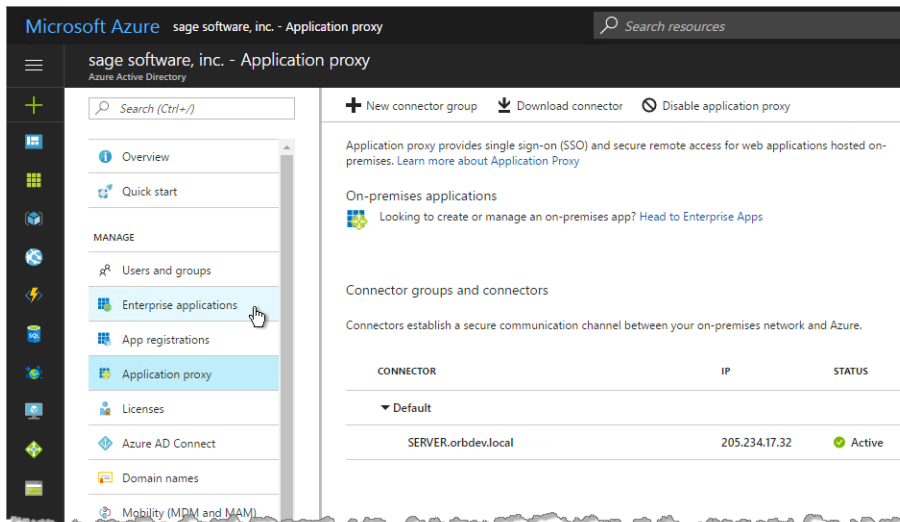
[I accept the license terms and privacy agreement](#)

[Download](#) (64 bit version)



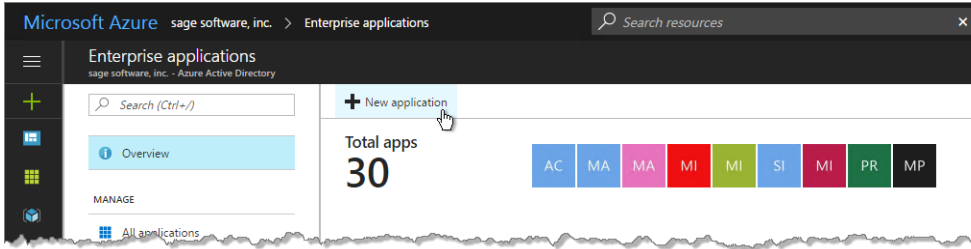
**FOR MORE INFORMATION:** The outbound ports required for the application proxy are described in the Microsoft article [Get started with Application Proxy and install the connector](#).

- Accept the license agreement, click **Download**, and follow the instructions to install the connector.
- When the installation is finished, return to the Azure portal page (<https://portal.azure.com>) and refresh it. You'll see your connector associated with your accounting server. This means the connection was successful. Now you'll publish your Sage Construction Central website to Azure.



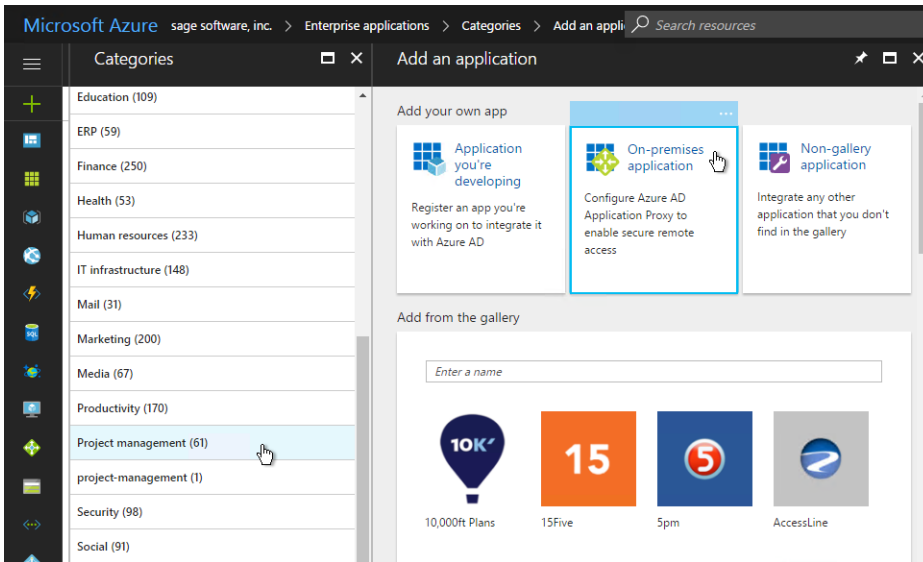
- On the left, click **Enterprise Applications**.

10. Click **New application**.

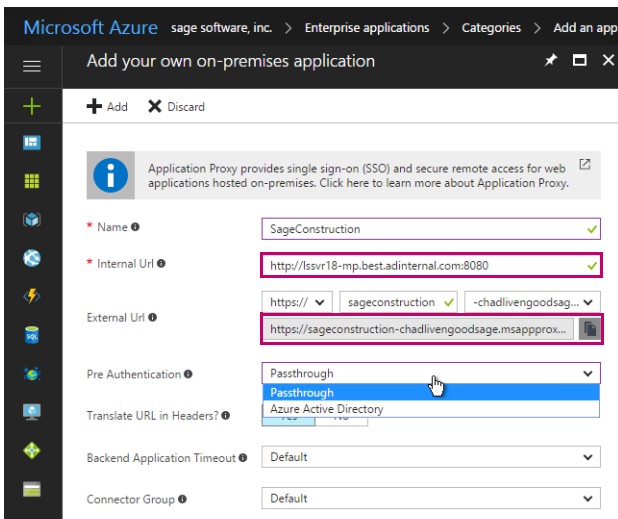


11. Select a category; you can choose any category you want. In this example, we chose **Project Management**.

12. Click **On-premises application**.



13. Enter a display name for your application. This can be your company name or some other name that makes sense to your employees. This example shows a company called **Sage Construction**:



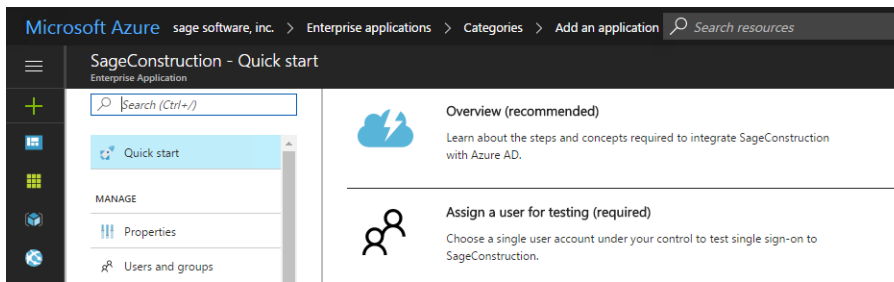
**Internal Url** is your server's name followed by a colon (:) and the port number (usually **8080**).

**External Url** is the public, Internet address for your Sage Construction Central site.

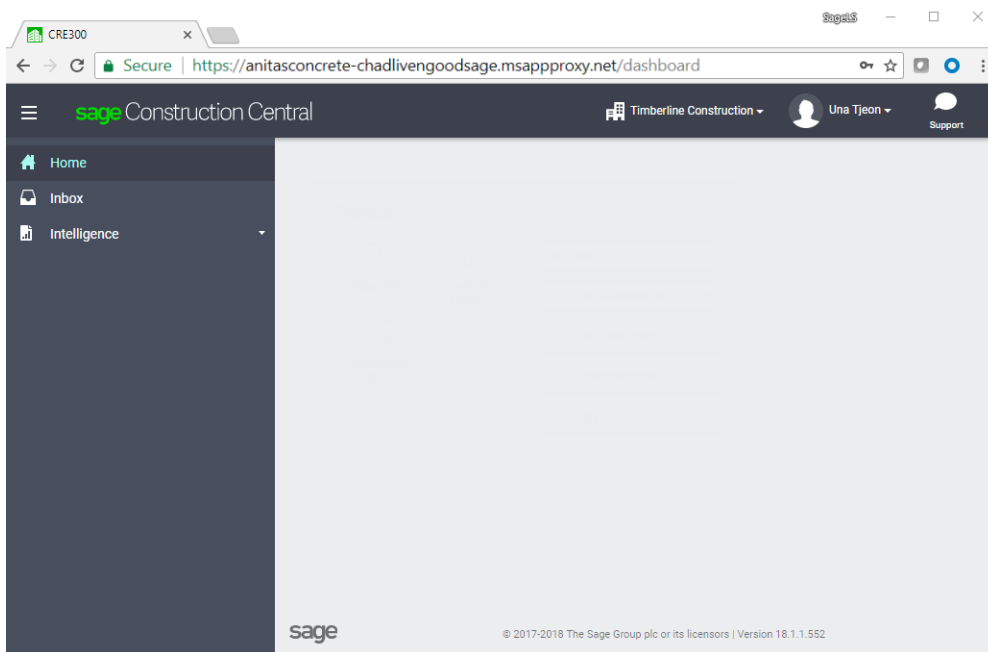
14. For the **Internal Url**, enter the URL you established for your site on page 12. This entry must include the port, **:8080**, as part of the address. For example, if your server is `sageserver.example.com`, the internal URL is `http://sageserver.example.com:8080`.

Notice that the public URL for your site will be a combination of the entries in the window above:  
`https://applicationname-accountname.msapproxy.net`

15. For **Pre Authentication**, select **Passthrough**. You can leave the remaining options as they are.
16. Click **Add**. After the application is created, you're taken to the **Enterprise Application** page. You don't need to modify anything else in this window.



17. Open the URL in a browser to make sure it's connected.



## Go live with Sage Construction Central

After you successfully publish your Mobile website through Microsoft Azure Cloud Services, you are ready to go live with Sage Construction Central.

Notify Mobile users to let them know:

- The external, secure URL (<https://>) for accessing Sage Construction Central.
- That they must log on using their Windows credentials (associated with their Sage 300 Construction and Real Estate user setup).



# Mobile Reports

Mobile Reports lets you access the information to run your business without being confined to your office. You can generate reports from anywhere, using any mobile device.

- When you generate reports, you can select a PDF or an Excel spreadsheet format.
- You can view reports on your screen or download them to your device.



**TIP:** In order to view a report on your screen, you must set your browser to allow pop-ups for your Sage Construction Central web address.

- You can send reports by email.



**FOR MORE INFORMATION:** See “Learn how to use Mobile Reports” on page 23 to find out about training on Sage University.

Report Name	Description	Keywords
Accounts Receivable Aging by Customer	Run this report every week.	Aging
Change Order Profit Analysis	Run this report each week.	Change orders
Job Contract Summary (CR)		Jobs

Please note the following about the reports you can use in Mobile Reports:

- Only report designs created in SAP Crystal Reports are supported.
- You can use new or existing reports that are based on a Sage 300 Construction and Real Estate Pervasive data source or a SQL Server data source (it must be data replicated by Sage SQL Replicator).
- When you use a report design based on a Pervasive data source, Sage Construction Central automatically switches the data source on the report to use the replicated data stored in SQL Server.



**TIP:** Before you add the report to the Mobile Reports menu, verify that it generates successfully with the **Use SQL** check box selected in Sage 300 Construction and Real Estate.

# Access to Mobile Reports

To generate and view reports, Mobile Reports users must have permissions to the following tasks in Sage 300 Construction and Real Estate Security Administration:

- **Mobile Intelligence > Reports.**
- **SQL Data Access**—allow all database tables or limit the ones that users can access.

In your organization, you must have at least one individual who has permissions to **Mobile Intelligence > Reports > Reports Manager** in addition to **SQL Data Access**. This allows the individual to add reports to the Mobile Reports menu and grant access to other users.



**FOR MORE INFORMATION:** See “Sage 300 Construction and Real Estate Security Administration” on page 7 and “License Administration” on page 9.

**Role Setup**

**Roles**

- Add
- Copy
- Delete
- AP Role
- Application Administra
- JC Role
- Mobile Role
- Reports Role
- Security Administrator

**Role Details**

Save Changes Cancel Changes

Name: Mobile Role

Description: Mobile Role

Tasks Users

Select the tasks associated with this role.

- Document Management
- Equipment Cost
- Financial Statements
- General Ledger
- Information Assistant
- Inquiry Designer
- Job Cost
- ODBC
- Reports and Inquiries
- Payroll
- Project Management
- Property Management
- Remote Time
- Report Designer
- Service Management
- Mobile Projects
- Mobile Intelligence
  - Reports
    - Report Manager
- Mobile Address Book
- SQL Data Access
- APIs

**Allows you to generate and view reports.**

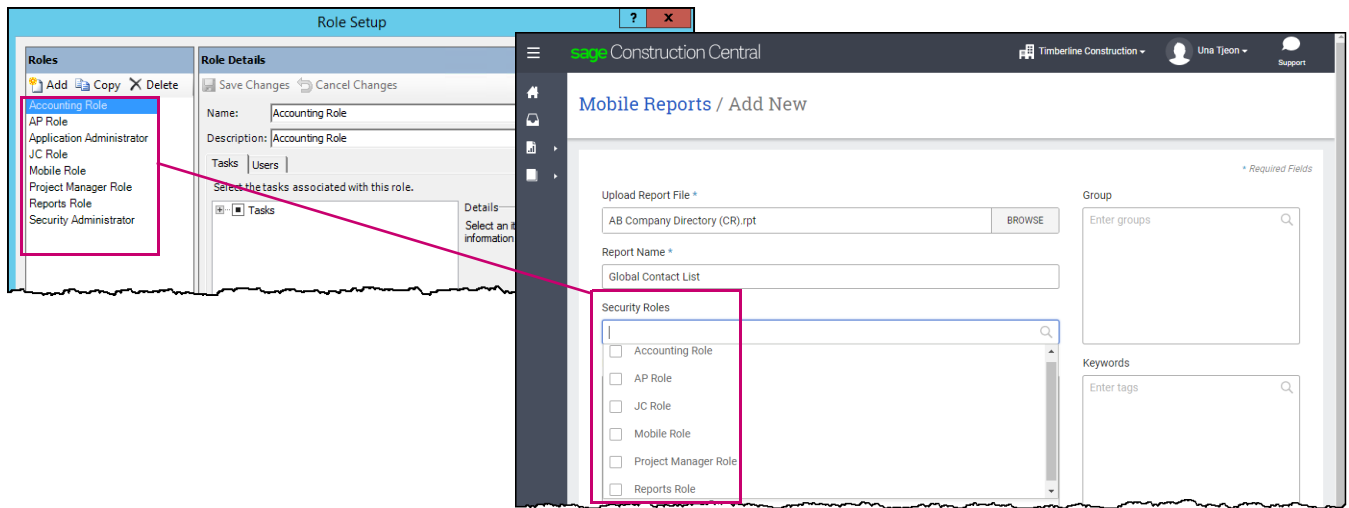
**Allows you to manage reports on the Mobile Reports menu.**

**Allows data access on reports.**

**Details**

Tasks: Sage 300 Construction and Real Estate Desktop Tasks

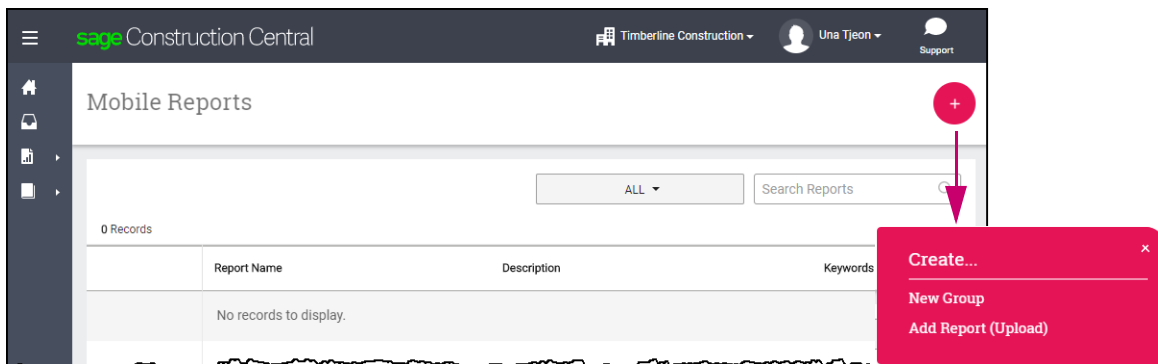
You can use Sage 300 Construction and Real Estate Security Administration roles to limit report access in Mobile Reports. See step 5 of “Add reports to Mobile Reports menu” on page 19.



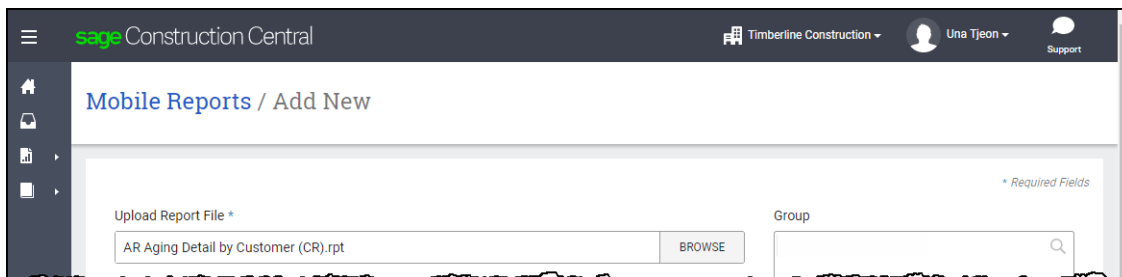
## Add reports to Mobile Reports menu

The instructions below explain how to add reports, grant access to others, and organize the reports in Mobile Reports. To perform these functions, your Sage 300 Construction and Real Estate user setup must be assigned to a role that has permissions to **Mobile Intelligence > Reports > Reports Manager**.

1. In the Sage Construction Central Home page, select **Intelligence > Mobile Reports** from the menu.
2. On the Mobile Reports page, click the plus symbol and click **Add Report (Upload)**.



3. In the **Add New** page, under **Upload Report File**, click **Browse** to locate the report design (\*.rpt) file from your local machine or from a location on your network. When you save this page, the file will be uploaded and copied to the SQL Server database.



4. The **Report Name** is the name that will display in the Mobile Reports menu for users. Accept the existing name or enter a new one.
5. You can use **Security Roles** to limit the reports that users can access. Click in the box and select one or more roles from the list. Alternatively, type the name of the role. You must use a role that is already set up in Sage 300 Construction and Real Estate Security Administration.
6. For **Description** and **Instructions**, describe what this report is for and how to run it.
7. You can categorize reports into one or more groups. Click in the box under **Group** and enter a group name. Click **Add** to add an item.
8. You can use one or more keywords to tag a report. Click in the box under **Keywords** and enter the text. Click **Add** to add an item.



**NOTE:** Users can limit the reports shown on the Mobile Reports page by using the **Group** filter and **Keywords**. The Search box on the Mobile Report page searches for matching text in the **Keywords**, the **Report Name**, and **Description** columns.

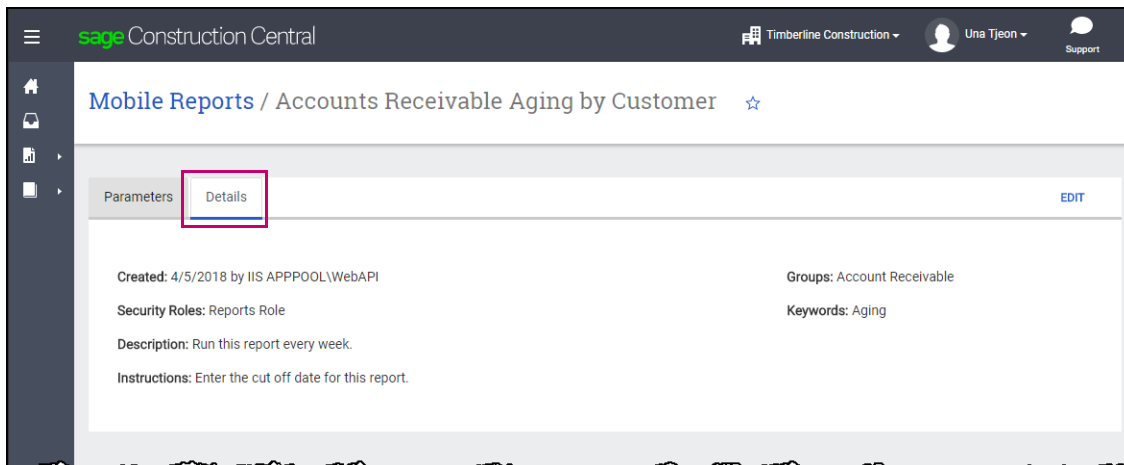
The screenshot shows the 'Add New Mobile Report' form in Sage Construction Central. The form is titled 'Mobile Reports / Add New' and includes the following fields and sections:

- Upload Report File \***: A text input field containing 'AR Aging Detail by Customer (CR).rpt' and a 'BROWSE' button.
- Report Name \***: A text input field containing 'Accounts Receivable Aging by Customer'.
- Security Roles**: A search box containing 'Reports Role'.
- Description**: A text area containing 'Run this report every week.'
- Instructions**: A text area containing 'Enter the cut off date for this report.'
- Group**: A search box containing 'Account Receivable'.
- Keywords**: A search box containing 'Aging'.

At the bottom right of the form, there are two buttons: 'CANCEL' and 'SAVE'.

9. Click **Save**.

10. Click the **Details** tab to view the information that you just entered. If needed, click **Edit** to make changes.

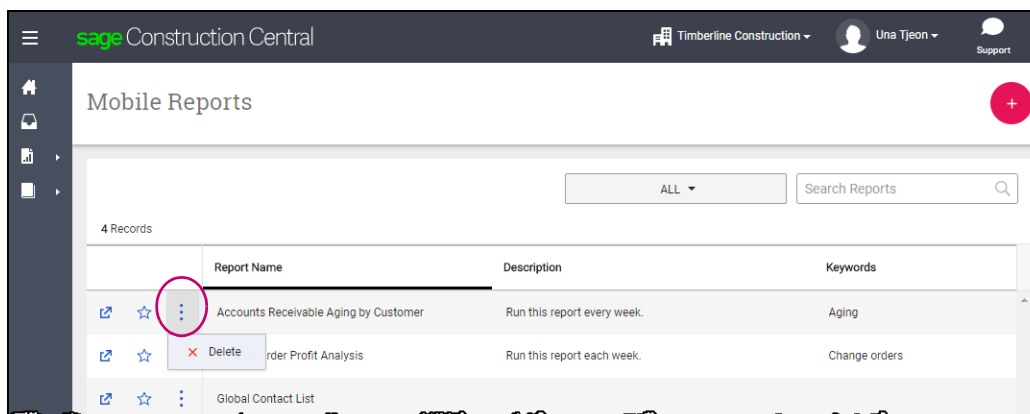


## Manage reports in Mobile Reports

To edit or delete reports from Mobile Reports, your Sage 300 Construction and Real Estate user setup must be assigned to a role that has permissions to **Mobile Intelligence > Reports > Reports Manager**.

### Delete a report

On the **Mobile Reports** page, find the report that you want to remove from the list. Click the ellipsis next to it and click **Delete**.



## Edit a report

On the **Mobile Reports** page, click the Open icon to open the report. When the report page opens, click the **Details** tab and click **Edit**.

The top screenshot shows the 'Mobile Reports' page in Sage Construction Central. It features a table with 4 records. The first record, 'Accounts Receivable Aging by Customer', is highlighted with a red box around its 'Open' icon (a square with a plus sign). A red arrow points from this icon to the 'EDIT' button in the second screenshot.

The second screenshot shows the 'Accounts Receivable Aging by Customer' report details page. The 'Details' tab is selected, and the 'EDIT' button is highlighted with a red box. The page displays the following information:

- Created:** 4/5/2018 by IIS APPPOOL\WebAPI
- Security Roles:** Reports Role
- Description:** Run this report every week.
- Instructions:** Enter the cut off date for this report.
- Groups:** Account Receivable
- Keywords:** Aging

Make changes on **Details** tab as needed and click **Save** when you are done.



**WARNING:** If you edited the report design, upload the file again to replace the one stored in the SQL Server database.

- To remove the report from the Mobile Reports menu, click **Delete Report**.
- Click **Download RPT** if you want to download a copy of the report design to your machine or device.

The screenshot shows the 'Instructions' tab of the report design editor. It features a text input field with the instruction 'Enter the cut off date for this report.' Below the field are four buttons: 'DOWNLOAD RPT', 'DELETE REPORT', 'CANCEL', and 'SAVE'. The Sage logo and version information are visible at the bottom.

## Learn how to use Mobile Reports

You can learn how to use Mobile Reports by watching complimentary, short instructional videos posted on Sage University ([www.sageu.com](http://www.sageu.com)). On the Sage 300 Construction and Real Estate product page, find **Mobile Access** under **Training subjects**. Or, type “Mobile Intelligence” in the Search box.

# Mobile Dashboards

In Mobile Dashboards, each dashboard is a collection of visualizations that provide insight into your company's overall performance and trends. You can use the report designer that comes with it to create reports for your dashboards or use the ones that Sage provides.



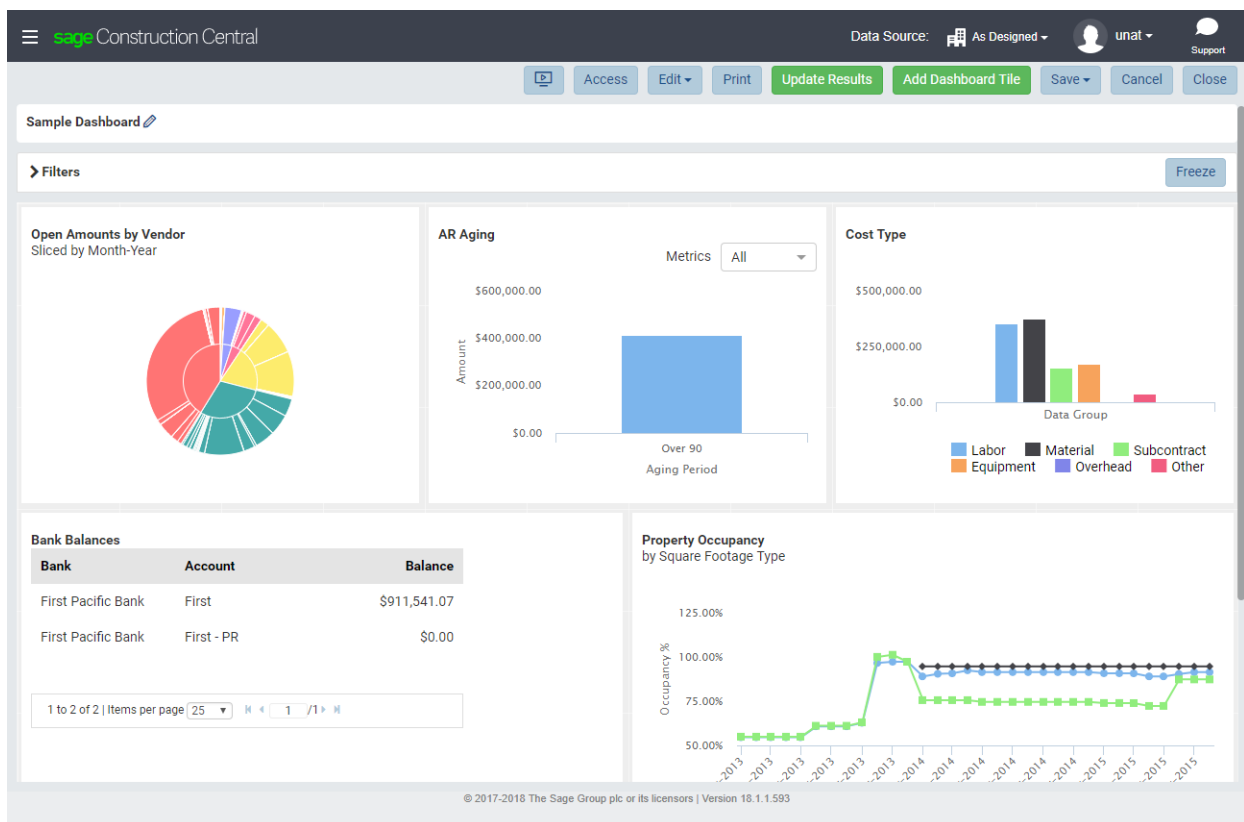
**FOR MORE INFORMATION:** For a list of Sage reports and their description, refer to the Release Notes and Mobile Dashboards Help (Sage Construction Central: **Support > Help**).

## About dashboards and dashboard reports

Your Mobile Dashboards application is made up of **dashboard reports**, **reports parts**, and **dashboards**.

The **dashboard report** defines where the information comes from. It is where the data source (the company database in SQL Server) and database views are specified. How the information is displayed in terms of visualization is a **report part**, which can be one of these types: Grid, Gauge, Map, Form, and Chart. You can have any number of report parts for a report.

A **dashboard** is a collection of report parts from different dashboard reports, showing you information from different data sources.



**NOTE:** For devices with a display resolution of 1024 pixels and below, the dashboard tiles appear stacked instead of side by side. This screen resolution does not support editing or creating dashboards or dashboard reports.

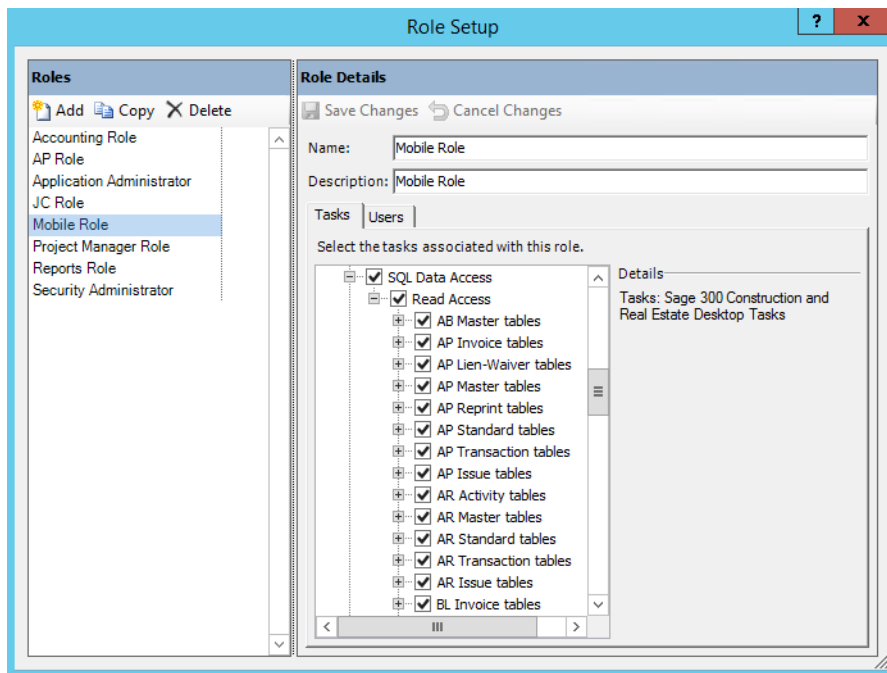


# Access to Mobile Dashboards



**FOR MORE INFORMATION:** See “Sage 300 Construction and Real Estate Security Administration” on page 7 and “License Administration” on page 9.

In Sage 300 Construction and Real Estate Security Administration, Mobile Dashboard users must have permissions to **SQL Data Access**. You can allow all database tables or limit the ones that users can access.



A user's software license determines the features that are available:

- Mobile Dashboard Viewer lets you view dashboards and individual reports.
- Mobile Dashboard Designer lets you:
  - Create and manage dashboards.
  - Use the Report Designer to create and edit dashboard reports and the associated report parts.
  - Use security to limit the reports and dashboards that users can access.
  - Use **Import Sage Reports** to copy Sage reports into your SQL Server database.
  - Use the **Synchronize** function. This process is required for the initial setup.

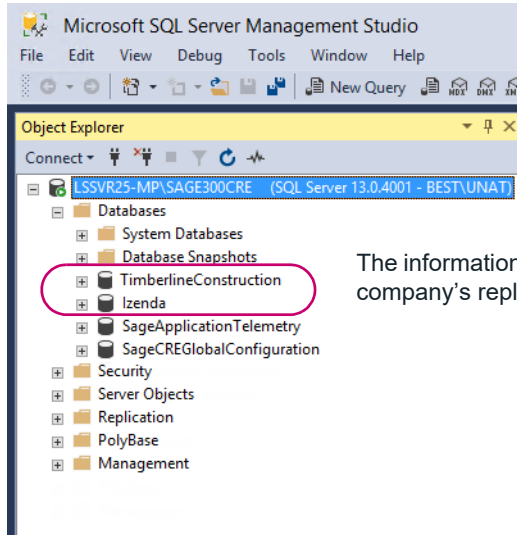
There must be at least one individual in your organization with a license of Mobile Dashboard Designer.



**WARNING:** To use the **Synchronize** function, the user with the Mobile Dashboard Designer license must also have the **Application Administrator** role in Sage 300 Construction and Real Estate and a **sysadmin** role for your SQL Server database.

# Implement Mobile Dashboards

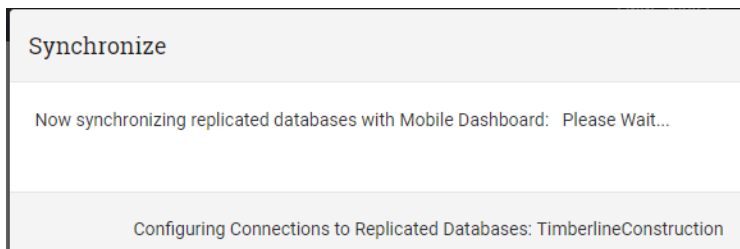
The initial setup involves the **Synchronize** process which must occur before you can use Mobile Dashboards. The **Synchronize** process creates the Izenda schema, copying over the data model and stored procedures from your company's replicated data. Mobile Dashboards relies on both your company's replicated database(s) and the Izenda database stored in SQL Server to generate information.



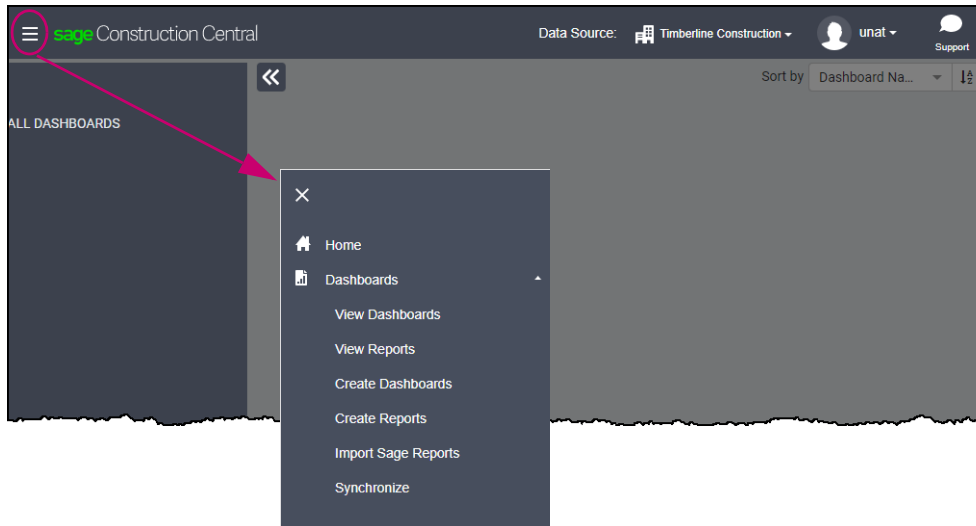
The information you see in Mobile Dashboards comes from your company's replicated database(s) and the Izenda database.

The **Synchronize** process takes place automatically when a user with the appropriate credentials opens Mobile Dashboards for the first time. You must have:

- A license of Mobile Dashboards Designer.
  - An **Application Administrator** role in Sage 300 Construction and Real Estate.
  - The SQL Server **sysadmin** role.
1. Log on to your Accounting server to access the Sage Construction Central website locally—in your web browser, type:  
localhost:8080/mobiledashboard
  2. Log on to Sage Construction Central and select **Intelligence > Dashboards** from the menu to go to the Dashboards Home page.
  3. As long as you logged on with the credentials listed above, synchronization will automatically take place. The **Synchronize** window appears, showing you the progress. After the process is finished, you can set up dashboards and dashboard reports.



## Reasons to perform the Synchronize process after the initial setup



Occasionally, you will need to perform the **Synchronize** again. Reasons include:

- Changes in Sage 300 Construction and Real Estate security, such as the addition of new users or changes in a role setup.
- The addition of custom fields.
- Changes in **Custom Descriptions**, such as the customization of field names or changes in custom lists.
- The creation of new files when you use named files.

When any of the above occurs, first use **System Administrator** to re-restart (stop and start) the replication process or synchronize the security settings (click **Sync Security**), and then perform **Synchronize** in Mobile Dashboards.

## Set up dashboard reports and dashboards

When the **Synchronize** process is finished, you can set up dashboards and dashboard reports.

You will need reports for your dashboards. For your convenience, Sage provides several reports with various report parts that you can use. All you have to do is to import them into your SQL Server database.



**NOTE:** Users with a Viewer license can view individual reports even if there are no dashboards.

The next topics show you how to:

- Import and view Sage dashboard reports.
- Set up dashboards.
- Assign permission on dashboards and dashboard reports.

To perform the steps shown, you must be a user with a license of Mobile Dashboards Designer.

## Import dashboard reports

To begin with, you can build dashboards using the reports provided by Sage. Dashboard reports are installed with your Sage software but you can only use them in Mobile Dashboards after using the **Import Sage Reports** function to copy them into the Izenda database in SQL Server.

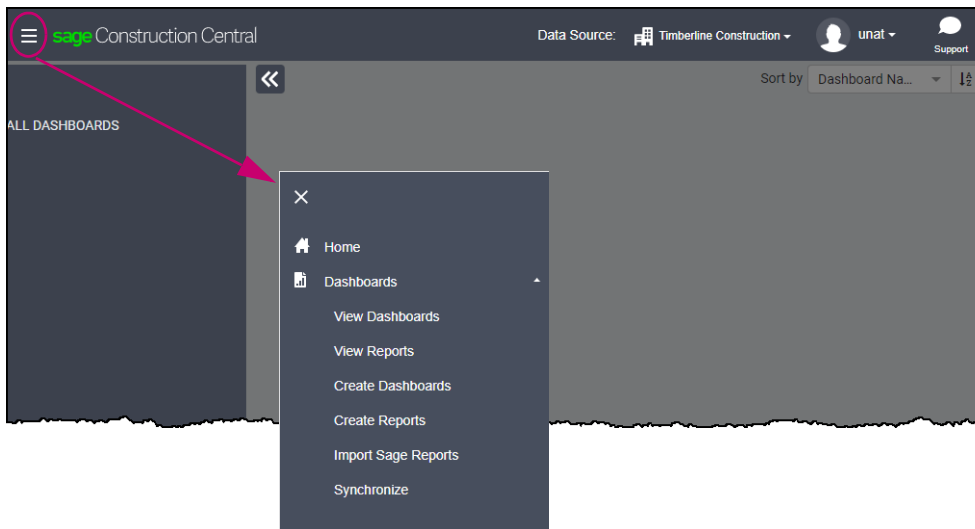


**FOR MORE INFORMATION:** For a list of the dashboard reports and related report parts that Sage provides, refer to the Release Notes and Mobile Dashboards Help (Sage Construction Central: **Support > Help**).



**WARNING:** To perform the steps below, log on to the Sage Construction Central website locally on the Accounting server. You must log on as a user with a license of Mobile Dashboards Designer.

1. On the Sage Construction Central Home page, select **Intelligence > Dashboards** from the menu to go to the Dashboards Home page.
2. Next to **Data Source**, select the company for which to import reports. When you import reports, they are database-specific.
3. Open the Sage Construction Central menu and select **Import Sage Reports** to upload the reports provided by Sage.



4. When the process is completed, open the Sage Construction Central menu and select **Dashboards > View Reports** to view the list of imported reports. Your company name is added to the end of each report name. For example, if the company name is Timberline Construction, the Accounts Payable Summary report is called Accounts Payable Summary (TimberlineConstruction).
5. By default, the security for these reports are set as follows:
  - All users with a Designer license have full permissions to view and edit the reports.
  - All users with a Viewer license have view-only permissions. Users with a Viewer license can view individual reports even if there are no dashboards.
6. If needed, select another company as your **Data Source** and repeat the steps shown above.



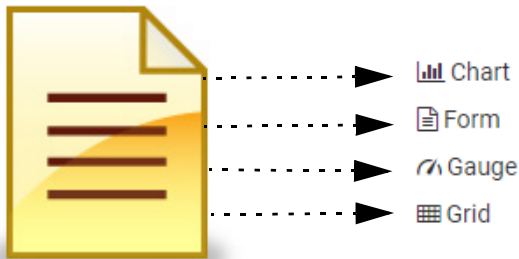
**FOR MORE INFORMATION:** To learn how to limit the reports that users can access, see “Dashboard and dashboard report permissions” on page 35.

## View reports and report parts

The dashboard report design defines where the information comes from—it specifies which views are used from a specific data source (company database). How the information is presented is in the report parts: as a chart, form, gauge, or grid.



**NOTE:** The report part type of Map is not currently supported.



After the Sage reports are imported, anyone with a Designer or Viewer license can open them to examine the report parts.

1. Open the Sage Construction Central menu and select **Dashboards > View Reports**.
2. Next to **Data Source**, select the data source to use for running a report. When you select **As Designed**, the report uses the data source specified on the report design.  
For example, for a report that was imported into the company called Timberline Construction, the data source specified on the design is Timberline Construction. When you set the **Data Source** to the company called Gold Coast, the report overrides the data source on the design and generates information from Gold Coast.
3. In the report list, click the report name, or click the expand icon **+** (to the far right of the report name) and then click **Open**.



**TIP:** To refine the list on the page, use the Search box at the top of the page or select a category in the menu. Imported Sage reports are in the **Local** category called **Sage** and grouped into sub-categories by application.

The screenshot shows the Sage Construction Central interface. At the top, there is a navigation bar with the Sage logo, a search box, and a 'Data Source' dropdown set to 'As Designed'. A user profile for 'Una Tjeon' is visible in the top right. The main content area is divided into a left sidebar and a main panel. The sidebar shows 'REPORTS' and 'TEMPLATES' tabs, with 'ALL REPORTS' expanded to show 'Local Categories' and a 'Sage' sub-category containing 'Accounts Payable', 'Accounts Receivable', 'Cash Management', 'Job Cost', and 'Property Management'. The main panel displays a list of reports under 'LOCAL CATEGORIES' and 'SAGE - ACCOUNTS PAYABLE'. The selected report is 'Accounts Payable Summary (GoldCoastGroup)', created by Sage and last edited on 04/18/2018. Below the report name is a detailed information table:

Report Owner:	136B6417-0E1F-43EF-	Version:	2
Created By:	Sage	Created Date:	04/17/2018
Last Edited By:	Sage	Last Edited Date:	04/18/2018
Number of Views:	5	Last Viewed:	04/21/2018
Average Rendering Time:	1.74 s		

At the bottom of the report details, there are buttons for 'Open', 'Edit', 'Copy', 'Move', 'Print', 'Export', and 'Delete'. Below this, another report 'AP Aging - Vendor Detail (GoldCoastGroup)' is partially visible, also created by Sage and last edited on 04/18/2018.

- Depending on the report, it may have one or several report parts. Some of the features in a report part includes:
  - When you move your mouse over a part or click on it, more information appears on the screen.
  - You can use a filter to show specific information. For some report parts, you are required to enter the filter values before any information is generated.
  - Some report parts contain a drill-down capability. When you click a link, it opens another report to show more details on a new tab.

**Accounts Payable Summary (TimberlineConstruction)**

Print | Export | Edit | Update Result | Save | Cancel | Close

Preview Records: All

**Open Amounts by Vendor**  
Sliced by Month-Year

**Totals by Date**

**Vendor Rank - Open Invoices**  
Top 10

Vendor and Name	Amount Paid	Invoice Balance	Open Retainage	Net Amount
<a href="#">100 - A-1 Electric Company</a>	\$16,458.28	\$21,994.50	\$3,659.72	\$18,334.78
<a href="#">1000 - Jackson Heating &amp; A/C</a>	\$22,275.00	\$0.00	\$2,475.00	-\$2,475.00
<a href="#">101 - Alpha Insulation</a>	\$2,000.00	\$33,739.72	\$1,600.08	\$32,139.64

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**Open Invoice Detail by Vendor**

100 - A-1 Electric Company

Invoice Date	Invoice	Description	Amount Paid	Invoice Balance	Open Retainage	Net Amount
01/16/2015	658791	PO#1000	\$0.00	\$48.00	\$0.00	\$48.00
03/05/2015	30112	PO#1002 WO 23154	\$0.00	\$116.50	\$0.00	\$116.50
03/01/2018	111		\$0.00	\$1,000.00	\$0.00	\$1,000.00
06/24/2015	15678		\$0.00	\$1,250.00	\$0.00	\$1,250.00
04/01/2015	5387		\$0.00	\$1,329.00	\$0.00	\$1,329.00
06/15/2015	149412		\$0.00	\$1,350.00	\$150.00	\$1,200.00
05/12/2015	14987		\$0.00	\$1,574.00	\$0.00	\$1,574.00
05/20/2015	987		\$0.00	\$13,099.50	\$1,455.50	\$11,644.00
07/12/2015	14900	custom paint	\$630.00	\$0.00	\$70.00	-\$70.00
04/28/2015	14598		\$4,500.00	\$0.00	\$900.00	-\$500.00
04/21/2015	049610	10% complete billing	\$5,197.50	\$2,227.50	\$825.00	\$1,402.50
04/23/2015	049612	10% complete billing	\$6,130.78	\$0.00	\$659.22	-\$659.22
			\$16,458.28	\$21,994.50	\$3,659.72	\$18,334.78

**Totals by Date** (Zoomed: August-2015)

- Open Amount: \$2,700.00
- Invoice Amount: \$2,700.00
- Retainage: 300
- Amount Paid: 0

- Use the buttons at the top of the page to:
  - Print the report with the associated parts.
  - Export the report with the associated parts to a Word, Excel or PDF file.
  - Make changes to the report design, such as editing a report part or adding another report part.
  - Make a copy of the report.
  - Move the report into another Category or Subcategory.
  - Save any changes you make to the original report or save the report with another name.



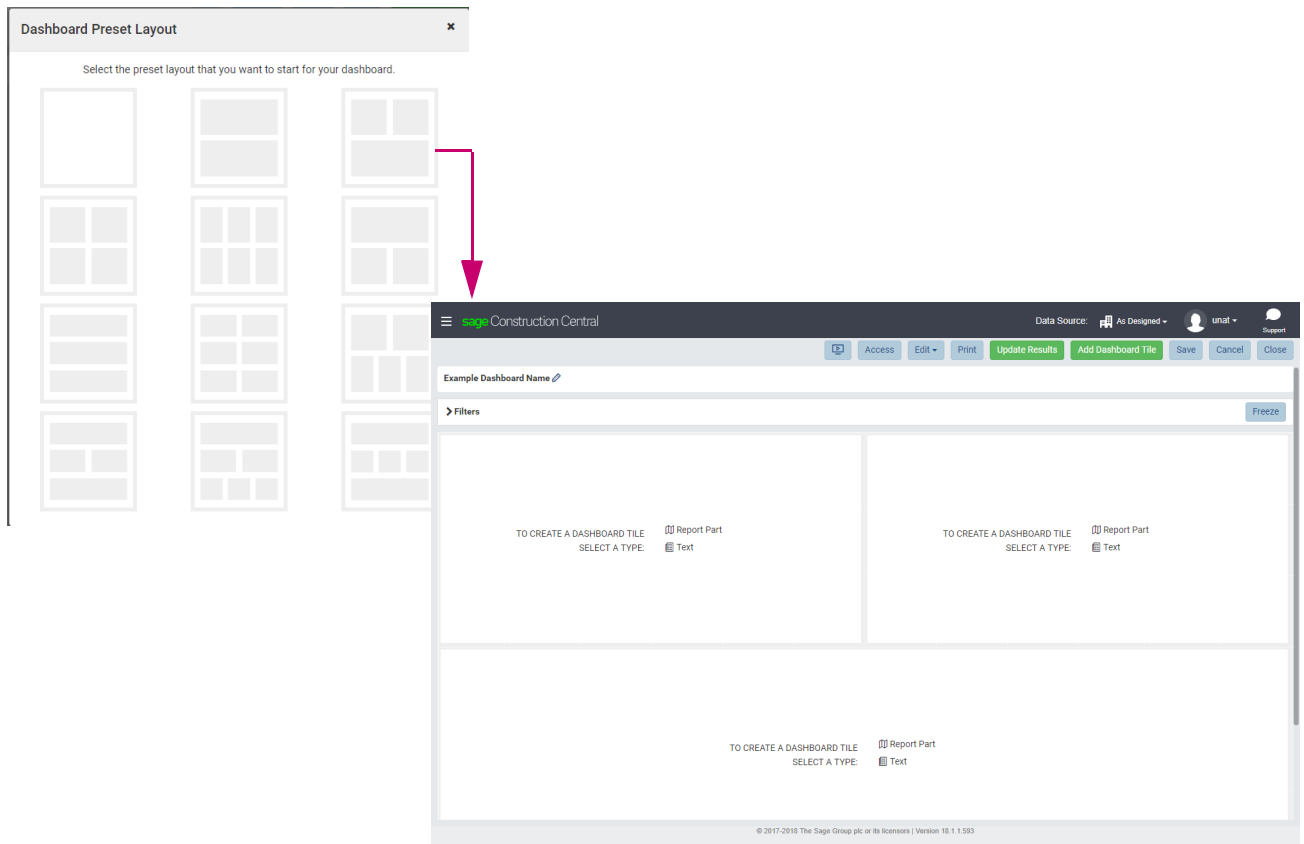
**FOR MORE INFORMATION:** Report permissions settings determine the actions that are allowed. See “Dashboard and dashboard report permissions” on page 35.

## Create dashboards



**NOTE:** Anyone with a license of Mobile Dashboard Designer can perform these steps.

1. Open the Sage Construction Central menu and select **Dashboards > Create Dashboards**.
2. Select how the tiles in the dashboard are organized: each tile can contain text or a report part. Click to select a layout. Later, as you are designing your dashboard, you can change how the tiles are laid out: you can add, remove, and resize the tiles.




3. On the dashboard design page, click **Save** and enter the **Dashboard Name**, **Category** and **Subcategory**.
4. The next topics explain how to organize the tiles in the dashboard and how to use text or a report part in a tile. While you are designing the dashboard, remember to click **Save** to save your additions and changes.

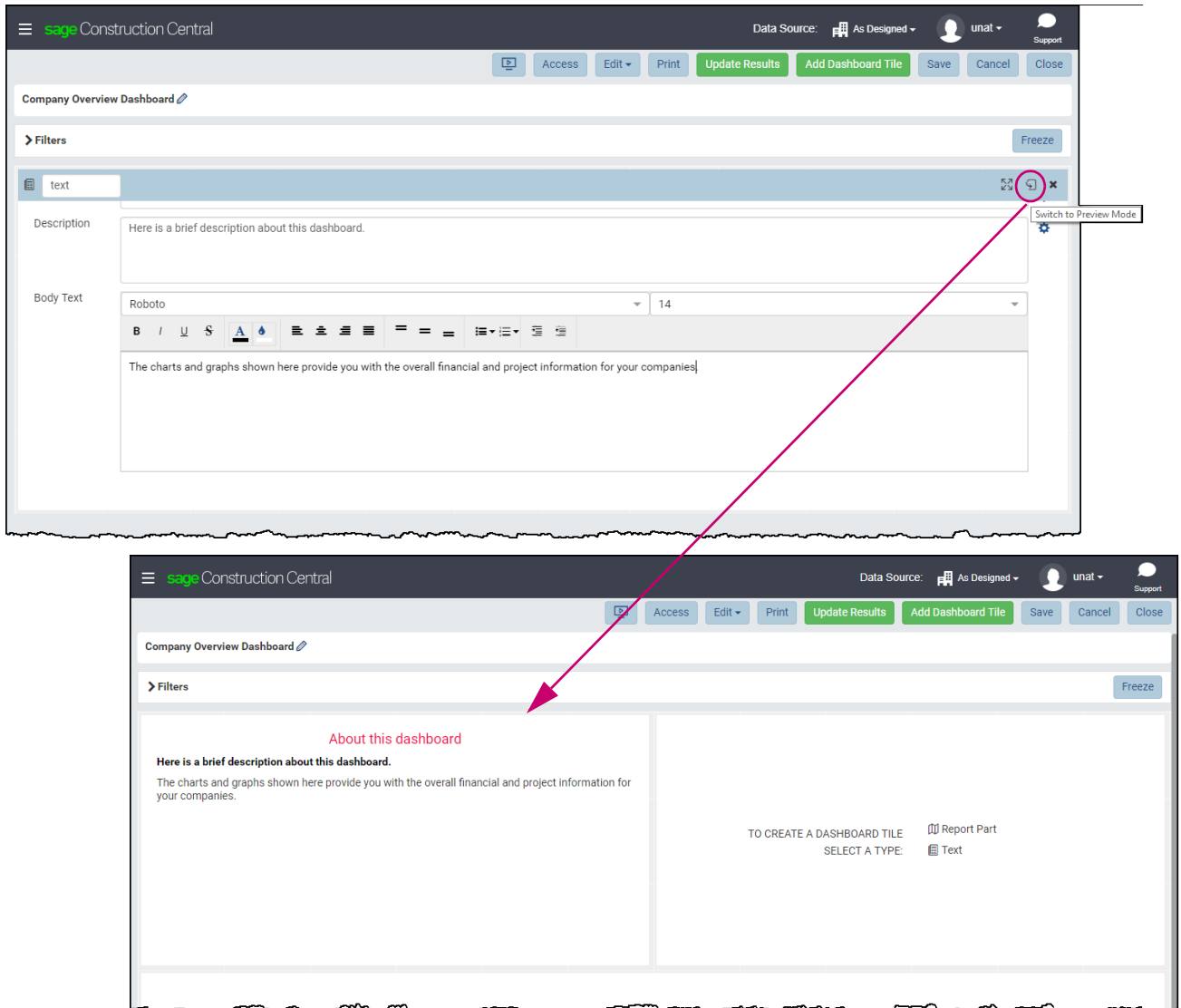
### Organize the tiles in the dashboard

Even if you selected a preset layout for your dashboard, you can change how the tiles are organized. On the dashboard design page:

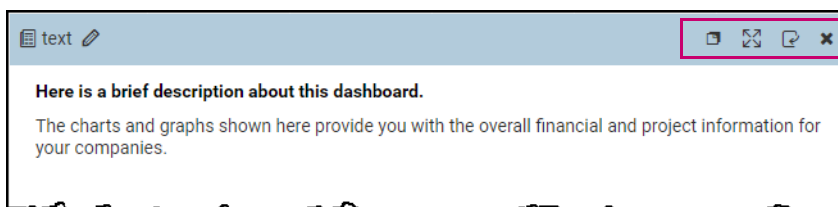
- To resize any tile, drag the corners or the sides.
- To insert additional tiles, use one of these methods:
  - Click **Add Dashboard Tile**. It will add a new tile to an empty space; you may need to scroll down the page to locate the newly added tile.
  - Go to any empty space on the dashboard (represented by the gray grid background) and click once.
- To delete a tile, hover your mouse at the top of the tile and click **x**.

## Use text in a tile

1. On the dashboard design page, select a tile and click **Text**.
2. This switches you to Configuration Mode for the tile. Enter the **Title**, **Description**, and **Body Text**. Information from all three areas will appear in the tile. To format the text in the **Title** and **Description** areas, click the settings icon .
3. When you are done, hover your mouse in the area over the **Title** until a toolbar appears. Click the switch icon to return to Preview Mode on the dashboard design page.



4. When you are on the dashboard design page and you hover your mouse at the top of this tile, a toolbar appears. Because this tile displays text, your toolbar options are: make a copy of the tile, display in full screen, switch to Configuration Mode to edit the text, delete the tile.





## Use a report part in a tile

1. On the dashboard design page, select a tile and click **Report Part**.
2. The **Report Part Selection** window appears. Enter the search criteria to find reports and click **Search**.



**NOTE:** For imported Sage reports, use **Local Categories** as the **Save Into** and **Sage** as the **Category**.



**FOR MORE INFORMATION:** For a list of Sage report names, their description and the associated report parts, refer to the Release Notes and Mobile Dashboards Help (Sage Construction Central: **Support > Help**).

Report Part Selection
✕

---

**Search Criteria**

Save Into:

Category:  Sub Category:

Report Name:

Created By:  Created Date:

Last Edited By:  Last Edited Date:

To:

To:

3. The **Report Part Selection** window returns a list of reports meeting your search criteria. Use the navigation tools at the bottom of the window to adjust the number of items displayed on a page and to move from page to page to view the reports.  
When you select a report, the associated report parts display at the bottom of the window. Select a report part and click **OK**.

Report Part Selection
✕

---

**Search Result**

Select a report then select report part you would like to display on your dashboard tile

Report Name	Save Into	Category	Sub Category	Created By	Created Date	Last Edited By
<input type="radio"/> AP Open Invoice Detail (TimberlineConstruction)	Local Categories	Sage	Accounts Payable	Sage	04/03/2018	Sage
<input type="radio"/> AP Open Invoice Detail (GoldCoastGroup)	Local Categories	Sage	Accounts Payable	Sage	04/03/2018	Sage
<input type="radio"/> AP Aging - Vendor Summary (TimberlineConstruction)	Local Categories	Sage	Accounts Payable	Sage	04/03/2018	Sage
<input type="radio"/> AP Aging - Vendor Summary (GoldCoastGroup)	Local Categories	Sage	Accounts Payable	Sage	04/03/2018	Sage
<input type="radio"/> AP Aging - Vendor Detail (TimberlineConstruction)	Local Categories	Sage	Accounts Payable	Sage	04/03/2018	Sage
<input type="radio"/> AP Aging - Vendor Detail (GoldCoastGroup)	Local Categories	Sage	Accounts Payable	Sage	04/03/2018	Sage
<input checked="" type="radio"/> Accounts Payable Summary (TimberlineConstruction)	Local Categories	Sage	Accounts Payable	Sage	04/03/2018	Sage
<input type="radio"/> Accounts Payable Summary (GoldCoastGroup)	Local Categories	Sage	Accounts Payable	Sage	04/03/2018	Sage

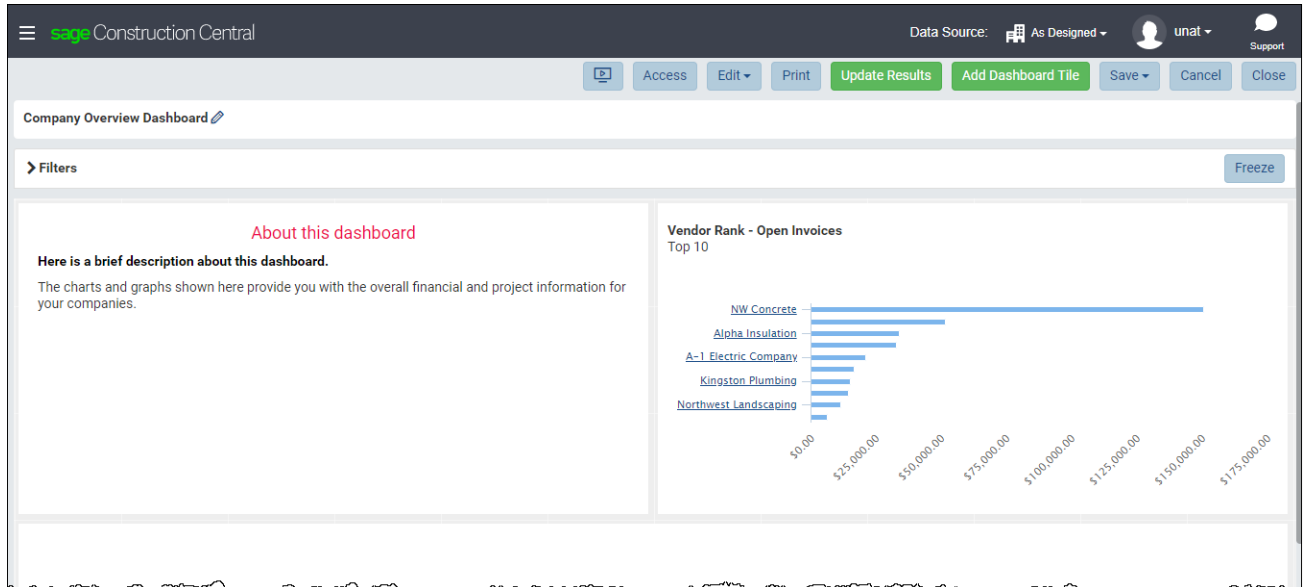
1 to 8 of 8 | Items per page: 10 | < 1 >

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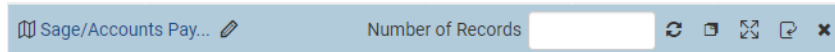
Report Part Title	Report Part Type
<input type="radio"/> Summary Grid	Grid
<input type="radio"/> Summary Donut Chart	Chart
<input checked="" type="radio"/> Rank Bar Chart	Chart
<input type="radio"/> Open Line Chart	Chart

1 to 4 of 4 | Items per page: 10 | < 1 >

4. The report part now appears in the tile on the dashboard design page.



5. When you hover your mouse at the top of this tile, a toolbar appears. Because this tile displays a report part, there are several more options.



If you want to use another report part for this tile, click the Switch to Configuration Mode icon, and then click **Select Report Part**.

## Dashboard and dashboard report permissions

Only users with a license of Designer can assign permissions to dashboards and dashboard reports.

Permissions are assigned by:

- **Role**—the type of Mobile Dashboard license: Designer or Viewer.
- **User**—the Sage 300 Construction and Real Estate user name.

The permissions range from having full access to make edits to the original design to view-only access.

Share With	Access Rights	Action
Role: Mobile Dashboard Designer	Full Access	✕
User: karenj	View Only	✕

The chart below demonstrates what is allowed with the types of permissions you can assign:

Permissions	Access Rights option					
	Full Access	Locked	No Access	Quick Edit	Save As	View Only
View with filter interaction available	Yes			Yes	Yes	Yes
View with no filter interaction		Yes				
Edit the report in Quick Edit mode	Yes			Yes	Yes	
Edit the report in the report designer	Yes				Yes	
Save changes to the original design	Yes					
Use the Save As function when saving	Yes				Yes	



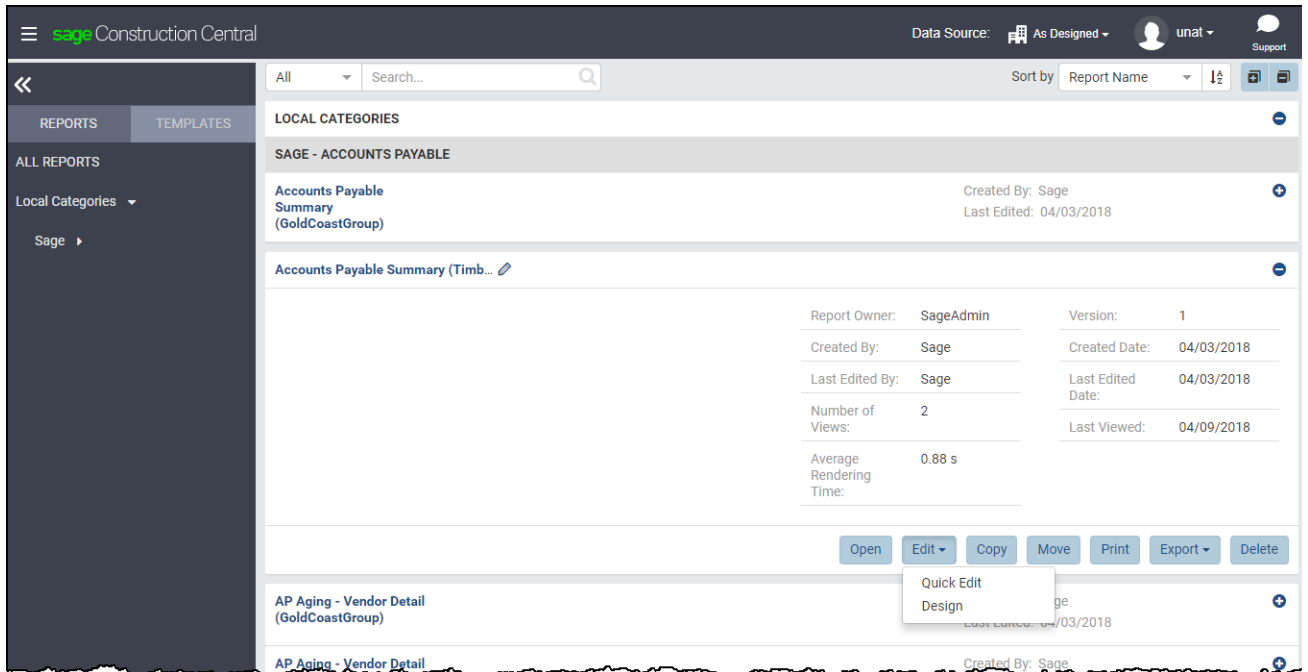
**NOTES:**

- The **Quick Edit** feature is available to all users, either with a Designer or a Viewer license.
- The **Quick Edit** feature is only available on dashboard reports, not on dashboards. The editing functions are limited. For example, you cannot change the data source or apply security settings to a report.

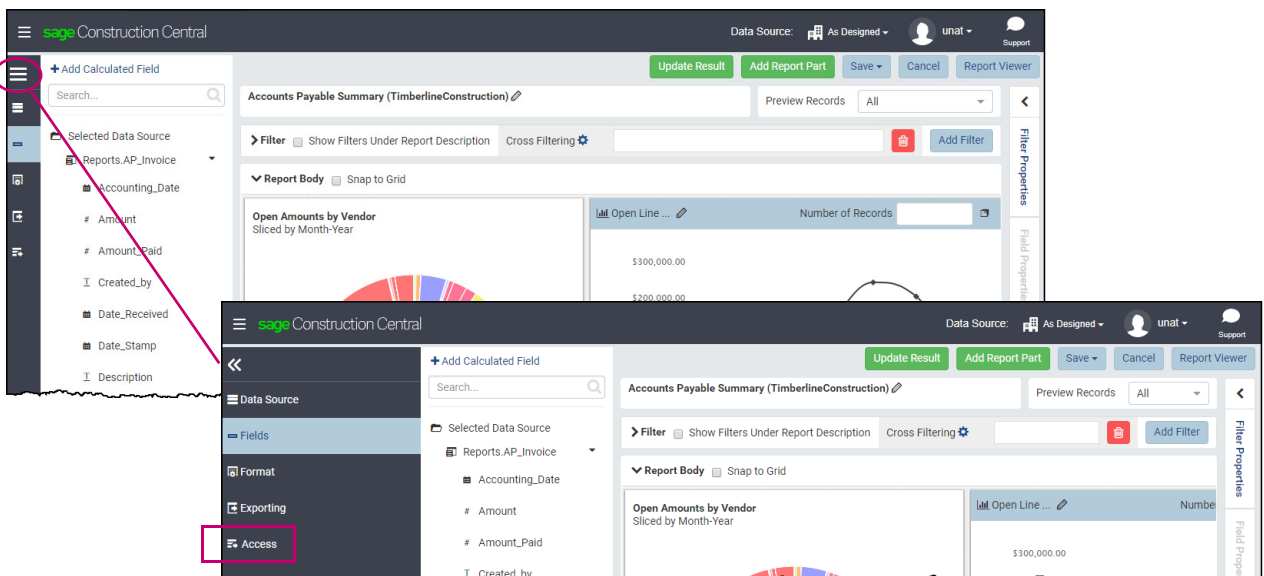
## ► Define permissions on dashboard reports

When you specify the permissions settings on reports, they extend to all the associated report parts and will affect the information displayed on dashboards.

1. Open the Sage Construction Central menu and select **Dashboards > View Reports** to take you to the report list page. Locate the report from the list or use the filter at the top of the page to search for a specific report.
2. Click the expand icon **+** (to the far right of the report name) to display the report details.
3. Click **Edit**, and then **Design**.



4. This takes you to the report designer for this report. Expand the menu located on the left to display the tabs or hover your mouse over the icons for a description. Click **Access**.



5. Report permissions are under **Share With**. Edit the existing permissions as needed. To delete a row, click the **x** in the **Action** column, To add a row, click **Add Sharing**.

Refer to the table in “Dashboard and dashboard report permissions” on page 35 for an explanation of each **Access Rights** option.


The screenshot shows the Sage Construction Central interface for editing report permissions. The main heading is "Accounts Payable Summary (TimberlineConstruction)". Below this, there is a search bar and an "Add Sharing" button. The "Share With" section is expanded, showing a table with the following data:

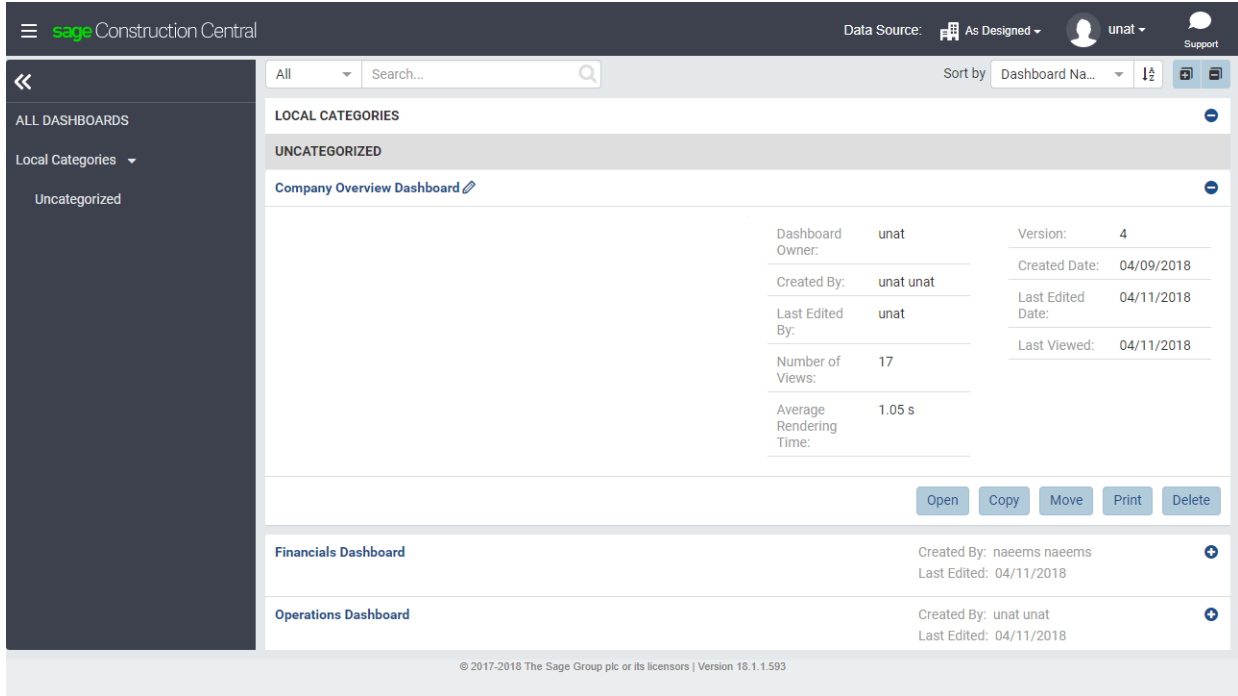
Share With	Access Rights	Action
Role: Mobile Dashboard Designer	Full Access	x
Everyone	View Only	x

A dropdown menu is open under the "Access Rights" column for the "Everyone" row, showing the following options: Full Access, Locked, No Access, Quick Edit, Save As, and View Only.

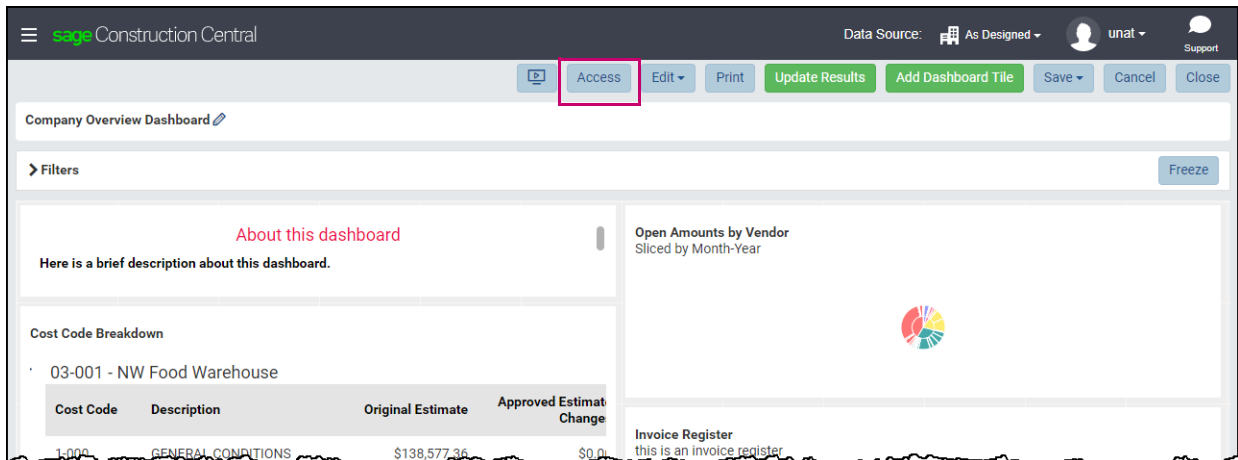
6. Click **Save > Save** when you are done.

### ► Define permissions on dashboards

1. Open the Sage Construction Central menu and select **Dashboards > View Dashboards** to take you to the dashboard list page. Locate the dashboard from the list or use the filter at the top of the page to search for a specific dashboard.
2. Click the expand icon  (to the far right of the report name) to display the dashboard details, and then click **Open**.



3. This takes you to the dashboard design page. Click **Access**.



4. Report permissions are under **Share With**. Edit the existing permissions as needed. To delete a row, click the **x** in the **Action** column, To add a row, click **Add Sharing**.

Refer to the table in “Dashboard and dashboard report permissions” on page 35 for an explanation of each **Access Rights** option.

The screenshot shows the 'Company Overview Dashboard' sharing settings. The 'Share With' section is expanded, showing a table with columns for 'Share With', 'Access Rights', and 'Action'. The table contains two rows: one for 'Role' (Mobile Dashboard Designer) with 'Full Access' and one for 'Everyone' with 'View Only'. A dropdown menu is open for the 'View Only' row, showing options: Full Access, Locked, No Access, Save As, and View Only.

Share With	Access Rights	Action
Role: Mobile Dashboard Designer	Full Access	x
Everyone	View Only	x

Dropdown menu for 'View Only':

- Full Access
- Locked
- No Access
- Save As
- View Only

5. Click **Save > Save** when you are done.

## Create new dashboard reports

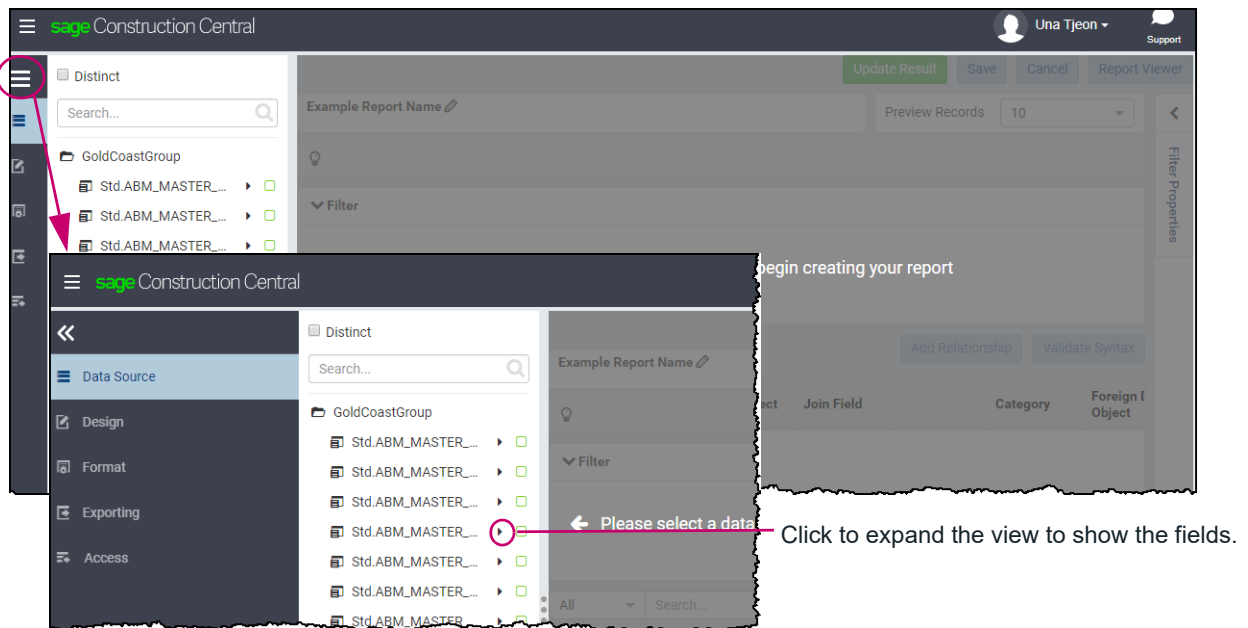
If you have a license of Mobile Dashboards Designer, you can create reports for your organization. This also requires an understanding of the information stored in your company's database.



**WARNING:** A device display resolution of 1024 pixels or below does not support editing or creating dashboard reports.

Creating dashboard reports for your organization requires an understanding of the information stored in your company's database and you must have a license of Mobile Dashboards Designer.

When you open the Sage Construction Central menu and select **Dashboards > Create Reports**, the steps for creating a report are shown on the left. If the menu is minimized, click to expand it.



The steps include:

- **Data Source**, where you select which views and stored procedures to use for the report. The middle panel displays Standard views (**Std**), Reports views (**Reports**), and stored procedures organized by company.



**NOTE:** You can download the list of Standard and Reports views from the Sage Knowledgebase. See [article 91722](#).

- **Design**, where you add filters and create report parts.
- **Format**, where you enter the report title, description, and the header and footer.
- **Exporting**, where you preview your report and edit the layout for exporting.
- **Access**, where you set the permissions for who can access and view the report.

## Learn how to use Mobile Dashboards

You can learn how to use Mobile Dashboards by watching complimentary, short instructional videos posted on Sage University ([www.sageu.com](http://www.sageu.com)). On the Sage 300 Construction and Real Estate product page, find **Mobile Access** under **Training subjects**. Or, type "Mobile Intelligence" in the Search box.



**FOR MORE INFORMATION:** More information on how to use the Mobile Dashboards report designer will be available on Sage University soon.