

Sage 300 Construction and Real Estate

# **Sage SQL Replicator 2.0**

Setup Guide

Certified Course Curriculum



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## **1** Prepare to implement Sage SQL Replicator

## **Overview**

Sage SQL Replicator is a tool that copies your Sage 300 Construction and Real Estate data into a SQL Server database. The replicated data includes your Purchasing, Inventory, and Service Management data if you use those products.

Why is copying your data into SQL Server useful to you?

- In many cases, using the SQL Server data for reporting results in improved processing performance. When you generate Crystal reports in your on-premises Sage 300 Construction and Real Estate applications, you can use the **Use SQL** check box to switch the data source from the original data to the SQL Server data.
- Sage SQL Replicator lays the foundation for accessing your data through Sage Mobile solutions. It is required whether you use Sage Construction Central for Mobile Intelligence (Mobile Reports and Mobile Dashboards).

The replication process works in the background and it can continuously synchronize the Sage 300 Construction and Real Estate and SQL Server databases. This means you can work in the Sage on-premises and mobile solutions without interruption and always get up-to-the-minute information.

If there are databases for which continuous synchronization is not needed, you can specify when and how often to run the replication. In addition, you can select specific database tables to replicate.

This reference guide provides the setup and configuration needed to implement and use Sage SQL Replicator version 2.0. The material applies to system administrators or information technology specialists who will complete the server configuration tasks. You will follow the steps to:

- 1. Prepare for implementing Sage SQL Replicator.
- 2. Install SQL Server.
- 3. Install Sage SQL Replicator 2.0.
- 4. Configure Sage SQL Replicator and replicate the data.

If you are upgrading from an earlier version of SQL Replicator, follow the steps in these chapters:

- Chapter 3, "Install Sage SQL Replicator" on page 21.
- Chapter 4, "Configure and replicate data" on page 23.

In this chapter, you learn about preparing for the Sage SQL Replicator implementation.



**NOTE:** Sage SQL Replicator 2.0.421.0 is compatible with Sage 300 Construction and Real Estate version 24.2 and higher. If you are implementing an earlier version of Sage SQL Replicator for Sage 300 Construction and Real Estate, download the setup guide from the Product Documents web page.

## Prepare to implement Sage SQL Replicator

Before implementing Sage SQL Replicator:

- Verify that your server configuration meets the recommended technical specifications.
- Evaluate whether you will use SQL Server Express or full SQL Server.
- Upgrade to Sage 300 Construction and Real Estate version 24.2 or higher.
- Ensure that the individual who will set up Sage SQL Replicator has the appropriate security permissions.

## System requirement

Installing SQL Replicator to use with Sage 300 Construction and Real Estate adds to the demands on your server resources. Review the <u>Technical specifications</u> documented in the Sage Knowledgebase to ensure that your server meets the recommended configuration in terms of the operating system and hardware.



**NOTE:** Solid State Drive (SSD) is required for the server if it hosts both Sage 300 Construction and Real Estate and SQL Server.

## **Microsoft SQL Server edition**

SQL Replicator requires a dedicated instance of SQL Server which can be installed on the accounting server or on a different server. Later, in "2 Install SQL Server" on page 7, you will learn how to use the Sage SQL Installer to install and configure the instance.

SQL Server comes in different editions.

- SQL Server Express Edition is available at no additional cost—you can download it from Microsoft or let the Sage SQL Installer download it for you.
- SQL Server Standard Edition and SQL Server Enterprise Edition, both full SQL Server, are purchased separately.

Check with your IT vendor to determine which edition best suits your organization based on the features, the size of your database, and processing needs.

Please be aware that SQL Server Express Edition has limitations in terms of CPU and RAM usage—each database can be no larger than 10 GB. See this <u>Microsoft article</u> for more information. Even if the size of your Sage 300 Construction and Real Estate company folder is under 10 GB, it does not mean that you can use SQL Server Express. This is because the replication process adds views and indexes to the SQL Server database, increasing its size.

#### Is the size of your Sage 300 CRE data suitable for using SQL Server Express?

To check whether the size of your data is suitable for using SQL Server Express, follow these steps:

- 1. On the accounting server, browse to the location of your Sage 300 Construction and Real Estate company folders.
- 2. Open the first company folder you want to replicate, and select the **POIVData**, **PVData**, and **SMData** folders and make a note of the size of these three folders.

**NOTE:** You might not have all of these folders. The **POIVData** folder will only be present if you use Purchasing and Inventory. The **SMData** will only be present if you use Service Management.

#### 3. Right-click the selected folders and select Properties.



4. Next, browse to the location of the **MASTER\_QXM** folder. This is in your installation directory, which is in the following location by default:

C:\ProgramData\Sage\TIMBERLINE OFFICE\9.5\Accounting\Global\PVData

5. Right-click the MASTER\_QXM folder and select Properties.



6. Make a note of the size of the folder, and add it to the others.

```
(POIVData) + (PVData) + (SMData) + (MASTER_QXM)
```

- If the total sum is under 6 GB, you can use SQL Server Express.
- If the total sum is greater than 6 GB, you must use full SQL Server (Standard Edition or Enterprise Edition).

## Permissions

If you are the individual who will set up Sage SQL Replicator, your Windows user name must:

- Have local administrative permissions on the machine where the SQL Server instance will be installed and also on the Sage 300 CRE Accounting server.
- Be associated with a Sage 300 CRE user with an Application Administrator role.
- Have the **sysadmin** role in SQL Server.
  - When you install the SQL Server instance for SQL Replicator, your Windows user name is automatically added to the **sysadmin** role. See "Install the SQL Server instance for SQL Replicator" on page 7.
  - After you install the instance, you can use SQL Server Management Studio to set up another user as the backup system administrator. See "Create a backup system administrator" on page 17.



**NOTE:** If you have the Canadian or Australian edition of Sage 300 Construction and Real Estate installed, Sage SQL Replicator requires a Windows user with the Region set to Canada or Australia. This enables the country-specific fields in Accounts Payable and Payroll to be replicated.

## 2 Install SQL Server

SQL Replicator requires a dedicated instance of SQL Server which you can install using the Sage SQL Installer, a tool that comes with your Sage software.

In this chapter, you learn:

- How to use the Sage SQL Installer to perform a Basic and an Advanced installation.
- The required configuration settings for the instance when you use the SQL Server Installation Center.
- How to use SQL Server Management Studio to create a backup system administrator for your SQL Server instance.

Before you proceed with the installation, make decisions on the following:

- Whether to install the SQL Server instance on your Sage 300 Construction and Real Estate accounting server or on a different server.
- If you will use SQL Server Express or full SQL Server. (See "Microsoft SQL Server edition" on page 4.)
- The file locations for the instance and the data. For improved performance, Sage recommends using solid state drives (SSD) to store the SQL data files.

## Sage SQL Installer

The Sage SQL Installer comes with Sage 300 Construction and Real Estate. If you are installing the SQL Server instance on another server (not the accounting server), install the Sage SQL Installer tool on that server.



**WARNING:** The Sage SQL Installer installs the SQL Server instance to work correctly with Sage SQL Replicator. We strongly recommend you use it to install SQL Server.

#### > To install the Sage SQL Installer on a remote server

1. In the extracted installation files for Sage 300 Construction and Real Estate, browse to this location: AccountingServer\Install\Prerequisites\SUSI.

-			SUSI			_	
€ ⊚ - ↑ 🎩 •	Accounting	Server 🕨 Install 🕨 Prere	quisites 🕨 SUSI		v Ċ Se	arch SUSI	م
☆ Favorites	^	Name	•	Date modified	Туре	Size	
Desktop	=	🔩 SUSI.exe		10/16/2017 9:50 PM	Application	1,806 KB	
Downloads 🐌							
Re tplaces			-		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~

- 2. Copy the file SUSI.exe to the server on which you will install the SQL Server instance for SQL Replicator.
- 3. On the computer on which you will install SQL Server, double-click SUSI.exe to install the Sage SQL Installer.

**NOTES:** If you are installing the SQL Server instance on a remote server, there is an additional step for changing the service account name for running the SQL Server Database Engine service after the installation—see "Change the SQL Server Database Engine service account" on page 18.

## Install the SQL Server instance for SQL Replicator

1. Go to the computer on which the SQL Server Instance will be installed and log on as a user with local administrative permissions. During the installation, this Windows user will be added to the SQL Server **sysadmin** server role.

2. In the Windows Start menu, go to the Sage Administration group and click Sage SQL Installer.

Sage Administration	ersal SQL Installer	<b>– –</b> X
Certified Report Service Setup		
License Administration		
ODBC Help		
C Refresh Sample Data	0 CRE 👻	
Sage SQL Installer		
Sage System Verifier		
System Administrator	Back	Next
Upgrade Crystal Reports		

ଡ଼

**TIP:** If you are installing the SQL Server instance on your Sage 300 Construction and Real Estate accounting server, you can also open **Sage SQL Installer** through **System Administrator**. In the Windows Start menu, go to the **Sage Administration** group, click **System Administrator**, and click the **Install SQL Express** button.

- 3. Leave **Sage 300 CRE** selected and click **Next**. A warning appears if your server doesn't meet the minimum hardware requirements. We don't recommend continuing unless your server meets all requirements.
- 4. Click Next if you are ready.
- 5. Select the Automatically download check box if you want the installer to download the latest version of SQL Express 2016 SP1 with Advanced Tools. If you already have the installation file, browse to its location. Alternately, if you have installation media for the Standard or Enterprise edition of SQL Server 2016 SP1, select Microsoft SQL Server 2016 from the dropdown and browse to the installation file.

	Sage Universal SQL Installer	x	<b>a</b>	Sage Univer	sal SQL Installer	Ŀ	- 1	-	x
sag	je		sa	ge					
	Installation Source:			Installation Source:					
[	Microsoft® SQL Server® 2016 Express 64-bit with Advanced Tools			Microsoft® SQL Server® 2016 Ex	press 64-bit with Advanced	Tools 🔻			
	Automatically download			Microsoft® SQL Server® 2016 Ex	press 64-bit with Advanced	Tools			
	13			Microsoft® SQL Server® 2016	Q	Ś			
	Install location:			Install location:					
	C:\Users\ANIT900104\Downloads\SQLEXPRADV_x64_ENU.e; Browse					Browse			
	Back Next				Back	N	ext		

- 6. Click Next. In the next window, select the type of installation.
  - **Basic Install** installs SQL Server and the default SQL file locations on the server's system drive (usually the C: drive). This option does not allow you to change any of the configurations for the instance.
  - Advanced Install takes you to the Microsoft SQL Server's installation interface so that you can customize
    options as you move through the wizard. This is the recommended option if you use a SSD because you can
    specify the location of the instance root directory.

	Sage Universal SQL Installer	- 🗆 X	Sage Universal SQL Installer	□ X
sag	е		sage	
	<ul> <li>Basic Install</li> <li>This option installs the SQL instance with the Sage-required SQL options. There is limited customization.</li> </ul>		<ul> <li>Basic Install</li> <li>This option installs the SQL instance with the Sage-required SQL options. There is limited customization.</li> </ul>	
	<ul> <li>Advanced Install</li> <li>This option enables you to customize the installation by using the Microsoft SQL installer.</li> <li>Note: Use mixed mode authentication. Do not change the collation setting (SQL_Latin1_General_CP1_CS_AS).</li> </ul>		<ul> <li>Advanced Install         This option enables you to customize the installation by using the Microsoft SQL installer.         Note: Use mixed mode authentication. Do not change the collation setting (SQL_Latin1_General_CP1_CS_AS).     </li> </ul>	
	Back	Next	Back Ne:	xt

- 7. Click **Next**, and wait for the file to be downloaded (if you selected that option). The remaining steps depend on whether you selected the **Basic Install** or **Advanced Install** option.
- 8. When the installation is complete, you can install Microsoft SQL Server Management Studio as an option—see "Install SQL Server Management Studio" on page 17.

#### Basic installation

1. The next window shows the name for the new instance. By default, this is **SAGE300CRE**, but you can change it.

	Sage Universal SQL Installe	er	_ 🗆 X
sage			
	Instance Name: SAGE300CRE		
	sa Password:	Guarante	
	Show password	Generate	
	Back		Next

2. Enter or generate a password for SQL Server's **sa** (administrative) user. In addition to **sa**, the Windows user name for the person currently logged in will be added to the **sysadmin** server role.

WARNING: Be sure to record the sa password and save it for your records.

3. Click Next, and wait while the installer creates and configures the SQL Server instance.

#### Advanced installation

You are taken to Microsoft's SQL Server's installation wizard where you can change the prefilled default settings a Sage SQL Replicator instance in each of the configuration windows.

<b>1</b>	SQL Server 2016 Setup
Installation Type	
Perform a new installat	ion or add features to an existing instance of SQL Server 2016.
Global Rules	Perform a new installation of SQL Server 2016
Product Updates	Select this option if you want to install a new instance of SQL Server or want to install shared
Install Setup Files	components.
Install Rules	O Add features to an existing instance of SQL Server 2016
Installation Type	SAGE300CRE
License Terms	
Feature Selection	select this option if you want to add features to an existing instance of SQL server. For example, you want to add the Analysis Services features to the instance that contains the Database Engine. Features
Feature Rules	within an instance must be the same edition.
doctoor Commution	man and and and and and and and and and a

See "Install SQL Server using the Microsoft Installer," on page 10 for detailed information about using the SQL Server Setup wizard.



**WARNING:** Using the Sage SQL Installer's **Advanced** installation option, the server's default collation is set at **SQL\_Latin1\_General\_CP1\_CS\_AS**. Do not change this setting!

## Install SQL Server using the Microsoft Installer

In some cases, you may want to install SQL Server yourself rather than allowing the Sage SQL Installer to install for you. To install an instance compatible with Sage SQL Replicator, follow these instructions.



NOTE: If you are installing SQL Server using the Advanced option of the Sage SQL Installer, skip to step 4.

- 1. Log on to the computer on which you will install the SQL Server.
- 2. In the Windows Start menu, go to the **Microsoft SQL Server 2016 group** and open **SQL Server 2016** Installation Center.

**NOTE:** If you used the Sage SQL Installer to download SQL Server Express (see step 5 of the topic Install the SQL Server instance for SQL Replicator on page 8), locate the file called SQLEXPRADV\_64\_ENU.exe and double-click the file to extract the contents. When the files are extracted, open the folder location, and double-click **Setup.exe** to open the SQL Server Installation Center.

3. In the SQL Server Installation Center window, click Installation on the left, and then click the first option, New SQL Server stand-alone ... in the list. When prompted, provide the location for the installation media.

1	SQL Server Installation Center
Planning Installation Maintenance	New SQL Server stand-alone installation or add features to an existing installation Launch a wizard to install SQL Server 2016 in a non-clustered environment or to add features to an existing SQL Server 2016 instance.
Tools	Launch a download page that provides a link to install SQL S SQL Server 2016
Resources	SQL Server command-line utilities (SQLCMD and BCP), SQL SQL Server Profiler and Database Tuning Advisor. An interne install these tools. Install SQL Server Data Tools Laurch a download name that provides a link to install SQL Server 2016 Setup processes the current operation.
	SSDT provides Visual Studio integration including project system support for Azure SQL Database, the SQL Server Database Engine, Reporting Services, Analysis Services and Integration Services. An internet connection is required to install SSDT. Upgrade from a previous version of SQL Server Launch a wizard to upgrade a previous version of SQL Server to SQL Server 2016.

4. We strongly recommend that you select the option to Use Microsoft Update to check for updates. Click Next.

1	SQL Server 2016 Setup
Microsoft Update	
Use Microsoft Update to check	for important updates
Global Rules Microsoft Update Product Updates Install Setup Files License Terms Feature Selection Feature Selection Feature Configuration Rules Installation Progress Complete	Microsoft Update offers security and other important updates for Windows and other Microsoft software, including SQL Server 2016. Updates are delivered using Automatic Updates, or you can visit the Microsoft Update website.
	< Back Next > Cancel

5. The next window shows the results of the setup rules check. You can ignore warnings about the firewall. If any elements of the check failed, you'll need to fix those issues before you can continue. Click **Next**.

1	SQL Server 2016 Setup	– 🗆 X
Install Rules Setup rules identify potential p can continue.	roblems that might occur while running Setup. Failures must be corre	icted before Setup
Global Rules Microsoft Update Product Updates Install Setup Files Install Rules	Operation completed. Passed: 4. Failed 0. Warning 1. Skipped 0. Hide details << <u>View detailed report</u>	Re-run
Feature Selection Feature Selection Server Configuration Database Engine Configuration Reporting Services Configuration Consent to install Microsoft R Feature Configuration Rules Installation Progress Complete	Rule         Fusion Active Template Library (ATL)         Consistency validation for SQL Server registry keys         Computer domain controller         Microsoft .NET Application Security         Mindows Firewall	Status Passed Passed Passed Passed Warning
	< Bac	k Next > Cancel

6. In the **Installation Type** window, select to perform a new installation of SQL Server. Click **Next**.

7. In the License Terms window, select I accept the license terms, and then click Next.

1	SQL Server 2016 Setup	_ C	1	x
License Terms To install SQL Server 2016, you Global Rules Microsoft Update	must accept the Microsoft Software License Terms.  MICROSOFT SOFTWARE LICENSE TERMS			^
Product Updates Install Setup Files Install Rules License Terms Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Database Engine Configuration Reporting Services Configuration Consent to install Microsoft R	MICROSOFT SQL SERVER 2016 EXPRESS These license terms are an agreement between Microsoft Corporation (or based of live, one of its affiliates) and you. Please read them. They apply to the software nar which includes the media on which you received it, if any. The terms also apply to a Microsoft • updates, • supplements, • Internet-based services, and • support services	n where ned abov iny	you re,	<
Feature Configuration Rules Installation Progress Complete	✓ I accept the license terms. SQL Server 2016 transmits information about your installation experience, as well as other performance data, to Microsoft to help improve the product. To learn more about SQL Sen processing and privacy controls, please see the <u>Privacy Statement</u> .           < Back	Copy usage and ver 2016 c	Pri lata	nt

- 8. In the **Feature Selection** window, at a minimum you must select these check boxes. You can select others if you wish.
  - Database Engine Services
  - SQL Server Replication
  - Full-Text and Semantic Extractions for Search.
- 9. You can change the **Instance root directory** to another local drive or location on your server if you wish. For optimal performance, Sage recommends using your SSD drive for the root directory.

1	SQL Server 2016 Setup					
Feature Selection Select the Express features to in	nstall.					
Global Rules Microsoft Update Product Updates Install Setup Files Install Rules License Terms Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Features: Instance Features SQL Server Replication SQL Server Replication SQL Server Replication SQL Server Replication PolyBase Query Service Reporting Services - Nation Shared Features Client Tools Connectivity Client Tools SDK Occurrentation Compon SQL Client Connectivity S Client Cools SDK Select All Unselect All	n ie) c c ktractions for Sea ie for External Data re ompatibility ents DK V	Feature description:         The configuration and operation of each instance faist instance faist each instance faith f			
	Instance root directory: 9 Shared feature directory: Shared feature directory (x86):	E:\SQL_Server C:\Program Files\Mic	rosoft SQL Server\			

- 10. Click Next.
- 11. In the **Instance Configuration** window, we recommend that you install a **Named instance** using the name **SAGE300CRE** but you can use a different name.



**WARNING:** Avoid using **Default instance**. Because your Sage software does not support sharing its instance with other SQL Server based software solutions, if you use the default instance, you will need to install other SQL based solutions to different instances.

1	S	QL Server 2016 Se	tup		_ 🗆 X
Instance Configuration	n				
Specify the name and instance	e ID for the instance of SC	L Server. Instance ID b	ecomes part of the	installation path.	
Global Rules Microsoft Update Product Updates	<ul> <li>Default instance</li> <li>Named instance:</li> </ul>	SAGE300CRE			
Install Setup Files Install Rules License Terms	Instance ID:	SAGE300CRE			
Feature Selection Feature Rules Instance Configuration	SQL Server directory: Installed instances:	C:\Program Files\Mic	rosoft SQL Server\M	SSQL13.SAGE300CRE	
Database Engine Configuration	Instance Name	Instance ID	Features	Edition	Version
Feature Configuration Pulor	SAGE_ESTIMATING	MSSQL12.SAGE_ES	SQLEngine	Express	12.2.5000.0
Feature Configuration Rules	<shared compone<="" td=""><td></td><td>Conn, BC, SDK</td><td></td><td>13.0.14500.10</td></shared>		Conn, BC, SDK		13.0.14500.10
Installation Progress	<shared compone<="" td=""><td></td><td>SSMS</td><td></td><td>12.2.5000.0</td></shared>		SSMS		12.2.5000.0
Comprese					
			<	Back Next >	Cancel

#### 12. Click Next.



**WARNING:** The settings in the next window are critical to installing a SQL Server instance that will work with SQL Replicator. Configure this window exactly as instructed.

#### 13. In the Server Configuration window:

• On the Service Accounts tab, leave the default service accounts and options as they are.

**NOTE:** If you are installing the SQL Server instance on a dedicated server, replace the virtual account as the **Account Name** for **SQL Server Database Engine** after completing the installation—see "Change the SQL Server Database Engine service account" on page 18.

- Click the Collation tab. The collation under Database Engine must be set to SQL\_Latin1\_General\_CP1\_CS\_AS.
  - If you are not using the **Advanced** option of the Sage SQL Installer, you must click **Customize** and select the correct SQL collation.
  - If you are using the Advanced option of the Sage SQL Installer, the correct SQL collation is already selected by default.



**WARNING:** SQL\_Latin1\_General\_CP1\_CS\_AS is the required collation setting for Sage SQL Replicator. Note that the last characters are "CS\_AS" which stands for "case-sensitive, accent-sensitive."

1	SQL Server 201	6 Setup		_ [	I X		
Server Configuration							
Specify the service accounts and	collation configuration.						
Global Rules Microsoft Update Product Updates Install Setup Files Install Rules	Service Accounts Collation Microsoft recommends that you use Service SQL Server Database Engine	a separate account for each Account Name NT Service\MSSQL\$SAG	SQL Server serv Password	ice. Startup Type Automatic			
License Terms Feature Selection Feature Rules	SQL Full-text Filter Daemon Launc SQL Server Browser	NT Service\MSSQLFDLa NT AUTHORITY\LOCAL	ver Database	Manual Automatic			
Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress	Click here for details	initialization by avoiding zer ing deleted content to be ac	oing of data p	Database Engine SQL_Latin1_Gen Latin1-General, insensitive for U	collation eral_CP1_C case-insens	LAS itive, accent-sensitive, kanatype-insensitive, width- a. SQL Server Sort Order 52 on Code Page 1252 for non-	Customize
Complete				Unicode Data	the SO		
		[		Customiz	e the SQ	L Server 2016 Database Engine Collation	
		Select	the collation yo	ou would like to us	e:		
		O WI	lation designation	designator and so	Albanian		
			Binary		Binary-co	ode point	
			Case-sensitive		Kana-ser	isitive	
			Accent-sensitive	. [	 ] Width-se	ensitive	
			Supplementary	characters			
		• so	l collation use	d for backwards o	ompatibilit	v	
		SQL_F SQL_I SQL_U SQL_U SQL_U	Hungarian_CP12 celandic_Pref_C .atin1_General_( .atin1_General_C .atin1_General_C	250_CS_AS P1_CL_AS CP1_CL_AI CP1_CL_AS CP1_CL_AS CP1_CS_AS		, 	^ 
		Collati	on description:				
		Latin Order	1-General, case- r 51 on Code Pa	sensitive, accent- ge 1252 for non-U	sensitive, k nicode Dat	anatype-insensitive, width-insensitive for Unicode Data, SQ a	L Server Sort
						ОК	Cancel

- 14. When you are finished with the Server Configuration window, click Next.
- **15.** In the **Database Engine Configuration** window, you must select **Mixed Mode**. This mode is required for SQL Replicator.
- 16. Enter and confirm a password for the administrator (sa) account.

**17.** The windows user logged in to the computer will be added automatically as an administrator. Click **Add** to add additional administrators.

1	SQL Server 2016 Setup	_ □ )
Database Engine Confi	guration	
Specify Database Engine authe	ntication security mode, administrators, data directories and TempDB settings.	
Global Rules Microsoft Update Product Updates Install Setup Files Install Setup Files License Terms Feature Selection Feature Selection Instance Configuration Oatabase Engine Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Server Configuration         Data Directories         TempDB         User Instances         FILESTREAM           Specify the authentication mode and administrators for the Database Engine.         Authentication Mode	erver administrators Inrestricted access Database Engine.
	Add Current User Add Remove	
	< Back Next >	Cancel

**18.** On the **Data Directories** tab, the default location reflects the **Instance root location** you selected in step 9. For optimal performance, use your SSD drive for these directories.

1	SQL Serv	er 2016 Setup	- 🗆 X
Database Engine Config Specify Database Engine auther	guration	ators, data directories and TempDB settings.	
Global Rules Microsoft Update Product Updates Install Setup Files Install Rules License Terms Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Server Configuration Data Dia Data root directory: System database directory: User database directory: User database log directory: Backup directory:	ectories TempDB User Instances FILESTREAM ELSQL_Server ELSQL_Server/MSSQL13.SAGE300CRE\MSSQL\Data ELSQL_Server\MSSQL13.SAGE300CRE\MSSQL\Data ELSQL_Server\MSSQL13.SAGE300CRE\MSSQL\Data ELSQL_Server\MSSQL13.SAGE300CRE\MSSQL\Backup	
		< Back Next >	Cancel

19. On the **TempDB** tab, you can add and remove files to store the **tempdb** database on an SSD drive if available.

1	S	QL Server 2016 Setup	x t
Database Engine Confi	guration		
Specify Database Engine auther	ntication security mode,	administrators, data directories and TempDB settings.	
Global Rules Microsoft Update	Server Configuration	Data Directories TempDB User Instances FILESTREAM	
Product Updates	TempDB data files:	tempdb.mdf, tempdb_mssql_#.ndf	
Install Setup Files	Number of files:		
License Terms	Initial size (MB):	8 Total initial size (MB): 64	
Feature Selection	Autogrowth (MB):	64 Total autogrowth (MB): 512	
Feature Rules	Data directories:	E:\SQL_Server\MSSQL13.SAGE300CRE\MSSQL\Data Add	
Server Configuration		Remov	e
Database Engine Configuration			
Feature Configuration Rules			
Complete	TempDB log file:	templog.ldf	
	Initial size (MB):	8 .	
	Autogrowth (MB):	64	
	Log directory:	E:\SQL_Server\MSSQL13.SAGE300CRE\MSSQL\Data	
		< Back Next > Can	icel

20. Click Next. The next window shows installation progress. When it is finished, click Close.

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Global Rules Microsoft Update Product Updates Install Setup Files	Running rules for feature installation.	Complete Your SQL Server 2016 insta	SQL Server 2016 Setup	
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## Important information about SQL Server

SQL Server is installed as a Windows service. If services related to SQL Server are stopped, SQL Replicator cannot replicate data.

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File Action View	Help				
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	Sage Certified Report Generator	Name	Status	Startup Type	Log On As ^
		🔍 SQL Full-text Filter Daemon Launcher (SAGE300CRE)	Running	Manual	NT Service\MSSQLFDLauncher\$SAGE300CRE
	Stop the service	SQL Server (SAGE300CRE)	Running	Automatic	NT Service\MSSQL\$SAGE300CRE
	Restart the service	SQL Server Agent (SAGE300CRE)		Disabled	Network Service
		SQL Server Browser	Running	Automatic	Local Service
		SQL Server CEIP service (SAGE300CRE)	Running	Automatic	NT Service\SQLTELEMETRY\$SAGE300CRE
		SQL Server VSS Writer	Running	Automatic	Local System
		SSDP Discovery		Disabled	Local Service
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		🔍 Superfetch		Manual	Local System 🗸
		<	ш		>
	Extended Standard				

## Install SQL Server Management Studio

SQL Server Management Studio is useful tool for configuring, managing, and administering all components within SQL Server. It is not installed as part of the database engine installation. We recommend that you download and install SQL Server Management Studio if it is not already installed on your server.

WARNING: This procedure will require you to restart your accounting server.

1. In your web browser search for "Download SQL Server Management Studio."



- 2. Click the link to the Microsoft page and download the program.
- **3.** When the download is finished, double-click the file and follow the steps in the wizard to install SQL Server Management Studio. When the installation is finished, you'll be required to restart your server.

## Create a backup system administrator

We recommend that you add a backup system administrator to your SQL Server instance. Your backup administrator should be set up as a user in Sage 300 Construction and Real Estate and linked to a Windows ID. This user should also have local administrative permissions on the accounting server.

- 1. When the server has re-started, open SQL Server Management Studio and log in to the Sage 300 Construction and Real Estate instance.
- 2. Under Security, right-click Logins and select New Login.
- 3. Next to Login name, enter the domain and Windows ID of your backup system administrator.

4. On the Server Roles page, select the sysadmin server role.

😣 Microsoft SQL Server Management Stud	io					
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🍈 🖸 🗸 🖸 🕈 📩 🗧 🎬 🔮 🎜 New Query	Select a page	🖵 Script 👻 😯 Help				
Object Explorer     ▼ ♀ ×       Connect - ♥ ×♥ ■ ▼ ♂ →	<ul> <li>Server Roles</li> <li>User Mapping</li> <li>Securables</li> </ul>	Login name:	Domain\User	Sgarch		
LSSVR21-MP\SAGE300CRE (SQL Server 13.0.400 Databases	🔑 Status	<u>Windows authentica</u> <u>SQL Server authentica</u>	ation			
Security     I    I    I    I    I    I    I		Password:		Login - New		- 🗆 X
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	and the second se	Low VI Horce passe	Securables Status	Server roles:		
				bulkadmin dbcreator		
				diskadmin processadmin		
٠				securityadmin		
Ready				setupadmin Sysadmin		
		l	0			

- 5. Click OK to save your changes and close the Login New window.
- 6. Repeat these steps if this instance is on a different machine than the accounting server and you created a new Windows domain account as described on page 5.

## Change the SQL Server Database Engine service account

If you installed the SQL Server instance to a dedicated server (not your Sage 300 CRE Accounting server), you should replace the virtual account used for running the SQL Server Database Engine service.

**NOTE:** Both the Sage SQL Installer and the Microsoft Installer installed the instance using the default virtual account for the SQL Server Database Engine service.

For a remote SQL Sever instance, the SQL Server Database Engine service should run with the built-in Network Service account or a Domain Service account that:

- Exists on your Sage 300 CRE Accounting server.
- Has the proper permissions to the Sage 300 CRE company folders you plan to replicate and to the **TIMBERLINE OFFICE** share folder (this share folder is on your Sage 300 CRE Accounting server, and installed to ProgramData\Sage by default).

Use these steps to change the SQL Server Database Engine service account:

- 1. On the dedicated server where the SQL Server instance is installed, open SQL Server Configuration Manager.
- 2. Locate the service called SQL Server (SAGE300CRE)—the text in parenthesis is the name of your instance. Right-click on this service and select **Properties**.

**3.** On the **Log On** tab, select **This account**, and enter the **Account Name** and **Password** for the Domain Service account (preferably one without password expiration restrictions) or the built-in Network Service account.



## 3 Install Sage SQL Replicator 2.0

An additional, separate installation is required for SQL Replicator in order to replicate your data.

#### • To install SQL Replicator 2.0

- 1. Download the file called **SageSQLReplicator.exe** and run the installation on your Sage 300 CRE Accounting server. You must be logged on to the server with local administrative permissions.
- 2. In the Welcome screen, accept the terms of the license agreement and indicate where to install the files.
  - The default location is C:\Program Files (x86)\Sage\SageSQLReplicator. If you accept the default location, click Install to begin the installation.
  - To specify a location to install the files, click **Destination** and enter the path. Click **Install** to begin the installation.

sage

Welcome to SageSQLReplicator Insta	lation	sage	
SAGE END USER LICENSE A IMPORTANT SCHLETTERUUGH AND READ ALL 1. GRANT OF LICENSE Sage ("Scale") and other capitalized terms an (croopt as set forth in Section 3b below), non-subidiornable license with Sage for either an initial license or an upgrade (such as for mo accepted such order and Embled Use of the Schlemers, and (2) Acce or during installation of the Program. YOU WILL INDICATE YOUR AC CONDITIONS IP ODING ONE OR MORE OF THE FOLLOWING ON (a) CULORING 1 AGREE" OR A SIMILAR AFFIRMATION, AS AFFLCA	ND SUPPORT AGREEMENT OF THE FOLLOWING TERMS AND CONDITIONS defined below) grants You a limited, non-axclusive, in of the scope described in this Agreement to Use the users, additional modules, etc.), or a Service Plan, the aid of the terms and conditions of this Agreement CEPTANCE OF THIS AGREEMENT AND ALL OF ITS LOWING OR AUTHORIZING A THRO PARTY TOO BLE THAT APPEARS DURING INSTALLATION OF TH	onéransferable Sofkvare only and Stage has a claher before TERMS AND DI FOR YOU- E PROGROM,	
	24 >	<b>•</b>	
<ul> <li>I accept the terms in the license agreement</li> <li>I do not accept the terms in the license agreement</li> </ul>	Destination Install	Cancel	
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3. A message appears when the installation is finished.

## 4 Configure and replicate data

In this chapter, you learn:

- How to configure the settings for data replication.
- How to monitor the status and progress of the replication.
- Which Windows services are required for SQL Replicator.
- How to ensure that schema changes in the Sage 300 Construction and Real Estate data are updated in the SQL database.

Before you proceed, decide on the following:

- Which company database to replicate.
- Whether to replicate all the database tables for a company. If only certain tables are needed, make a note of which ones.
- Whether you want the replication to occur continuously. If using scheduled replications, make a note of when the process starts each day.

In addition, we recommend that you complete the following preparations before replicating the data:

- Use **File Tools** to remove any non-core transaction files (also referred to as "dummy files") from your company data folder. See **Sage Knowledgebase article 96052**.
- Use the Sage 300 CRE utility called **File Doctor** to check for corrupt records in the databases that you plan to replicate. Sage SQL Replicator does not replicate tables with corrupt records. To find out how to use **File Doctor**, see <u>Sage Knowledgebase article 20400</u>.



**WARNING:** If you are already using Sage SQL Replicator, you must stop the replication process before running **File Tools** or **File Doctor**.

• Identify all the users who need access to the SQL data, and add them to Sage 300 CRE **Security Administration** with the appropriate permissions. For more information, see "Security" on page 35.

## Sage SQL Replicator configuration and settings

Before you replicate data, you must configure the replication settings. These controls are in **System Administrator** (in the **System Administration** group). The steps are explained in the next sections, and include:

- 1. Creating the SQL Replicator configuration database.
- 2. Creating a company configuration database for each company you want to replicate.
- **3.** Using **Configuration Manager** to define which database tables to replicate and how often the replication occurs.

**NOTE:** Even if you have replicated your data using an earlier version of Sage SQL Replicator, you must complete steps 1 and 2 to update the configuration databases.

## SQL Replicator configuration database

1. Log on to the Sage 300 Construction and Real Estate accounting server as a user with local administrative permissions. The Windows user name must also have the **sysadmin** role in SQL Server.



NOTE: The user who used Sage SQL Installer to install the SQL Server instance is automatically assigned the sysadmin role.

2. On the Windows Home page, go to the Sage Administration group and click System Administrator.

- **3.** In the **Log On** window, you must enter the credentials for a Sage 300 Construction and Real Estate user that has the **Application Administrator** role.
- 4. If the connection window does not open, click **Replicator Settings** to go to that tab, and then click **Connect**.
  - In the box next to **Server name**, select the name of the instance that you created—see page 7.
  - For Authentication, select Windows Authentication. Your Windows domain and user name are automatically entered for the User name.
  - Click Connect.

•		System Adr	ministrator - Sage 300	Construction and Real Estate	_ <b>_</b> ×
	sage 300 Co	onstruction ar	nd Real Es	tate	Version:
		onocia ocioni al	Cor	nnect to Microsoft SQL Server	?
	Replicator Settings		Server name:	LSSVR25-MP\SAGE300CRE	sile Sync Security
	Backup	Connect Not Connected	Authentication:	Windows Authentication	Repair Services
L	Restore	Company On-D	User name:	BEST\UNAT	Replicating
			Password:		
			? Install S	QL Express Connect Cancel	

5. If you have never replicated your data before, you are prompted to create the SQL Replicator configuration database. Click **Yes**. This creates the **SageCREGlobalConfiguration** and the **Izenda** databases in the SQL Server instance. The **Izenda** database is used for Mobile Dashboards.

**NOTE:** The prompt to create the configuration database does not appear if these databases already exist (from using an earlier version of SQL Replicator) and do not require any updates.

reate Configuration Database Confirmati	on	×
Sage 300 Construction and Real exist on server another database server.	Estate configuration database does not fes" to create it now or "No" to pick	
	Yes No	]
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		Creating Replicator Configuration Database     -      -      ×      Secce 3000 Construction and Real Estate      [81.1.1413     ALTER Permission for [Common][Attachment]     [81.1.1414     Becurity[Ured triggers     181.1.1414     Becurity[Ured triggers     181.1.1420     Support for 17.1.7.20 upgrade     181.1.1420     Support for 17.1.7.20 upgrade     181.1.1400     Iterda Set Additive Field Flags     181.40001    Iterda Set Additive Field Flags     181.40003    Iterda Set 3.2     181.40004     Iterda Set 3.2     181.40005     Iterda Set 3.2     Iterd
		Cancel

6. When finished, the Replicator Settings tab shows the list of companies in your Open Company list.



7. If you will access the data through Sage Construction Central for Sage Mobile services, click Link to Mobile.

NOTE: Your mobile website will be available once the initial replication is finished.

Next, you create the company configuration database for each company that you want to replicate—continue to the next topic to learn this.

### **Company configuration database**

- 1. On the **Replicator Settings** tab of **System Administrator**, locate the first company that you want to replicate and click **Configure**.
- 2. If you have never replicated the data for this company, the **Create Configuration Database Confirmation** message appears. Click **Yes**—this creates a database named after this company in the SQL Server instance.

TV.

**NOTE:** The prompt to create the company configuration database does not appear if the database already exists in the SQL Server instance (from an earlier version of SQL Replicator). When you click **Configure**, it will automatically apply upgrade scripts if needed.

You can click **View Logs** to open the **Sage LogViewer** to view the detailed actions. If you need to print out the log later, note the location of where these log files are stored in the title bar of the **Sage LogViewer** window.

		System Administrator	- Sage 300 Const	ruction and Real Estate	- 🗆 X	
<b>sage</b> 300	) Construct	tion and Re	eal Estat	е	Version:	
Replicator Settings	Connected: LSSVR25-	MP\SAGE300CRE (BEST\U	NAT) SQL Server 20	116 SP1 Express Edition (64-bit)		
Backup	Company	Database	Pervasive Data Fol	der		
Restore	Gold Coast Group	GoldCoastGroup	\\lssvr25-mp\Tir	nberline Office\Data\PM Sample Data\	Configure	
	Timberline Constructi	ion TimberlineConstructio	n \\lssvr25-mp\Tir	mberline Office\Data\Construction Sample Da	ta\ Configure	
		Create Co	onfiguration Data	base Confirmation		
		The SQL databa	ise TimberlineConstru	ction has not yet been created.		
		Create now?				
				Yes No		
				<b>V</b>		
			😌 Creating Re	olicator Company Database	- 0	×
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	339	2020-03-11 10:2	2:25.110367 PM	001 - Company Database Builder	Information	Upgrading company database "Timberline
	340	2020-03-11 10:2	2:25.283495 PM	001 - Company Database Builder	Information	Upgrading company database "Timberline
	341	2020-03-11 10:2	2.25.503617 PM	- Company Database Builder	Thromatoron	opgrading company database "Timberline
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3. When it finishes running the scripts, you will be prompted to connect to the SQL instance again for the Configuration Manager.

4. The **Configuration Manager** opens and automatically connects to the data to read the schema so that it can create the schema (tables, views, and objects) for the corresponding company database in SQL. This process determines the list of tables that are available in the **Table Selection** window explained in the next topic.

E	]			Config	uration Manager			<b>–</b> 🗆 X
	<b>sage</b> 300 (	Constru	uction an	d Real Est	ate		Ve	rsion:
	Settings Database/Table Status	Enabled	Company	Database		Data Folder	Tables	Selection
l	Activity Details Server Status							
				Generati	ing configuration	_ <b>_ X</b>		
			Processing	GLM_MASTER_ACCOUNT_F	PREFIX_A_CUSTOM_FIELDS			
						Cancel		

5. When the process is finished, remain on the **Settings** tab of **Configuration Manager**. Next. you will define the replication settings and start the replication process—continue to the next topic to learn this.

## Specify the replication settings for each company

1. On the **Settings** tab of **Configuration Manager**, click the **Settings** button to open the **Table Selection** window. You use this to specify which tables are replicated and how often the replication occurs.



2. All the data tables are automatically included for replication.

- The **Enable Replication** check box is automatically selected. This is required for replication to take place.
- Click the arrow next to an application name to view the tables. For tables that you do not want to replicate into SQL Server, clear the check box next to the table name. Note that certain tables are required and you are unable clear the check boxes for these tables.



TIP: Look for "dummy files" and exclude them from replication.



**WARNING:** By excluding certain tables from replication, some reporting views and stored procedures will not work, affecting the ability to return information on certain Crystal reports and in Mobile Dashboards. See "Changes to the replication settings" on page 37.

 Do not use the Select Minimal option if you use Mobile Intelligence or SQL reporting because the replication is limited and you are not permitted to adjust the table selection. See Sage Knowledgebase article 93399 for the list of tables that are replicated with this option.



**3.** The replication frequency is automatically set to continuous unless you specify a scheduled time. Use **HR** and **MIN** to select the time and click the plus symbol to add it. You can set up multiple scheduled replications per day.



- 4. Click Save to save your settings.
- 5. On the Settings tab of Configuration Manager:
  - The **Enabled** column shows **Yes** if the **Enabled Replication** check box is selected in the **Table Selection** window.

• The **Tables** column shows the number of tables selected for replication.

l			Config	guration Manager		_ 🗆 X
<b>sage</b> 300 (	Const	ruction ar	nd Real Est	ate	Ve	ersion:
Settings	Enabled	Company	Database	Data Folder	Tables	Selection
Database/Table Status	Yes	Timberline Construction	TimberlineConstruction	\\lssvr25-mp\Timberline Office\Data\Construction Sample Data	448	Settings
Activity Details			C-1.10			
Server Status						
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		

6. If there are additional companies for which you want to replicate the data, close **Configuration Manager** and return to **System Administrator** and repeat these steps for each company.

After you have configured the settings for all the companies, you are ready to start the replication—continue to the next topic to learn this.

## Start the replication

On the **Settings** tab of **Configuration Manager**, click **Start** to begin the replication for all the companies where the **Enabled** column shows **Yes**. Do this even when all the companies are configured to use scheduled replications.

**WARNING:** The **Start** and **Stop** buttons on the **Settings** tab affect all the companies. If you later want to stop the replication for only one company, see "To stop the replication for a company" on page 37.

Configuration Manag	er					-	- 🗆 ×
20		hard the second	Deel Catata				Version:
sage 300	JCons	struction and	Real Estate				?
Settings	Enabled	Company	Database	Data Folder	Tables	Selection	
Database/Table Statu	s Yes	Gold Coast Group	GoldCoastGroup	\\C3001851489d01\Timberline Office\Data\PM Sample Data	382	Settings	
Activity Details	Yes	Timberline Homes, Inc.	TimberlineHomesInc	\\C3001851489d01\Timberline Office\Data\Home Builder Sample Data	246	Settings	
Server Status	Yes	Timberline Construction	TimberlineConstruction	\\C3001851489d01\Timberline Office\Data\Construction Sample Data	672	Settings	
							I
		<u> </u>					
	Star	t Stop					View Log

The replication operation follows this order:

- 1. Replicates the data for the selected tables for each company.
- 2. Creates SQL reporting views (see page 34).
- 3. Copies Sage 300 CRE security settings into SQL (see page 35).

While the replication is in process, users can continue to work in Sage 300 Construction and Real Estate without interruption. The length of time it takes to complete the initial replication depends on the size of your database and your server hardware.

You can view the replication activity by clicking **Activity Details** in **Configuration Manager**. When the initial replication is finished, the **Message** column shows **Initial replication completed**.



**TIP:** To check for warnings and errors with the replication process, click **View Log**.



FOR MORE INFORMATION: Configuration Manager provides tools for monitoring the replication—see page 30

**NOTE:** If you will access the data through Sage Construction Central for Sage Mobile services, you must follow the instructions in the Sage Construction Central Setup Guide to grant security permissions and licenses to users, and deploy your mobile website through Microsoft Azure Cloud Services.



**WARNING:** For data integrity, when you back up your Sage 300 Construction and Real Estate data, you must also back up the corresponding SQL Server database. You can use the **Backup** feature in **System Administrator**.

## **Replicator monitor tools**

The **Database/Table Status**, **Activity Details**, and **Server Status** tabs in **Configuration Manager** let you monitor the replication progress and server usage. See the next pages to learn how to use the information on these tabs.

Yes         Gold Coast Group         GoldCoastGroup         \C3001851489d01\Timberline Office\Data\PM Sample Data         382           Activity Details	Settings
Activity Details	
Yes Timberline Homes, Inc. TimberlineHomesinc \\C3001851489d01\TimberlineOffice\Data\Home Builder Sample Data 246	Settings
Yes Timberline Construction TimberlineConstruction \\C3001851489d01\Timberline Office\Data\Construction Sample Data 672	Settings

## Database/Table Status

Use the **Database/Table Status** tab to check the replication progress.

The upper grid shows the companies for which you have enabled replication. It indicates:

- The number of errors that occurred during replication. The individual errors are listed in the **Activity Details** tab.
- The latest time that a table finished replicating.

The tables shown in the lower grid are based on the database that you select in the upper grid. Use this grid to learn the replication status of each table. Once a table has finished replicating, the date and time are entered in the **LastReplicated** column.

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TIP: You can click any column header to sort the information in ascending or descending order.

Configuration Manager												- 0	×
000	<u> </u>											Version:	
<b>sage</b> 300	Const	ruction and	Real Est	ate									?
	_												
Settings	Databases:												
Database/Table Status	Enabled	Name	D	)ataFolder		9	QLDatabaseNam	e Size	Summary	Assessment	ErrorCount	LastReplicated	
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Conversion Charters	Yes	Timberline Construction \\C30018	351489d01\Timberline	Office\Data\C	onstruction San	ple Data Tin	nberlineConstruct	ion 873.27	Working (360 of 360)	Holding steady	0	2020/03/12 21:35:42	
Server Status	Yes	Timberline Homes, Inc. \\C30018	851489d01\Timberline	Office\Data\H	ome Builder Sa	mple Data Tin	nberlineHomesInd	982.32	Working (132 of 132)	Holding steady	0	2020/03/12 21:25:46	
	Status for "O	Gold Coast Group":											
	(												
		Table	Operation	Completed	Total	Percent	RowSec	eta 🕐	Progress			LastReplicated	<b>^</b>
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	APM_MASTER, APM_MASTER, APM_MASTER, APM_MASTER, APM_MASTER, APM_MASTER, APM_MASTER, APM_MASTER, APM_MASTER, APT_CURRENT APT_HISTORY,	Table _AUTHORIZATION BATCH _CHECK _DIST_PAYMENT _DISTRIBUTION _INVOICE _INVOICE _INVOICE_PAYMENT _PREFUX_TOTAL _VENDOR _TRANSACTION _TRANSACTION _TRANSACTION	Operation Idle Idle Loading Initial State 1 Loading Initial State 2 Loading Initial State 2 Loading Initial State 3 Loading Initial State 1 Loading Initial State 1 Loading Initial State 2 Loading Initial State 2 Loading Initial State 2	Completed 595 586 598 518 88 56 1,301 2,104	Total 595 686 598 518 88 56 1,301 2,104	Percent 100.0 100.	RowSec           10,987         5           00         5           00         5           00         5           00         5           00         5           00         5           00         5           00         5           00         5           00         5           00         5	ETA Ο H35 PM (Δt 0s) H35 PM (Δt 0s)	Progress		2020/03/11 1 2020/03/11 1	LastReplicated 7:43:03 7:43:07 7:43:09 7:43:16 7:43:16 7:43:18 7:43:22 7:43:22 7:43:25 7:43:25 7:43:27 7:43:33 7:43:37 7:43:39 7:43:39 7:43:39	
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### **Activity Details**

Use the **Activity Details** tab for detailed information about the replication for each table. To locate specific information:

- Use the drop-down next to **Level** to filter the type of information shown: all information, only warnings, or only errors.
- You can also use the Search box to locate specific entries based on text in the Message column.

When the initial replication is finished, the Message column shows Initial replication completed.

The information in the **Activity Details** tab is cleared out when you close **Configuration Manager** and is not logged by default. For troubleshooting purposes, you can enable logs to retain this information— follow the steps in **Sage Knowledgebase article 100109**.

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ttings	Level: Info	v			Search	Auto Scroll Clear	r			
/Table Status	Timestamp	Туре	Process		м	lessage				
ty Details	3/12/2020 8:57:14 PM	Info	BulkCopier	Bulk-copy	results for 'API_NEW_CREDIT_CARD_PAYMENT'	0 rows in 307 ms	0 rows/sec.	I: 0	U: 0	
er Status	3/12/2020 8:57:15 PM	Info	BulkCopier	Bulk-copy	D: 0 E: 0 / results for 'GLM_MASTER_ACCOUNT_PREFIX_A_CUSTOM_FIELI	DS' 0 rows in 4	48 ms 0 rows/se	ic.	l: 0	U: 0
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	3/12/2020 8:57:15 PW	into	Buikcopier	вик-сору	D: 0 E: 0	203 rows in 300 ms /	/ 15 rows/sec.	1: 205		0:0
	3/12/2020 8:57:15 PM	Info	BulkCopier	Bulk-copy	y results for 'API_NEW_DIST_PAYMENT' F: 0	0 rows in 105 ms 0 r	ows/sec. I: 0	U: 0		D: 0
	3/12/2020 8:57:16 PM	Info	BulkCopier	Bulk-copy	results for 'GLM_MASTER_ACCOUNT_PREFIX_AB'	0 rows in 863 ms	0 rows/sec.	I: 0	U: 0	
	3/12/2020 8:57:17 PM	Info	BulkCopier	Bulk-copy	D: 0 E: 0 ( results for 'APM_MASTER_ELECTRONIC_PAYMENT'	0 rows in 103 ms	0 rows/sec.	I: 0	U: 0	_
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	3/12/2020 8:57:17 PM	Info	BulkCopier	Bulk-copy	<pre>/ results for 'GLM_MASTER_ACCOUNT_PREFIX_AB_CUSTOM_FIEI D: 0 E: 0</pre>	LDS' 0 rows in	58 ms 0 rows/s	ec.	I: 0	U: 0
	3/12/2020 8:57:17 PM	Info	BulkCopier	Bulk-copy	results for 'API_NEW_INVOICE_PAYMENT'	0 rows in 125 ms 0	) rows/sec. l: 0	U: 0		D: 0
	3/12/2020 8:57:18 PM	Info	BulkCopier	Bulk-copy	e: U / results for 'APM_MASTER_INVOICE'	46 rows in 175 ms 264	rows/sec. 1:46		U: 0	_
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	5/12/2020 6:57:19 PW	inio	Buikcopier	Buik-copy	E: 0	o rows in 225 ms o	o rows/sec. 1: 0	0:0		0:0
	3/12/2020 8:57:19 PM	Info	BulkCopier	Bulk-copy	<pre>results for 'GLM_MASTER_ACCOUNT_PREFIX_ABC' D: 0 E: 0</pre>	0 rows in 1,005 ms	0 rows/sec.	I: 0	U: 0	
	3/12/2020 8:57:19 PM	Info	BulkCopier	Bulk-copy	results for 'APM_MASTER_INVOICE_PAYMENT'	17 rows in 105 ms	162 rows/sec.	l: 17		U: 0
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## **Server Status**

The **Server Status** tab shows the load and memory usage, and the number of processes running on your server. Make a special note of the sever information—full memory usage or a high CPU load negatively affects the replication process.

Configuration Manager				– 🗆 X
0.00	- · · · ·			Version:
<b>sage</b> 300 (	Construction and	d Real Estate	9	(?)
				<u> </u>
Settings	Server	Status	Progress	<u>^</u>
Database/Table Status	□ = Sage SQL Replicator (Total)	24 processes, 626 threads		
Activity Details	└─ Memory Usage	1,494 MB of 7,168 MB		
Correct Charles	└─ CPU Load	39.50%		
Server Status	└─ Start Time	3/12/2020 9:11:35 PM (12m 57:		
	□ = SQL Replicator Service	2 processes, 58 threads		
	└─ Memory Usage	172 MB of 7,168 MB		
	└─ CPU Load	3.30%		
	└─ Start Time	3/12/2020 9:11:35 PM (12m 57:		
	🗁 🖃 SQL Replicator File System Delta	4 processes, 40 threads		
	└─ Memory Usage	170 MB of 7,168 MB		
	└─ CPU Load	0.04%		
	└─ Start Time	3/12/2020 9:12:34 PM (11m 57:		
	□ = SQL Replicator Pervasive Trace Log	2 processes, 23 threads		
	└─ Memory Usage	95 MB of 7,168 MB		
	└─ CPU Load	30.73%		
	└─ Start Time	3/12/2020 9:12:34 PM (11m 58:		
	□ = SQL Replicator Row Delta	8 processes, 260 threads		
	└─ Memory Usage	509 MB of 7,168 MB		
	└─ CPU Load	0.09%		
	└─ Start Time	3/12/2020 9:12:35 PM (11m 57:		
	🗁 🖛 🛢 SQL Replicator Bulk Copier	4 processes, 126 threads		
	└─ Memory Usage	356 MB of 7,168 MB		
	└─ CPU Load	5.80%		
	└─ Start Time	3/12/2020 9:12:35 PM (11m 57:		
	C ⇒ SQL Table Replicator	4 processes, 116 threads		
	└─ Memory Usage	157 MB of 7,168 MB		
	└─ CPU Load	0.09%		
	└─ Start Time	3/12/2020 9:12:35 PM (11m 57:		
	Server	115 processes, 1,937 threads		
	└─ Memory Usage	7,409 MB of 7,168 MB		
	└─ CPU Load	97.28%		
	└─ Start Time	3/6/2020 5:43:15 PM (6d 03h 4		
	└─ Model	Microsoft Corporation Virtual N		
	└─ CPU Туре	Intel® Xeon® CPU E5-2673 v3		
	└─ CPU Count	2 cores		
	└─ System Disk (C:) Usage	56 GB of 127 GB	Ref (1999 AND 200 (1999 AND	
	└─ TEMP Disk (C:) Usage	56 GB of 127 GB	Rea 1999 AND 802 1999 AND	
	▼ Redis Server	1 process , 5 threads		
	L Memony Usage	20 MR of 7 168 MR	NUTROUGH DOOLOGIN TO CONSIGNATION	~

## **Required Windows services**

In addition to the services required to run your Sage 300 CRE software program, the following services must be running in order for Sage SQL Replicator to work properly:

Windows service	Comment
Sage SQL Replicator Service	<ul> <li>Installed on the Sage 300 CRE Accounting server when the company configuration database is created in SQL.</li> </ul>
	• Uses the Local System account as the default Log on account. See "Specify the account for Sage SQL Replicator Service" for instructions on how to change the account that runs this service.
	<ul> <li>Automatically starts when you click Start in the Configuration Manager.</li> </ul>
Sage SQL Replicator Redis Service	<ul> <li>Runs on the Sage 300 CRE Accounting server.</li> <li>Manages change queues.</li> <li>Is used for continuous replication.</li> <li>Automatically starts when you click Start in the Configuration Manager.</li> </ul>

Windows service	Comment
Sage Worker Engine	Runs on the Sage 300 CRE Accounting server and is required for Sage Construction Central and Mobile Intelligence.
SQL Server (SAGE300CRE)	• The text in parenthesis represents the name of your SQL instance.
SQL Server Agent (SAGE300CRE)	• These services run on the server where the SQL Server instance is installed.

## Specify the account for Sage SQL Replicator Service

Instead of using a Local System account on the server to run Sage SQL Replicator Service, you can specify a different account.



**NOTE:** After upgrading to Sage 300 CRE, the **Run-As Account** for Sage SQL Replicator may be removed from System Administrator. If needed, use the steps outlined below to change the account for running the Sage SQL Replicator Service.

- If the replication process is running, stop it—open Configuration Manager and click the Stop button on the Settings tab.
- 2. Open Windows services (in the Windows search box type services.msc).
- 3. Locate the service called Sage SQL Replicator Service. Right-click on this service and select Properties.
- 4. Go to the Log On tab. Select This account and enter the account name and password. This account must have the proper permissions to the Sage 300 CRE company data folders being replicated and also to the TIMBERLINE OFFICE share folder (this share folder is on your Sage 300 CRE Accounting server, and installed to ProgramData\Sage by default).
- 5. Click OK.

Sage SQL R	eplicat	or Service P	roperties	(Local Com	puter)	×
General L	.og On	Recovery	Depender	ncies		
Log on as	c					
	System	account				
Allo	ow servi	ce to interac	t with desk	top		
This a	ccount:	A	dmin	Ι	Brow	se
Passw	ord:	•••	••••••	•••••		
Confir	n passw	ord:		•••••		

6. To resume replication, open Configuration Manager and click the Start button on the Settings tab.

## **SQL Reporting views**

Sage SQL Replicator creates several views and stored procedures for reporting purposes.

- When you generate Crystal reports designed with a data source in Sage 300 CRE with the **Use SQL** check box selected or in Mobile Reports, your software automatically switches to a SQL data source and uses the appropriate views to return the information.
- Certain Mobile Dashboard reports rely on reporting views and stored procedures to generate information.



WARNING: Reporting views and stored procedures rely on data replicated into SQL. If you choose not to include all database tables for replication, certain views and stored procedures will not work.

The views created by SQL Replicator are categorized into four groups, based on the type of table naming selected in the Timberline Data Source DSN:

- Std views (based on Standard table naming).
- Custom views (based on Custom table naming).

- Dict views (based on Dictionary table naming).
- **Reports** views—used by certain Mobile Dashboard reports. See <u>Sage Knowledgebase article 91722</u> to find out which tables are needed for the **Reports** views and stored procedures.

## Security

In order to allow users access to the SQL Server data through reports or Mobile solutions, you must grant the appropriate task permissions in Sage 300 Construction and Real Estate **Security Administration**.



The replication process enforces Sage 300 Construction and Real Estate security settings in the SQL Server data. Any user, role, task, company, and record permissions established in Sage 300 Construction and Real Estate are respected when users access the SQL Server data through Sage Construction Central, reports, or in any other manner.

The initial replication process copies the security settings into the SQL Server instance. When you make changes to the security setup afterwards, such as adding new users, you must manually synchronize the changes with the SQL Server data. In System Administrator, on the **Replicator Settings t**ab, click **Sync Security**.

3			System Administrator -	Sage 300 Construction and Real Estate	_ 🗆 X
	<b>sage</b> 300 (	Constructi	ion and Rea	al Estate	Version: •
	Replicator Settings	Connected: LSSVR25-M	IP\SAGE300CRE (BEST\UNA	AT) SQL Server 2016 SP1 Express Edition (64-bit)	
	Backup	Company	Database	Pervasive Data Folder	
	Restore	Gold Coast Group	GoldCoastGroup	\\lssvr25-mp\Timberline Office\Data\PM Sample Data\	Configure
		Timberline Construction	n TimberlineConstruction	\\lssvr25-mp\Timberline Office\Data\Construction Sample Data\	Configure
			Synci Security settings, users the replicating database to complete if the replic Databases that are not next replication. Click [View Status] for	hronize Security Items X  is, and roles are marked for synchronization with see. Please allow a few moments for this process ication is running. currently replicating will be synchronized on the details.  OK  SOL Database. Tumberling Conduction	
		Description: Data Folder: \\lssvr2	ine construction	Construction Sample Data\	Repair Services

Sage 300 Construction and Real Estate user names and roles, along with their task and company permissions are copied to each SQL Server database.



For each Sage 300 Construction and Real Estate user name, a SQL Server login is created with SQL Server Authentication. The passwords (in Sage and in SQL Server) are automatically synchronized when the user logs into Sage 300 Construction and Real Estate for the first time after replication. This lets you use your Sage 300 Construction and Real Estate credentials whenever you access the SQL Server data in on-premises Sage and third party applications such as Microsoft Excel or Access.



Anyone who accesses the SQL Server data through Sage Construction Central must have a Windows user name associated with their Sage 300 Construction and Real Estate user setup. This is because Sage Construction Central requires Windows authentication—you log on using your Windows credentials.

User Details		
🚽 Save Change	s 🖕 Cancel Changes	
User name:	TomS	
	Logon for Sage Timberline Office (for example, JDoe)	
Full name:	Thomas Sage	
	(For example, John Doe)	
Windows user:	Domain \ThomasS	Browse
	Domain\user name	

## Changes to the replication settings

You may want to change the replication settings after the initial replication is finished. For example, to alter the replication frequency, the table selection included for replication, or to stop the replication for a company. For these types of changes, you can open **Configuration Manager** directly from the **ConfigurationManager.exe** file instead of through **System Administrator**. This file is stored on your Accounting server in this default location: C:\Program Files(x86)\Sage\SageSQLReplicator.

Any changes to the replication settings will only take effect after you restart the replication process. To restart the replication, you must click **Stop** and then **Start** on the **Settings** tab of **Configuration Manager**.



**NOTE:** During each **Configuration Manager** session, the message to remind you to restart the replication after making a change appears only once.

#### > To change the replication frequency or table selection

- 1. Open Configuration Manager.
- 2. On the **Settings** tab, click the **Settings** button next to the company for which edit the replication.
- 3. Make the necessary changes in the Table Selection window and click Save.
- 4. Restart the replication process—click **Stop**, and when the **Start** button becomes available, click it.

#### To stop the replication for a company

- 1. Open Configuration Manager.
- 2. On the **Settings** tab, click the **Settings** button next to the company for which to cease replication. The **Table Selection** window opens.
- 3. Clear the Enable Replication check box to exclude the company from the replication process.
- 4. If you want to remove this company from Configuration Manager, click Delete from Configuration. Once the configuration is deleted, the company no longer appears on the Settings tab but the database remains in SQL Server. If you want to remove the database from SQL Server, you can do so with MS SQL Server Management Studio.
- 5. Click Save.
- 6. Restart the replication process—click **Stop**, and when the **Start** button becomes available, click it.

## Replicate a new company

In addition to the current companies you are replicating, you may want to add another company in the future. To do so:

- 1. You must open **System Administrator** to create the configuration database for the new company first (see page 25).
- 2. Next, you use **Configuration Manager** to specify the replication settings for the company (see page 27).
- 3. Last, you must restart the replication to include the new company in the operation.

# Schema changes in the Sage 300 Construction and Real Estate data

As you learned, when SQL Replicator creates the configuration database for each company, it reads the Sage 300 Construction and Real Estate schema so that it can create the schema for the corresponding database in SQL. If there are changes to the schema, SQL Replicator does not automatically pick them up, resulting in some columns or tables being skipped by replication.

Examples of schema changes include:

- Upgrading to a new version of Sage 300 CRE that has database changes. Refer to the Release Notes for database changes.
- Changes to custom descriptions. For example, you change the default name for the field **AP Misc Deduction**.
- Changes or additions of custom fields.
- Creating a new file, such as an archive file.
- Changes to file or record security.

When you have schema changes, you must use **Configuration Manager** to regenerate the configuration database for the company to update the schema. To do so:

- 1. Open System Administrator and click Configure.
- 2. On the Settings tab of Configuration Manager, click Stop.
- 3. Click Settings for the company which has schema changes to open the Table Selection window.
- 4. Click Actions and select Regenerate Tables.



5. When the continue prompt appears, click **Yes** to start the process of re-reading the schema and updating the SQL schema.



After the **Regenerate Tables** process is finished, any new tables that were added to the SQL schema are automatically selected for replication. If needed, you can make changes to the table selection.

- 6. Click Save.
- 7. Click the **Start** button to restart the replication.



NOTE: If there are database changes when you upgrade your Sage software, you must regenerate the tables and restart the replication for all your companies to update the schema.

## Repair Sage-managed SQL system accounts

Sage creates several different SQL system accounts to manage the functions used by SQL Replicator and Mobile Intelligence solutions. In some cases, these Sage-managed SQL accounts may become out of sync with SQL Replicator and the Mobile features, causing the processes to stop.

If the Sage Worker Engine stops and you are unable to start it or you are directed by Sage Support, click the **Repair Services** button in the **System Administrator** to repair the Sage-managed SQL system accounts used by SQL Replicator, Mobile Reports, and Mobile Dashboards.

	System Administrator - Sage 300 Construction and Real Estate					_ <b>D</b> X
<b>sage</b> 300 (	Construction and Real Estate					Version:
Replicator Settings	Connected: LSSVR25-MP\SAGE300CRE (BEST\UNAT) SQL Server 2016 SP1 Express Edition (64-bit)					
Backup	Company	Database	Pervasive Data Folder			
Restore	Gold Coast Group GoldCoastGroup \\Issvr25-mp\Timberline Office\Data\PM Sample Data\			ata\	Configure	
	Timberline Construction TimberlineConstruction \\\ssvr25-mp\Timberline Office\Data\Construction Sample Data		Sample Data\	Configure		
	Company: Timberline Construction SQL Database: TimberlineConstruction					
	Description:					
	Data Folder: \\Issvr25	-mp\Timberline Office\Data\0	Construction Sample Data\			
				Link to Mobile	Sync Security	Repair Services

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