

Sage 300 ERP

Sage 300 ERP 2014

Upgrade Guide



sage

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Contents

Package Contents	2
Minimum System Requirements	3
Server and Workstation Requirements	3
Creating DSNs for Sage 300 ERP Data on 64-Bit Windows	3
Optional System Requirements	3
Web Deployment of the Desktop Client	3
Visual Basic for Applications (VBA)	4
Sage 300 ERP Portal	5
Sage 300 ERP Intelligence Reporting	5
Recommended Setup on Windows	6
Version Compatibility	6
Upgrading from Version 5.5, or Earlier	7
Alert when Migrating from Pervasive to Microsoft SQL	7
Alert when Running Help	8
Alert when Upgrading Sage 300 ERP Intelligence Reporting	8
Applying for Activation Codes	8
Before Upgrading to Sage 300 ERP 2014	9
Step 1: Make Sure You Have 2014 Versions of All Programs	9
Step 2: Run Day End Processing	10
Step 3: Post Batches in Accounts Receivable and Accounts Payable	10
Step 4: Save Customized Reports, Macros, and Other Customizations	10
Step 5: Print the Account Group Report (Optional)	10
Step 6: Install and Configure Internet Information Services	10
IIS for Windows Vista and Windows 7	11
IIS for Windows 2008 and Windows 2012	11
Upgrade Steps	13
Uninstall the Earlier Version of System Manager	14
Step 1: Install Sage 300 ERP Programs	14
Installing the Programs	14
Entering License Information	16
Step 2: Install Product Updates	18
Step 3: Activate Your Data for Version 2014 Applications	18
After Activating	19
General Ledger Update Notes	19
Preparing Your Accounts for Use with Data Snapshots	19
System Manager Update Notes	21

Sage 300 ERP Intelligence Reporting Update Notes	22
Running Intelligence Reporting for the First Time	22
Restoring Customized Reports and Settings from Your Previous Version	22
Configuring the Sage 300 ERP Portal	23
Configuring a Microsoft SQL Server Express Database	25
Starting the Sage 300 ERP Portal	25
What's New in Sage 300 ERP 2014	25

Sage 300 ERP 2014 Upgrade Guide

This Upgrade Guide provides instructions for upgrading earlier versions of System Manager and applications to Sage 300 ERP 2014. You should review the following sections carefully to ensure that the upgrade proceeds smoothly:

- Minimum System Requirements
- Version Compatibility
- Upgrading from Version 5.5, or Earlier
- Applying for Activation Codes
- Before Upgrading to Sage 300 ERP 2014
- Upgrade Steps
- After Activating
- Configuring the Sage 300 ERP Portal

You should refer to the Sage 300 ERP Release Notes on the Sage 300 ERP 2014 DVD for supplementary information and information that was not available when this *Upgrade Guide* was published.

For information on the changes and new features in this version, see *What's New in Sage 300 ERP 2014*, which is available on the installation DVD and from the Sage 300 ERP\Docs\62A program folder after you install Sage 300 ERP.

If you will be using Sage CRM with Sage 300 ERP, refer to the *Sage CRM Integration Upgrade Guide* for information about upgrading and a list of changes to that program. For system requirements and instructions on integrating Sage CRM with Sage 300 ERP, see the *Sage CRM Integration Guide*.

Package Contents

The Sage 300 ERP 2014 DVD includes the following products:

- Sage 300 ERP 2014, which includes:
 - Multicurrency Accounting
 - Transaction Analysis and Optional Field Creator
 - LanPak
 - Sample data (SAMLTD, SAMINC, and SAMSYS):
 - Installed in the \SAMPLE folder, for Pervasive PSQL databases
 - Installed in the \SAMDATA folder (in Database Load format), for Oracle and MS SQL databases
 - General Ledger
 - G/L Consolidations
 - Accounts Receivable
 - Accounts Payable
 - Intercompany Transactions
 - Inventory Control
 - Serial Numbers and Lot Tracking (included with Inventory Control, but licensed separately)
 - Order Entry
 - Purchase Orders
 - Project and Job Costing
 - Payment Processing and Sage Exchange
 - Sage Fixed Assets Integration
 - Sage 300 ERP Intelligence Reporting
 - Number changers (Account Code, Vendor, Customer, Item)
- Sage CRM Integration for Sage 300 ERP
- Additional products, which include:
 - Sage 300 ERP Sales Analysis
 - Sage 300 ERP Ops Inquiry

- Sage 300 ERP Payroll (Canadian and US)
- Sage 300 ERP (web) Portal
- Language packs in French, Spanish, Simplified Chinese, and Traditional Chinese

Minimum System Requirements

The information in this section was current when we released Sage 300 ERP 2014. If you do not find the information you need, check the *Compatibility Guide* on the [Sage Customer Portal](#).

Server and Workstation Requirements

For a complete and up-to-date list of hardware and operating system requirements for workstations and servers, check the *Compatibility Guide* on the [Sage Customer Portal](#).

Creating DSNs for Sage 300 ERP Data on 64-Bit Windows

If you are using a 64-bit Windows system, the default ODBC Data Source Administrator (available from the Administrative Tools menu) lets you configure only 64-bit data sources.

However, Sage 300 ERP is a 32-bit application. To create data sources for Sage 300 ERP, you need to browse for the 32-bit version of the ODBC Administrator. You can find the 32-bit ODBC Administrator in the following location:

C:\WINDOWS\SysWOW64\odbcad32.exe

Optional System Requirements

Web Deployment of the Desktop Client

DCOM not supported

This version does not support DCOM remoting for Web Deployment.

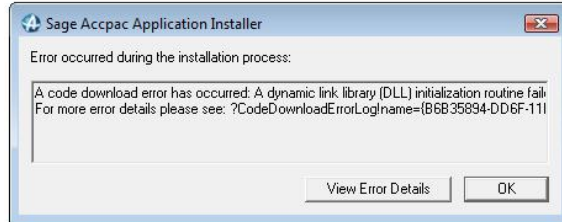
Web Deployment on 64-bit Windows

If you are setting up Web Deployment on 64-bit Windows, you must first enable 32-bit application support in Internet Information Services (IIS). Refer to the following Microsoft article on the steps to do this before setting up Web Deployment:

- <http://www.iis.net/configreference/system.applicationhost/applicationpools/applicationpooldefaults>

Web Deployment
with Windows Vista
clients

If you use Windows Vista machines as clients for Web Deployment, you may encounter the following error the first time you use the web desktop when the system is trying to install the Microsoft XML Parser:



You need to update your client system with Microsoft SqlXml 3.0 Service Pack 3:

- <http://www.microsoft.com/downloads/details.aspx?familyid=51D4A154-8E23-47D2-A033-764259CFB53B&displaylang=en>

The web desktop should perform correctly once this update is applied.

Web Deployment
under Windows 7

If you are using Windows 7, note that you cannot print reports for web-deployed Sage 300 ERP under Windows 7. However, you can still print reports from the Sage 300 ERP desktop.

Running web-
deployed G/L
Statement
Designer

If you are using Web Deployment with .NET Remoting, the G/L Statement Designer can fail with an "Initializing FR Error (30): Fail in starting Statement Designer" error when you try to run the Statement Designer from a browser client.

This problem occurs because Microsoft Excel is loading an incorrect version of the Microsoft .NET Framework. You should install the Update for Office 2003 as outlined in the Microsoft Knowledge Base article KB907417. The update must be installed on the browser client machine.

Visual Basic for Applications (VBA)

System Manager 2014 (internally known as version 6.2A) installs and uses Microsoft VBA 6.4. This version is compatible with macros created using prior versions of VBA.

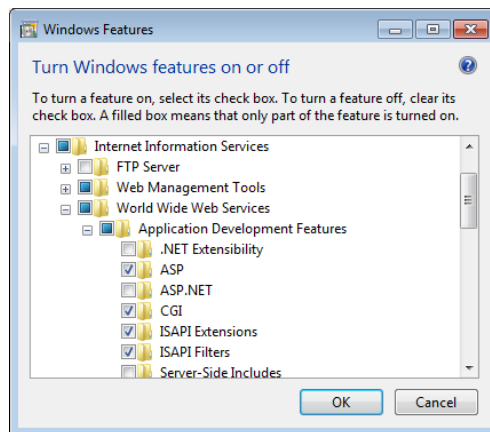
Sage 300 ERP Portal

Before you install the Sage 300 ERP Portal:

- Ensure that Microsoft's Internet Information Services (IIS) is installed on the server that will host the Sage 300 ERP Portal.

If IIS is not installed, you must install it **before** you attempt to install the Sage 300 ERP Portal. Follow the steps described in "Step 6: Install and Configure Internet Information Services," to install and configure IIS.

- For Windows 7 and Windows 8, ensure that ASP, CGI, ISAPI Extensions, and ISAPI Filters are selected Windows features (under World Wide Web Services' Application Development Features), as shown here:



IMPORTANT!

The Sage 300 ERP Portal supports *only* Microsoft SQL Server database formats. If you are upgrading from Sage ERP Accpac 6.0, you must re-create your portal database using Microsoft SQL Server. For detailed instructions, refer to the *Sage 300 ERP Installation and Administration Guide*.

IMPORTANT!

Crystal-based reporting is not supported in the Sage 300 ERP Portal for company data stored in an Oracle database.

Sage 300 ERP Intelligence Reporting

Sage 300 ERP Intelligence Reporting is compatible with Microsoft SQL and Pervasive PSQL.

Recommended Setup on Windows

You must install Sage 300 ERP outside the default path (C:\Program Files\Sage\Sage 300 ERP).

If you install to the default path, you may have problems with security because Windows does not allow more than one user to open Sage 300 ERP.

Recommendation

We recommend changing the Program and Shared Data directories to locations other than the default. For example:

Programs

- For Programs, install to: **C:\Sage 300 ERP.**

Shared Data

- For Shared Data, install to: **C:\Sage 300 ERP Data.**

Version Compatibility

You must upgrade all Sage 300 ERP programs to version 2014 (internally known as 6.2A) at the same time. Sage 300 ERP 2014 programs do not work with programs from earlier versions.

In addition, note that:

- You must upgrade all programs that you have been using with Sage 300 ERP to compatible versions.
- If you are using Sage CRM with Sage 300 ERP, see the *Sage CRM Integration Upgrade Guide* for important information about version compatibility.
- Sage 300 ERP Payroll 2014 (7.1A) is compatible with Sage 300 ERP 2014. However, it must be installed separately.

Note: Sage Payroll requires Bank Services, Tax Services, and G/L Subledger Services.

Upgrading from Version 5.5, or Earlier

If you are using Sage ERP Accpac version 5.5, or earlier versions, note that you cannot upgrade your data directly to Sage 300 ERP 2014.

WARNING: You cannot use the 2014 version of System Manager to upgrade Sage ERP Accpac programs from version 5.5, or earlier.

Also, you cannot use version 5.6 of System Manager to upgrade Sage ERP Accpac programs from version 5.2, or earlier.

Attempting to do so will cause your system to crash, and will corrupt your data.

If you are using Sage ERP Accpac version 5.5, 5.4, or 5.3, you must update your data to version 5.6 *before you install the 2014 version of System Manager.* See the *Upgrade Guide* for version 5.6 for information about upgrading to that version.

If you are using Sage ERP Accpac version 5.2, or earlier versions, you must upgrade your database to an intermediate version (version 5.3, 5.4, or 5.5) *before you install System Manager version 5.6.* See the *Upgrade Guide* for the intermediate version for information about upgrading to that version.

Alert when Migrating from Pervasive to Microsoft SQL

If you are migrating your database from Pervasive to Microsoft SQL, and your database contains Inventory Control items that use units of measure with the same name but with mixed cases (for example, both "EACH" and "Each," or another combination), we recommend that you choose a binary collation method for your SQL database. If you try to load data with mixed cases and you use a non-binary collation method, Database Load will fail.

Alternatively, you can repair your data, standardizing on one unit of measure, before using Database Load.

Alert when Running Help

If you run Windows with your browser security set to High, you may receive the following message about Web page security when you try to open Sage 300 ERP help:



To accept Sage 300 ERP help as a trusted site, click the **Add** button.

Alert when Upgrading Sage 300 ERP Intelligence Reporting

If you were using Sage Accpac Intelligence (SAI) with a previous version of Sage ERP Accpac, do not change the company database ID.

If you change the database ID, and then upgrade to Sage 300 ERP 2014 Intelligence Reporting, you may lose all the security roles set up for Intelligence Reporting in the previous version.

Applying for Activation Codes

Activation code

You need activation codes to use Sage 300 ERP products, including upgrades. However, you can run Sage 300 ERP for up to 30 days while you await your activation codes.

You can obtain activation codes from the Sage Customer or Partner Portal.

If you are a Sage customer:

1. Log in to your account at <https://customers.sagenorthamerica.com/irj/portal/anonymous/login>.

If you don't have an account, use the self-registration tool on the Customer Portal login page to create one.

2. On the Support menu, click **Self Service**.
3. Click the **My Products** tab.
4. Follow the instructions on the My Products tab to display and print the Details Sheet.

If you need assistance with the Customer Portal, email Customer.Portal@sage.com, or call 1-877-828-6372.

If you are a Sage partner:

1. Log in to your account at <https://partners.sagenorthamerica.com/irj/portal>.

If you don't have an account, contact the portal administrator at your company, or contact Sage.

2. Click **Customers > Details Sheet**.
3. Click **Show Advanced Search**.
4. Enter an account ID, and then click **Go**.
5. On the Details Sheet, click the **Products Details** tab to view the customer's activation codes.

If you need assistance with the Partner Portal, email Partner.Portal@sage.com, or call 1-877-828-6372.

Before Upgrading to Sage 300 ERP 2014

You must perform the following steps, in order, before upgrading to Sage 300 ERP 2014. If you don't take these steps, you will not be able to activate your software.

After upgrading

For instructions on steps to take after upgrading, see "After Activating," on page 19 of this notice.

Step 1: Make Sure You Have 2014 Versions of All Programs

Make sure you have version 2014, or compatible versions, of all Sage 300 ERP programs and other programs you use with Sage 300 ERP.

WARNING!

You must upgrade all Sage 300 ERP programs at the same time.

Step 2: Run Day End Processing

Run Day End Processing in Inventory Control or, if you have a standalone Purchase Orders system, run Day End Processing in Purchase Orders.

Step 3: Post Batches in Accounts Receivable and Accounts Payable

You must post all open batches in Accounts Receivable and in Accounts Payable.

Step 4: Save Customized Reports, Macros, and Other Customizations

Move customized reports to another folder, or they will be overwritten during the installation process.

For example, if you created customized financial reports in General Ledger, copy them from GL60A\ENG or GL61A\ENG to another location, and then copy them to GL62A\ENG after installing the upgrade.

Also, save macros and any other customizations to a new folder.

Note that macros work with the Sage 300 ERP desktop program, and are not available in the Sage 300 ERP Portal.

Step 5: Print the Account Group Report (Optional)

Revised Account Groups

In version 6.0, we modified the standard set of account groups to support General Ledger "snapshots" in a new web Portal.

If you used account groups in version 5.6 and you want to use these snapshots in Sage 300 ERP 2014, you may need to reassign some of your existing accounts to new account groups.

Print the Account Group Report to use as a reference when reassigning accounts, after installing and activating Sage 300 ERP 2014.

Step 6: Install and Configure Internet Information Services

The Sage 300 ERP Portal requires Microsoft Internet Information Services (IIS). If you plan to use the portal, ensure that IIS is installed on the portal server before you install Sage 300 ERP 2014.

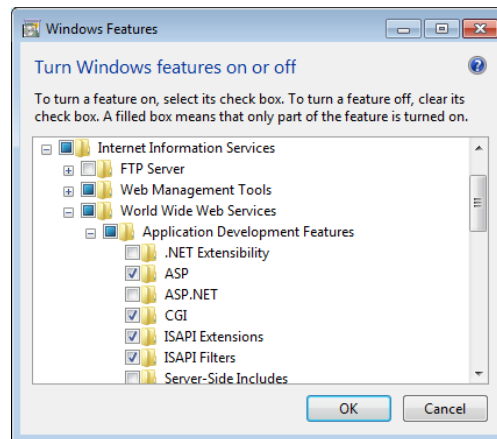
You install and configure IIS a little differently, depending on your version of Windows. If you need to install IIS, follow the instructions for your computer's operating system.

IIS for Windows Vista and Windows 7

To install and configure IIS for Windows Vista and Windows 7:

1. In Windows' **Control Panel**, click **Programs and Features**.
2. Click **Turn Windows Features On or Off**.
3. In the **Windows Features** form, expand **Internet Information Services > World Wide Web Services > Application Development Features**.
4. Under Application Development Features, select the following options:
 - ASP
 - CGI
 - ISAPI Extensions
 - ISAPI Filters

When selected for Windows 7, these options appear, as follows:

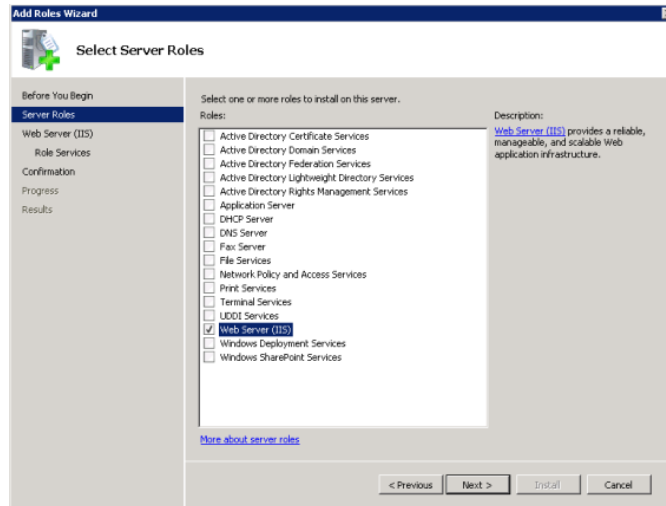


IIS for Windows 2008 and Windows 2012

To install and configure IIS for Windows 2008 and Windows 2012:

1. From Windows' Control Panel, click **Administrative Tools > Server Manager**.
2. In the Server Manager, under Roles, click **Add Roles**.

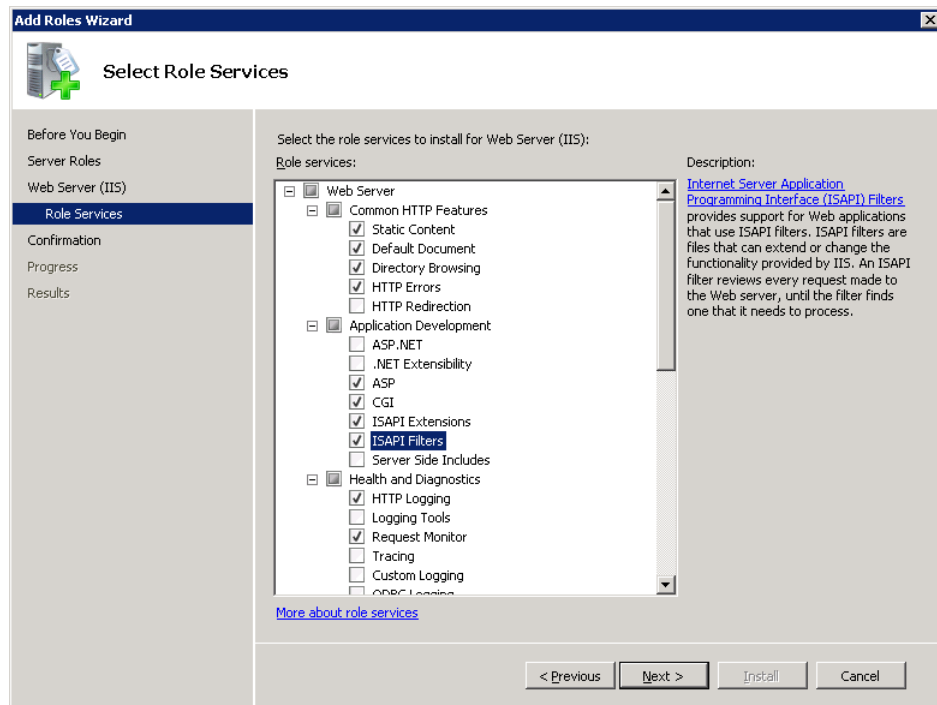
3. On the Select Server Roles page, click **Web Server (IIS)**, as shown in the following screen:



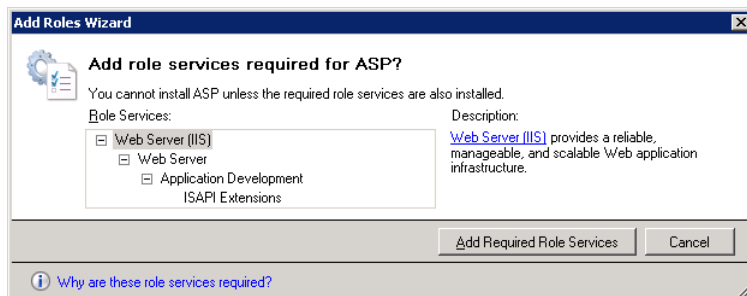
4. Click **Next**, and then select the following Role Services:

- ASP
- CGI
- ISAPI Extensions
- ISAPI Filters.

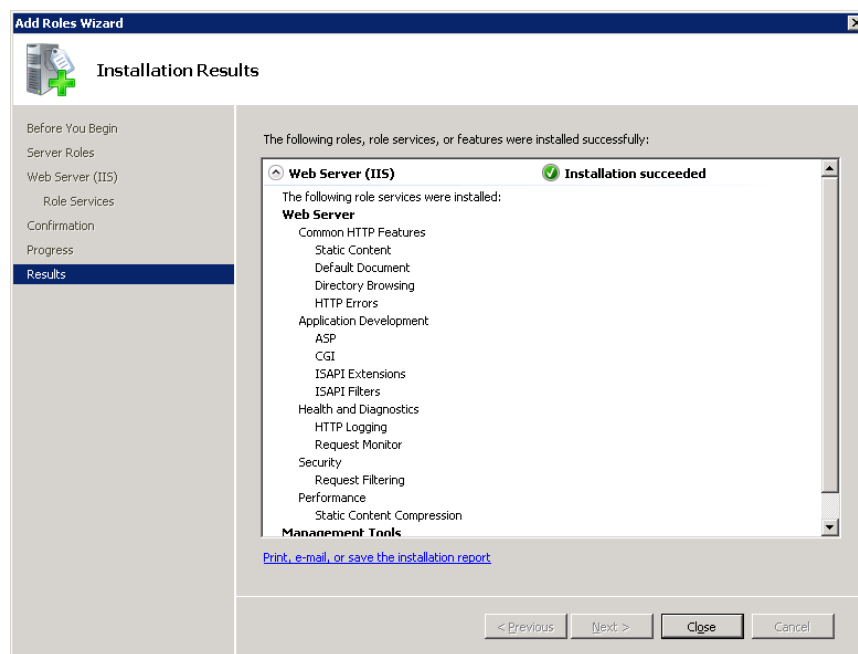
The Select Role Services page should now appear as follows:



5. Click **Next**.
6. If the following prompt to install required services appears, click **Add Required Role Services**.



The Results page should appear, as follows:



Upgrade Steps

Before you proceed with the steps in this section, we recommend that you:

- Check data integrity in your previous version, and correct any errors.
- Back up your data.

Uninstall the Earlier Version of System Manager

We strongly recommend that you uninstall System Manager before installing the latest version to ensure a clean installation of the new version.

Step 1: Install Sage 300 ERP Programs

After you have performed the steps described in the previous section, you can install Sage 300 ERP System Manager, System Manager Components, Sage 300 ERP applications, the Sage 300 ERP Portal, and any desired language packs.

You install Sage 300 ERP components in one continuous process, consisting of two phases:

1. Installing the programs, the Sage 300 ERP Portal, and any desired language packs.
2. Entering license information.

Installing the Programs

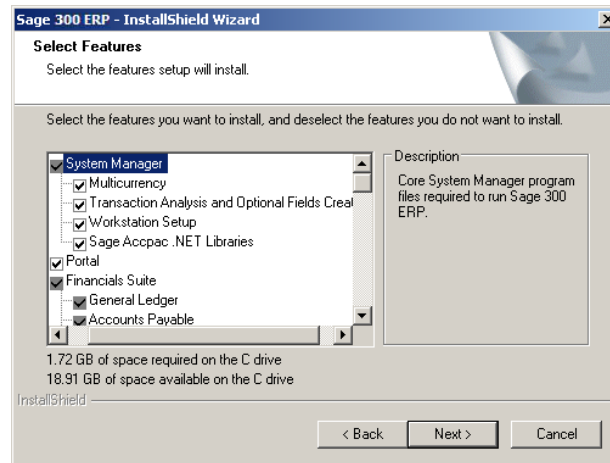
1. Insert the Sage 300 ERP installation DVD into your DVD drive.
If the installation screen does not appear automatically, go to the DVD's root directory (for example, d:\), and run LAUNCH.EXE.
2. On the installation screen, click Sage 300 ERP.
3. On the Sage 300 ERP installation screen, click Sage 300 ERP.
4. On the Welcome screen, click Next.
5. Click the option to accept the license agreement, and then click Next.
6. Select the geographical region where you are installing the software, and then click Next.
7. For the client information, enter the 7-digit or 10-digit client ID and the company name to use for registration, and then click Next.
8. To provide additional information for registration, enter the names of the company contact, software dealer, and certified consultant, and then click Next.
9. If the next screen asks you to allow us to collect anonymous data, click Yes or No, as you prefer, and then click Next.
10. Select the edition of Sage 300 ERP you require, and then click Next.

- Specify the names and locations of your program and data folders, and then click Next.

Note: Be sure to install Sage 300 ERP outside the default path (C:\Program Files\Sage\Sage 300 ERP). See the section "Recommended Setup on Windows," for more information.

All-in-one installation process

The Select Features screen appears, as follows:



- On the Select Features screen, select the features and applications you want to install at this time.

Program dependencies

Keep in mind that most of the applications require you to install others. All of the applications require core System Manager files.

(Web) Portal feature

The Portal feature is selected automatically. This option installs components required to support the Sage 300 ERP Portal.

Note: Before installing the portal, you must have installed IIS, as described in "Step 6: Install and Configure Internet Information Services," in the previous section.

The following list shows any additional requirements in parentheses for each application:

- Bank Services (Tax Services, G/L Subledger Services)
- General Ledger (Sage 300 ERP Intelligence Reporting)
- Accounts Payable (Bank Services, Tax Services, G/L Subledger Services)
- Accounts Receivable (Bank Services, Tax Services, G/L Subledger Services)

- Inventory Control (G/L Subledger Services)
- Order Entry (Accounts Receivable, Inventory Control, Bank Services, Tax Services, G/L Subledger Services)
- Payment Processing (Accounts Receivable, G/L Subledger Services, Bank Services, Tax Services, Order Entry, Sage Exchange)
- Purchase Orders (Accounts Payable, Bank Services, Tax Services, G/L Subledger Services)
- Project and Job Costing (Accounts Payable, Accounts Receivable, Bank Services, Tax Services, G/L Subledger Services)

13. After you select the programs and features you need, click Next.
14. On the next screen, in the Program Folder field, type the location on the Start menu where you want Sage 300 ERP to appear, and then click Next.
15. Click Install.

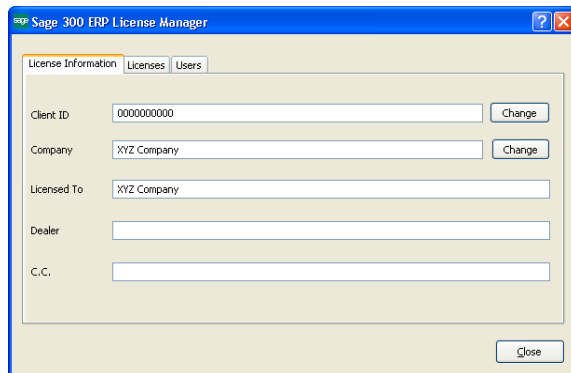
Enter activation codes

Once installation has finished, the License Manager appears. Follow the instructions in the next section to enter license information.

Entering License Information

The next steps continue from the preceding section, "Installing the Programs."

The License Information tab is filled in with information you entered during installation.



Note: Do not change the company name unless you need to change the business entity to which the programs are registered.

If you change the company name, the licenses will appear Unauthorized, until you apply for and enter new activation codes.

1. If you have activation codes for your Sage 300 ERP programs, click the **Licenses** tab, and then, for each Sage 300 ERP program:
 - a. Double-click in the **Serial Number** column, and then type the serial number.
 - b. Double-click in the **Activation Code** column, and then type the activation code.

If you don't yet have activation codes, you can use the 30-day temporary licenses created during installation, and record the permanent code later.

2. If you installed Sage 300 ERP Intelligence Reporting Analysis or Sage 300 ERP Intelligence Reporting Connector, enter their activation codes on the Licenses tab.

Note: The Analysis and Connector programs are not available with a 30-day license. You must have a permanent license to use them.

3. Click the **Users** tab, and then, for each LanPak you have installed, double-click in the associated column and enter, in order, the:
 - a. **License Type.** Select LanPak. (Do not select a database-specific LanPak.)
 - b. **Count.** Type the number of users who require Sage 300 ERP access for this installation.
 - c. **Serial Number** (for the LanPak).
 - d. **Activation Code** (supplied by Sage).

If no LanPaks are listed on the tab, click in the blank space to create a new line for a temporary license, and then enter the license type, followed by the count.

LanPak

❑ **IMPORTANT:** You must record at least one LanPak license to use Sage 300 ERP 2014.

For Sage 300 ERP Intelligence Reporting, one Report Manager license for one user is free with Sage 300 ERP 2014. If you have additional licenses for Report Manager and Report Viewer, enter their activation codes in the Activation Code column.

4. Click **Close**.
5. Click **Finish** to close the Installation wizard.

Step 2: Install Product Updates

IMPORTANT!

To avoid possible data corruption issues, you must install all released product updates for version 2014 **before** activating your Sage 300 ERP applications.

Before activating, check for available product updates for version 2014, and install any product updates you have not already installed.

Step 3: Activate Your Data for Version 2014 Applications

In version 2014, you must use the desktop program to activate Sage 300 ERP applications, as follows:

1. In the Administrative Services folder, double-click the **Data Activation** icon.
2. When asked whether you are ready to proceed with activation, click **Yes**.
3. In the Data Activation form that appears, select the check box for each application for which you want to activate data.

Note: If you use Sage 300 ERP Payroll, you require Sage 300 ERP 2014 Payroll (7.1A). If you have been using an earlier version, you will have to install the current version and reactivate your payroll data.

The activation program automatically selects any applications that must be activated first, and then checks your data to ensure that it can activate them.

Most Sage 300 ERP applications are interdependent. If you clear the selection for an application that others require, the activation program also clears the selection for the dependent applications. For example, if you clear the selection for Accounts Payable, but Purchase Orders and Project and Job Costing are selected, the program also clears the selections for Purchase Orders and Project and Job Costing. (See "Step 1: Install Sage 300 ERP Programs" for information about dependencies.)

Note: Sage 300 ERP Options products are not part of the multi-application data activation. If you select Sales Analysis, Ops Inquiry, or a number change program, you are prompted to activate that program immediately.

4. If you receive a message saying that you cannot activate an application at this time:
 - a. Close the Data Activation form.
 - b. Correct the problems described in the error message.
 - c. Reopen the Data Activation form, and continue the process.
5. Once you have finished selecting applications and entering required information, click the **Activate** button.

After Activating

After activating applications, you should check data integrity for each application to ensure that the upgraded data contains no errors.

In addition, you must perform the tasks described in the next sections.

Bank Services Update Notes

If the data integrity check found errors for Bank Services, you must refresh transactions for the affected banks, as follows:

1. Open the Reconcile Statements form.
2. For each affected bank:
 - a. In the Bank Code field, type the bank code, or use the Finder or the navigation buttons to display it.
 - b. Click Calculate.
3. Check data integrity for Bank Services, again.

General Ledger Update Notes

Preparing Your Accounts for Use with Data Snapshots

One of the exciting features in Sage ERP Accpac 6.0, Sage 300 ERP 2012, and Sage 300 ERP 2014 is the ability to view graphic “snapshots” of your accounting data in a web Portal.

Snapshots show current accounting data graphically

The Income Statement and Balance Sheet snapshots provide instant pictures of your company’s current financial health. They can help you spot operational problems and guide your financial decisions.

Snapshot use group categories

These snapshots draw data from a set of group categories that are linked to your general ledger accounts through account groups. Group categories, introduced in Sage ERP Accpac 6.0, organize your accounting information especially for presentation in the Portal.

IMPORTANT: To use the snapshots, *you must* associate each General Ledger account with an appropriate group category *before* you configure the Income Statement and Balance Sheet snapshots. Otherwise, the snapshots will not represent your data accurately.

Revised Account Groups

If you have used account groups in version 5.6, note that in version 6.0, we modified the standard account groups that come with Sage 300 ERP. Therefore, you may need to reassign some of your existing accounts to new account groups, and assign the groups to the new group categories.

The option to use account groups must be turned on, first

If you have not used account groups previously, note that the Account Groups form appears only if the Use Account Groups option is selected in the G/L Options form.

If you used account groups in Sage ERP Accpac versions 5.6 or 6.0 and you plan to use the general ledger snapshots, you must first:

1. Ensure that all account groups are assigned to an appropriate category from the new set of group categories.

You assign group categories using the Account Groups setup form.

2. Ensure that all general ledger accounts are assigned to appropriate account groups.

Assign account groups to group categories

To assign account groups to group categories, you use the Account Groups form (available in the G/L Setup folder).

Note the following points:

- If you do not want to use general ledger data snapshots, you do not need to remap any accounts to new account groups and categories.
- Financial Reporter comes with a new set of sample statements that use the new account groups. If you want to use the new sample statements, you must ensure that your accounts use the new account groups.
- If you reassign accounts to new account groups, remember to adjust any custom reports that use account groups.
- If you don't want to use the new set of sample financial statements, you can still use the statements that shipped with earlier versions.

The following chart shows the standard account groups and categories that support the snapshots. Use these charts as a reference when remapping existing accounts to the new account groups.

Version 6.0/6.1 (2012)/6.2 (2014) Standard Account Groups and Categories		
Code	Group Description	Group Category
01	Cash and Cash Equivalents	Cash and Cash Equivalents
02	Accounts Receivable	Accounts Receivable
03	Inventory	Inventory
04	Other Current Assets	Other Current Assets
05	Fixed Assets	Fixed Assets
06	Accumulated Depreciation	Accumulated Depreciation
07	Other Assets	Other Assets
08	Accounts Payable	Accounts Payable
09	Provision for Income Taxes	Other Current Liabilities
10	Other Current Liabilities	Other Current Liabilities
11	Long Term Liabilities	Long Term Liabilities
12	Dividends	Other Liabilities
13	Share Capital	Share Capital
14	Shareholders' Equity	Shareholders' Equity
15	Revenue	Revenue
16	Opening Inventory	Cost of Sales
17	Purchases	Cost of Sales
18	Closing Inventory	Cost of Sales
19	Cost of Sales	Cost of Sales
20	Other Revenue	Other Revenue
21	Fixed Charges	Other Expenses
22	Other Expenses	Other Expenses
23	Depreciation Expense	Depreciation Expense
24	Other	Gains/Losses
25	Interest Expense	Interest Expense
26	Income Taxes	Income Taxes
—	—	—

System Manager Update Notes

Change user options

To let users open Sage 300 ERP using their Windows signon ID, change the authentication method for each user in the Users form.

See the System Manager help for instructions on adding users and setting up security.

Sage 300 ERP Intelligence Reporting Update Notes

Running Intelligence Reporting for the First Time

The first time you run Sage 300 ERP Intelligence Reporting, you must log in as the Windows administrator.

A user with Windows administrator privileges must register the ActiveX component, BICore.exe, that Intelligence Reporting requires. To register this component, open any Sage 300 ERP Intelligence Reporting form. Once the component is registered, other types of users can open these forms.

If you use workstation setup, you must also run Sage 300 ERP Intelligence Reporting workstation setup (located in BX62A\WSSetup) on every workstation where you will view and use Intelligence Reporting screens.

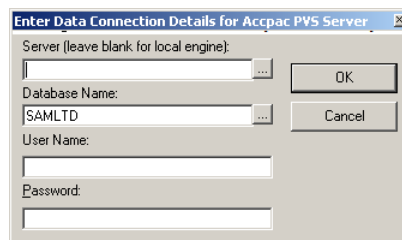
Restoring Customized Reports and Settings from Your Previous Version

If you used Intelligence Reporting (formerly known as Sage Accpac Intelligence) with Sage ERP Accpac 5.6 or 6.0, restore your customized reports and settings by copying the BXDATA folder (backed up before activation) to the Sage 300 ERP program folder.

Then, use the Bulk Import feature to import new reports from newer versions of Sage 300 ERP Intelligence Reporting or from existing reports. Importing the new reports in this way ensures that your existing reports and settings are not deleted.

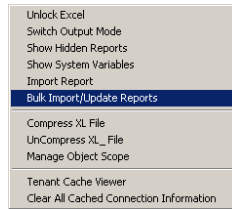
To import new reports:

1. Open Report Manager.



2. Enter the required connection information for your Pervasive PSQL or MS SQL database, and then click OK.
3. In the Object window, do one of the following:
 - Click the **Home** object, and then, from the **Tools** menu, click **Bulk Import/Update Reports**.

- Right-click the **Home** icon, and then click **Import/Update Reports** from the menu that appears.



3. On the Bulk Import/Update Reports form that appears, click **Yes** to import the new reports.

When the new reports are imported, they will co-exist with the backed-up (BXDATA) reports from the previous version.

Configuring the Sage 300 ERP Portal

Before you can use the Sage 300 ERP Portal, you need to create a portal database using Microsoft SQL software. The portal database stores files used by the Sage 300 ERP Portal, including user preferences and passwords, snapshot configurations, and other files that determine how the portal looks and functions.

Note: You must use Microsoft SQL Server (full or Express edition) to create your portal database.

If you are upgrading from Sage ERP Accpac 6.0:

- If you used Pervasive PSQL to create your portal database, you must recreate your portal database in Microsoft SQL Server. To create your portal database, follow the instructions in the *Sage 300 ERP Installation and Administration Guide*.
- If you used Microsoft SQL Server to create your portal database, your database will be upgraded automatically for use with the version 2014 portal, and all existing settings will be preserved.

Normally, you create the portal database on the same server as your Sage 300 ERP data. The portal database is shared by all companies in a Sage 300 ERP installation, so you configure only one Sage 300 ERP Portal.

After creating the database, configure the portal to connect it to the database.

Note: If you use SQL Server Express, you will need to configure a TCP/IP connection manually as described in the section "Configuring a Microsoft SQL Server Express Database."

To configure the portal:

1. From Windows' Start menu, select **All Programs > Sage 300 ERP > Database Setup**.
2. Click the **Portal** button to open the Configure Portal form.
3. Enter the following information on the Configure Portal form:
 - **Database Format (read-only).** The format is set to Microsoft SQL Server because it is the only database engine you can use to create your portal database.
 - **Server Machine.** The default portal server that appears is the name of the machine on which you installed Sage 300 ERP. If you created your portal database on a different machine, enter the name of that machine, instead.
 - **Server Port.** Enter the TCP/IP port number specified in your database software for your portal database. The server port must be the HTTP port for SQL Server. (The default port number is 1433.)
 - **Database Name.** Enter the name specified for the portal database in your database software
 - **User Name and Password.** Enter the user name and password specified for your database administrator in your database software. (They are not the credentials for the Sage 300 ERP ADMIN User.)

Note: For a Microsoft SQL Database, you must supply credentials for SQL authentication. The portal does not support Windows authentication.

4. Click **OK**.

The program saves this configuration to a file named dbConnection.xml, which is located in the following folder under Program Files:

Common Files\Sage\Sage 300 ERP\Tomcat\portal\swtServices.

Configuring a Microsoft SQL Server Express Database

The following instructions apply only to a Microsoft SQL Server Express portal database.

TCP/IP connections are not enabled automatically in SQL Server Express. Because the portal requires a TCP/IP connection, you must set one up manually, as follows:

1. Open the SQL Server Configuration Manager.
2. Under the SQL Server Network Configuration tree, click **Protocols For SQLEXPRESS**.
3. For the TCP/IP protocol, select **Enabled**. (The default setting is Disabled.)
4. Right-click the TCP/IP protocol, click **Properties**, and then select the **IP Addresses** tab.
5. On the TCP/IP Properties screen, in the IPAll Section:
 - a. Clear the TCP Dynamic Ports field.
 - b. Set the TCP Port to 1433.
6. Restart the SQL Server.

Starting the Sage 300 ERP Portal

Once you have activated the company data for version 2014 programs and configured the Sage 300 ERP Portal as described in this notice, users can open the portal from the Windows Start menu by clicking **All Programs > Sage 300 ERP 2014 > Portal**.

For troubleshooting tips, see Chapter 5 in the *Sage 300 ERP Installation and Administration Guide*.

What's New in Sage 300 ERP 2014

For detailed information about changes and new features in this version, see *What's New in Sage 300 ERP 2014*, available on the installation DVD and from the Sage 300 ERP\Docs\62A program folder on the computer where you installed Sage 300 ERP.