



Sage 200 Form Launching Configuration Guide

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Introduction

About this guide

This guide explains how to configure the Sage 200 Task Launcher.

Recommendations

To configure the Sage 200 Task Launcher, we recommend that you are familiar with the following:

- Sage 200 CRM administration and configuration.
- Setting up Internet Explorer.
- HTTP ports.
- Terminal Services or Citrix, if these are being used.

System requirements

You must have the following installed:

- Sage 200 Accounts 2009 – Server.
- Sage 200 Accounts 2009 – Client.
- Sage 200 CRM version 6.2a.
If you are on an earlier version of Sage CRM, please refer to the Upgrade CRM to 6.2 guide for further instructions.
- Microsoft SQL Server 2000/2005
- Microsoft Internet Information Services (IIS) version 6.0 or above

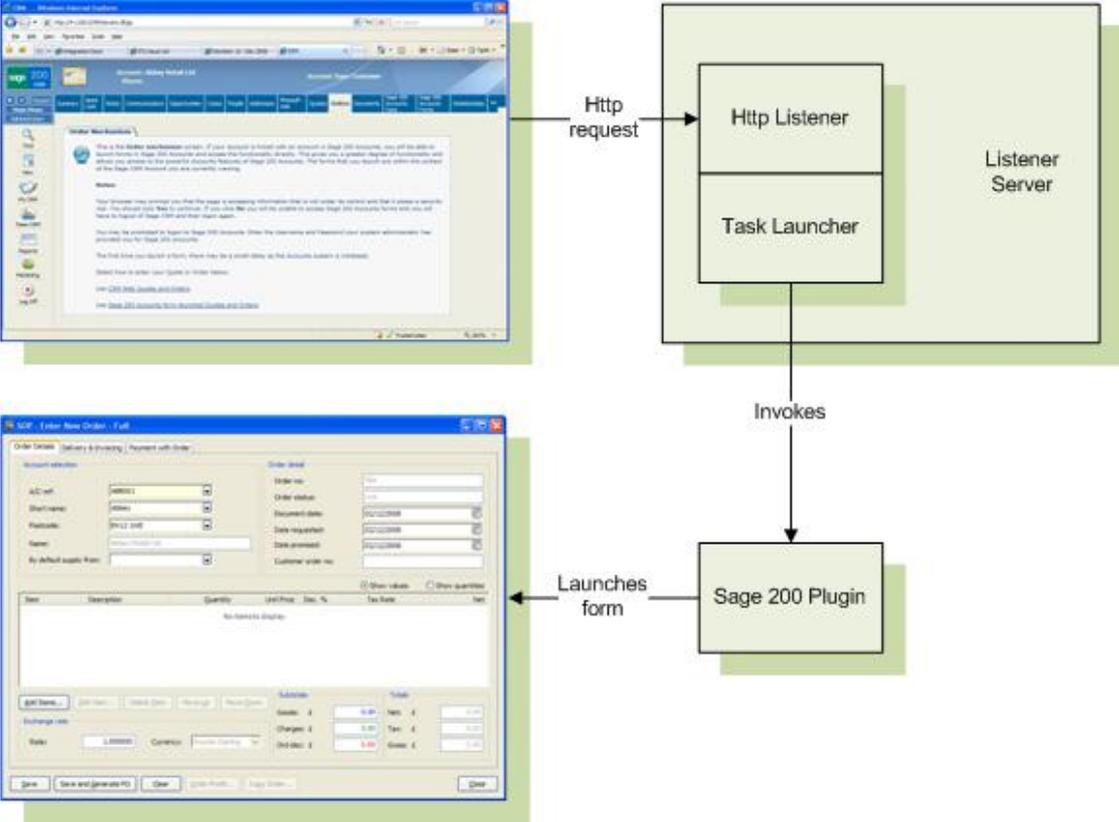
About the Sage 200 Task Launcher

The Sage Task Launcher has two parts:

- Task Launcher Listener
- Sage 200 remote desktop.

The Sage Task Launcher Listener is a web server running in the context of the current user.
Note: The Sage Task Launcher Listener is not a Windows service.

The Task Launcher Listener listens on a defined port. It processes http requests from the local machine (localhost / 127.0.0.1). Requests to the Listener are parsed and passed to the Sage 200 application Plug In. The Sage 200 application Plug In then implements the Task Launcher IPlugIn interface. The Sage 200 application Plug In interprets the request and launches the appropriate Sage 200 Accounts form.



The Task Launcher Listener

The Task Launcher Listener is a windows application. It runs in the system tray and can be accessed via the Programs menu; Sage Task Launcher > Sage Task Launcher Listener.

As there is also a shortcut to the program in the Windows Start Up folder.

To display the Task Launcher Listener menu:

1. Right-click the  icon in the system tray.
2. Choose to:
 - 'Start' the Sage 200 Task Launcher Listener.
 - 'Stop' the Sage 200 Task Launcher Listener.
 - 'Exit' the menu.
 - View information 'about' the Sage 200 Task Launcher Listener.

We recommend that you leave the Task Launcher Listener running permanently on any machine from which you may want to launch Sage 200 Accounts forms.

The Remote Desktop (Sage 200 application Plug In)

The Sage 200 (remote Desktop/ application Plug In) is launched by the Sage Task Launcher Listener when an http request for the Sage 200 application is received.

When the Sage 200 (remote desktop/ application Plug In) is running, the  icon appears in the system tray.

To display the (Sage 200 remote desktop/application Plug In) menu:

1. Right- click icon in the system tray.
2. Choose to:
 - Stop the remote desktop application
 - View information about the remote desktop application.

If the remote desktop application is not running when a http request to launch a Sage 200 Accounts form is received by the Task Launcher Listener, it will start automatically. You must log onto Sage 200 using your Sage 200 username and password. The requested Sage 200 form is displayed.

You can create a remote user record in the Sage 200 Task Launcher. This allows you to open the Sage 200 Accounts forms but not the Sage 200 Accounts desktop and you do not use a Sage 200 Accounts license. Please see the Sage 200 CRM Integration Configuration guide for more information.

Note: You do not have to logon to Sage 200 Accounts again unless you close the remote desktop application.

Installing the Sage 200 Task Launcher

The Sage Task Launcher and the Sage 200 remote desktop application are both installed as part of the Sage 200 client installation.

Further configuration is required if:

- You already have an application using http port 8088.
- You are running in a Terminal Server or Citrix environment.

To change the port then please see the Http Ports section.

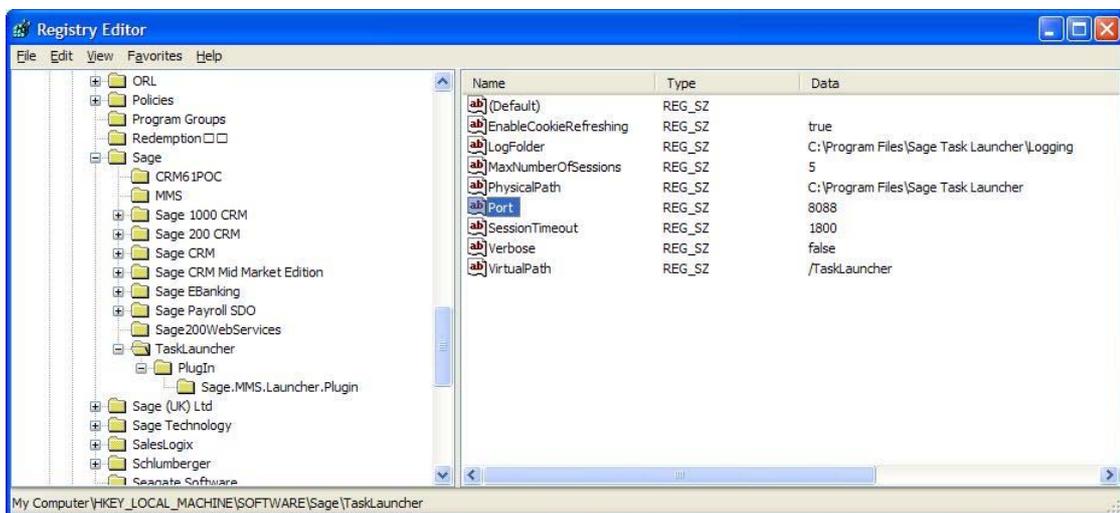
Http Ports

By default, the Task Launcher Listener listens on port 8088. If this port is already in use, then you must change the port in the Task Launcher Listener and in Sage 200 CRM.

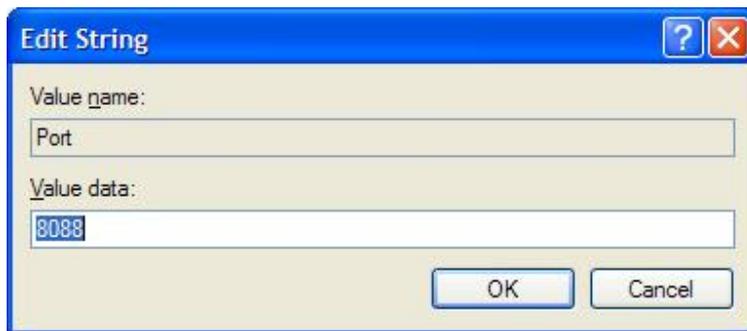
Changing the port in the Sage 200 Task Launcher

To change the port that the in the Sage 200 Task Launcher, you must edit a value in the registry.

1. To open the Registry Editor, choose Start > Run.
2. Enter 'regedit' in the open box.
3. Click OK. The Registry Editor window appears.
4. Select HKEY_LOCAL_MACHINE > SOFTWARE > Sage > TaskLauncher.



5. In the right pane, right-click on Port.
6. Select Modify from the pop-up menu. The Edit String window appears.



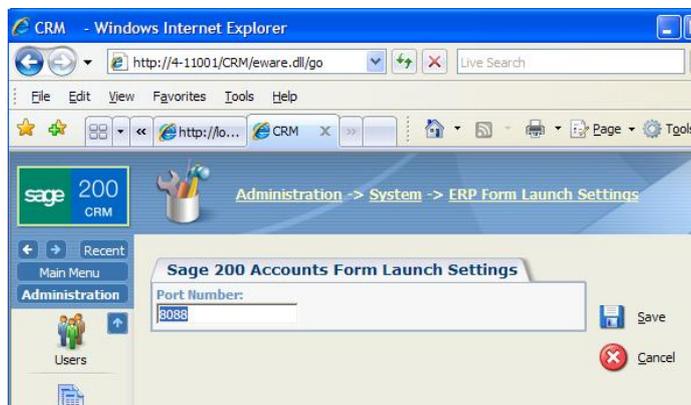
7. Enter the new port value you want to use.
Note: This port must not be blocked by a firewall.
8. Stop the Task Launcher Listener. Right-click on the system tray icon and select Stop Listener from the pop-up menu.
9. To apply your changes, select Start Listener from the pop-up menu.

Next you must change the Sage 200 CRM settings to use the same port number.

Changing the port in Sage 200 CRM

To change the port number used in the Task Launcher URL generated by Sage 200 CRM:

1. Open Sage 200 CRM.
2. Select Administration > System > ERP Form Launch Settings. The Sage 200 Accounts Form Launch Settings page appears.



3. Enter the required Port Number.
Note: The new port must not be blocked by a firewall. The same port number must be set up in the Sage 200 Task Launcher.
4. To confirm the new port number, click Save.

The URL format

The Task Launcher uses the following URL format:

`http://localhost:port/Tasklauncher/PluginName/Target.Action?par1=val1&parX=valY`

Explanation of the URL for a Sage 200 form

The following URL example opens the Full Order Entry form from Sage 200 Accounts:

<http://localhost:8088/TaskLauncher/Sage.MMS.Launcher.Plugin/LaunchForm.Open?companyName=DemoData&formNo=4&customerDbKey=1019>

The following table explains each section of this URL.

URL section identifier	Description
localhost	Shows that this request will be interpreted on this machine only
8088	The port being listened on.
TaskLauncher	The Task Launcher Listener application.
Sage.MMS.Launcher.Plugin	Shows that the Sage 200 plug-in is used for this request.
LaunchForm.Open	Shows you want to launch a form
Parameter 'companyName'	The Sage 200 Accounts company to use for this request. In this example, it is 'DemoData'.
Parameter 'formNo'	The Sage 200 Accounts form to launch. In this example, Form 4 is 'Full Sales Order Entry'. At present a list of available forms for launching is not published.
Parameter 'customerDbKey'	Shows the customer that should appear on the form, when the form is opened. In this example, the customer with the DbKey value '1019' is 'Abbey Retail'.

Using the Task Launcher with Terminal Services and Citrix

The Sage 200 Suite is **not** currently supported in a Terminal Server environment.

If you are using Terminal Services or Citrix, this section provides advice and guidance only.

For further information on how to configure the Sage 200 Suite with Citrix and Terminal Services, see the Sage 200 CRM Citrix Installation Guide.

Preparing Task Launcher for use with Citrix Sessions

When the Sage 200 Task Launcher is installed, it adds a Windows Service into the Services MMC snap-in. This is the 'Dispatcher'.

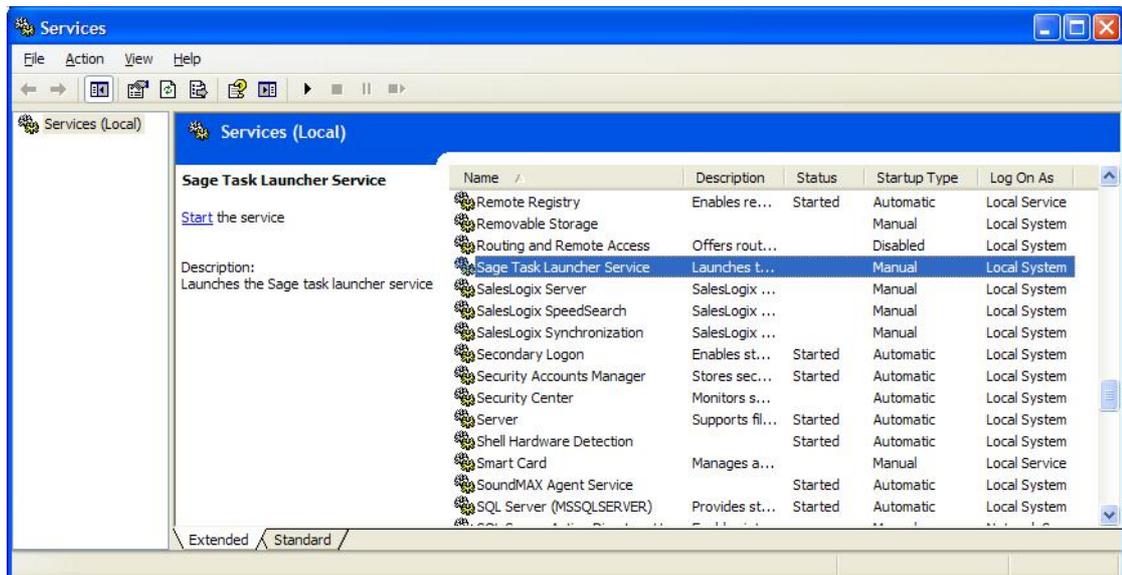
For each Citrix client session, the Sage 200 Task Launcher application must be run in 'Multi-user' mode. When you launch Sage 200 Accounts forms, each multi-user Task Launcher contacts the Dispatcher with the information about the form that is to be launched. The Dispatcher then launches the form on the Citrix server so that it appears within the Citrix client desktop session.

Configuring the Dispatcher on Citrix Server

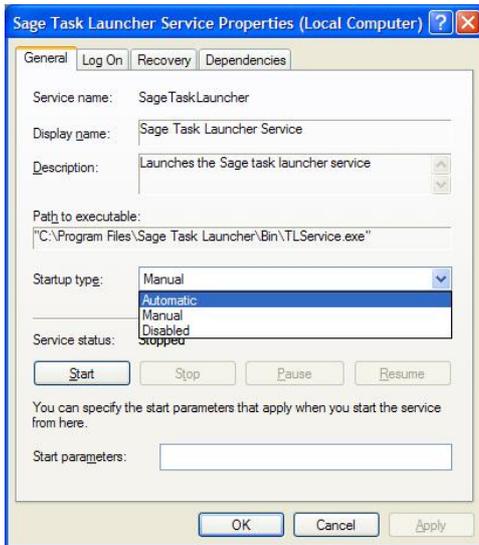
You must configure the Dispatcher for it to function properly. As this is a Windows Service it is configured in the Control Panel > Administrative Tools > Services.

For the Citrix Server environment, the Dispatcher must be set to start automatically. To do this:

1. From the Start menu, select Control Panel > Administrative Tools > Services.



2. Right-click the Sage Task Launcher Service.
3. Select Properties from the pop-up menu.
4. Select Automatic from the Startup type drop-down list.



5. Click Start, to start the service
6. To confirm the changes, click OK

The Dispatcher will now run for the entire machine and all sessions will be able to interact with it. Only one instance of the Dispatcher can be running across the entire machine.

Setting the Task Launcher mode on the Citrix client desktop

You must set the Sage Task Launcher to run in the correct mode on your Citrix client desktop. To do this, you must add a startup parameter to the Sage Task Launcher shortcut.

You can set up the Task Launcher for individuals or for all users.

Setting the Sage Task Launcher for individual users

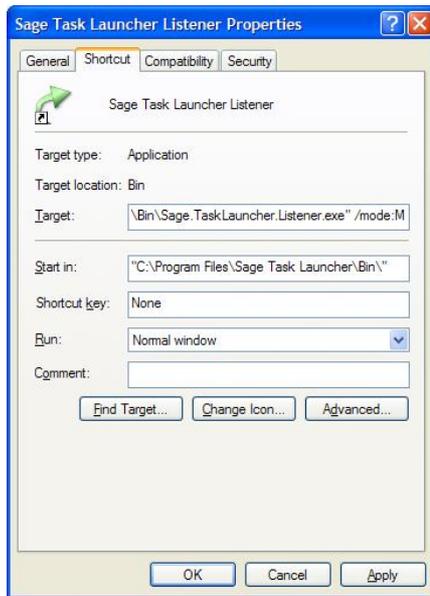
To set the Sage Task Launcher startup mode for individual users:

1. On the User's machine, open the Sage Task Launcher Listener from the Startup folder. Choose C:\Documents and Settings\username\Start Menu\Programs\Startup



2. Right-click the Sage Task Launcher Listener shortcut.
3. Select Properties from the pop-up menu.
4. Add '/mode:M' to the end of the target string.

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5. To confirm the changes, click OK.

Setting the Sage Task Launcher for all users

To set the Sage Task Launcher startup mode for all users:

Follow the instructions above for the following using the Startup folder in the All users group. This makes sure that each user has the Task Launcher running within their Citrix session.

Note: This application typically uses about 20MB of memory.

Troubleshooting

Why are there two icons for Sage 200 Task Launcher in the system tray when not using Citrix?

This is due to a known issue with Windows when refreshing the system tray. It retains an icon, even when the Task Launcher Listener is closed.

To resolve this:

Move the cursor over the system tray to refresh it. Move the cursor over the icon again and it will disappear.

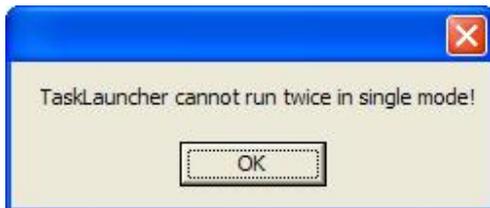
The Listener does not start

Check the port you have chosen is available (default: 8088).

The Task Launcher cannot run twice in single mode

By default, the Task Launcher Service is set to start manually. The Task Launcher is also added to the Startup folder by default, for All Users and is set to run in a single mode.

When two users log into a Citrix or Terminal Services machine, the Task Launcher opens twice and the following message is displayed:



To fix this:

1. Set the service to start automatically. See Configuring the Dispatcher on Citrix Server.
2. Change the shortcut to run for All Users. See Setting the Task Launcher to the correct mode on the Citrix client desktop.

The Task Launcher has not been started

If the Task Launcher has been set to start in the correct mode, but the service has not been started, the following message is displayed.

Please check that the dispatcher is running. Call administrator if error still occurs.

To fix this:

Set the Task Launcher Service to start automatically.

Note: If the Task Launcher Service fails to start upon instruction, please see the Windows Event Log for more information.