sage

200

Web Time & Expenses Guide

Sage (UK) Limited Copyright Statement

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Chapter 1

Introduction

This chapter will guide you through all of the processes required for you to install and configure Sage 200 Web Time & Expenses (Sage 200 WTE).

There is more information on the Sage 200 support area of the Sage website.
For more information see:
see www.sage.co.uk/sage200support

Note: This guide assumes that you are familiar with SQL Server and IIS V6 and above. Although the installation tools will configure most of Sage 200 WTE, it is still necessary for you to set some tasks.

In this chapter:

Sage 200 WTE Setup

The Sage 200 WTE setup requires the installation and configuration of several programs. To make this easier to follow, the process has been broken down into several stages.

Confirm the Prerequisites are installed

There are several programs that have to be installed before you can install Sage 200 WTE. You will need to read *Chapter 2, Getting Started* first.

Create a Sage 200 Accounts user

You must create a user record in Sage 200 Accounts. This is used by Sage Application Integration Services to access data from your Sage 200 Accounts program.

Install Sage 200 WTE Web Application and Services

These are the core web services that are used to retrieve and insert data into your Sage 200 WTE application. This also installs the web application that allows the user to enter their online time sheets and expenses.

Test the Web application

You must test the application and web services to make sure they work correctly.

You must also enter the activation code at this stage.

Install Sage Application Integration Services (AIS)

This application synchronises the Sage 200 WTE system and Sage 200 Accounts data. It allows you to configure when and how the data is transferred between the two programs.

Install Sage 200 WTE Application Adapters

These adapters are used by the Sage Application Integration Services to allow communication between Sage 200 Accounts and the Sage 200 WTE web services.

Run the WTE synchronisation for the first time

This process synchronises Sage 200 Accounts and Sage 200 WTE. It makes sure the data in Sage 200 WTE is imported from your Sage 200 Accounts program.

Run WTE for the first time

The user names for WTE are created when the remote entry users are synchronised. If necessary you can change these user names.

Once you have completed these steps, you can start entering information into the WTE application

Chapter 2

Getting Started

Before you install Sage 200 WTE, read this chapter. It will help you to understand the requirements needed to effectively install Sage 200 WTE.

In this chapter:

Prerequisites for Installing Sage 200 WTE

The Sage 200 WTE application requires several other components to be installed before you can use it. The following prerequisites and components are required for each installation:

Prerequisites

- ✔ Microsoft .NET 3.5 Framework Redistributable Package.
  This is required by the Sage WTE application.
  Note: This is available on the Sage 200 suite DVD.

- ✔ Internet Information Services v6 or above.
  This additional Windows component must be installed on the web server prior to installation of the Sage 200 WTE web application and services.

Installed Components

- Microsoft XML Parser V4.
  (Required by Sage AIS.)
- Microsoft XML Parser V6.
  (Required by Microsoft SQL Server Client Tools.)

Internet Information Services (IIS)

You must have Internet Information Services version 6 or above installed on the web server where you want to host your the Sage 200 WTE web application. If IIS v6 is not installed, you can find it on your Microsoft Windows CD.

To check your installation of IIS

1. From the Start menu, select Control Panel.
2. Select Add or Remove Programs.
3. Select Add / Remove Windows Components.
4. Select Application Server from the list of components.
5. Click Details and ensure that IIS is selected in the list.

Creating a Sage 200 WTE user record in Sage 200 Accounts

To allow the exchange of data between Sage 200 Accounts and Sage 200 WTE, you need to have a user record configured within Sage 200 System Administration. You must add this record as a resource in Sage 200 Project Accounting.

You must have a Sage 200 user record per Sage 200 WTE company.

To create a Sage 200 user record.

1. Log onto Sage 200 System Administration.
2. From the Navigation bar, choose Users.
3. Select Actions > Add New User.
4. Enter the Logon Name.

   We recommended that this is 'AIS <company name>'.

   Note: If you have more than one company in Sage 200 WTE, you must create a different AIS logon name for each company. For more information see *Adding a New Company* on page 74.
5. In the Added User Properites, select the Company Access tab.
6. Select the Sage 200 Accounts company, that you want to integrate with Sage 200 WTE.
7. Click OK to save the new user record.

Now you must create a role for your AIS user record.

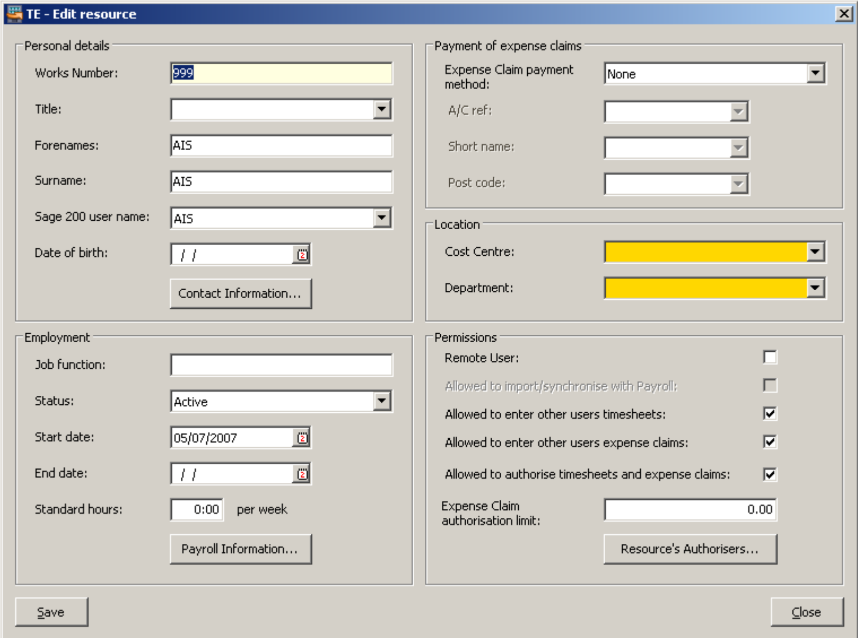
8. From the Navigation bar, choose Roles.
9. Select Actions > Add New Role.
10. Enter the Role name and click OK.
    The Role Properties window is displayed.
11. Select 'Remote Users Access Only'.
12. Select the Users tab. Move the AIS user record to the Selected Users pane.
13. Click OK to save this role.

You must also create a Resource record for the user in Sage 200 Project Accounting for the company that you want to integrate with Sage 200 WTE.

1. Open the Sage 200 Accounts company.
2. Choose Project Accounting > Project Maintenance > Resources.

   The Resource window appears.
3. Add a new resource.

The name of this resource can be set as desired, but this resource must be associated with the user created within Sage 200 System Administraton.



4. Select the AIS user from the Sage 200 user name drop-down list.
5. Select the following check boxes to allow the newly created user to perform the necessary functions within the AIS synchronisation process.
   - Allowed to enter other users timesheets.
   - Allowed to enter other users expense claims.
   - Allowed to authorise timesheets and expense claims.
6. Click Save.

   The new resource is available to you when you configure AIS.

Notes on installing Windows 2003 server

There is a known issue with some installation applications when they are installed on Windows 2003 Server. When the installer is run, you may see the following message.

If this message is displayed when any of the Sage 200 WTE install applications are running, click 'OK' to continue.

There may be a delay before this window is closed. This is normal and may take several minutes. The delay is due to the application installer checking and installing any prerequisites that may be required.

Information you need to install and configure Sage 200 WTE

The following information is required for the installation of Sage WTE.

To save time, it is recommended that you have the information to hand before beginning the installation.

- The IP Address or URL of the web server.
- The IP Address, machine name and/or instance name of the database server.
- The system administrator password for your SQL Server.

  This must not be a blank password.
- The activation code for your Sage 200 WTE web application.

Retrieving your Activation Code

The installation CD contains a file called MACAddr.exe. This file returns the MAC address used by your web server and the value is used to create your activation code. When you contact our Customer Support department to get your activation code, please have the MAC address of the web server on which you intend to host Sage 200 WTE and the Sage 200 WTE company name.

Multiple Network Cards

If you have multiple network cards on the web server where you intend to host Sage 200 WTE, you will need to note the MAC Address for each network card. These additional MAC Addresses will need to be entered in the SQL tables for your SAGE 200 WTE database.

You will need to enter the additional MAC Addresses in the SYSTEMPARAMS table in the MacAddress2 and MacAddress3 fields for each company database holding Sage 200 WTE data.

Checklist

Before installing the Sage 200 WTE application, make sure you have the following:

- ❑ Web Server IP Address/URL.
- ❑ Database Server IP Address/Machine Name.
- ❑ SQL Server System Administrator logon and password.
- ❑ Sage 200 WTE Web Application Activation Code per Sage 200 WTE company.
- ❑ Microsoft .NET Framework v3.5 installed on web server.
- ❑ Microsoft .NET Framework v3.5 installed on application server.
- ❑ IIS v6 or above installed and running on the web server.
- ❑ An AIS user record in the Sage 200 System Administraton application.
- ❑ A resource associated with the AIS user record within Sage 200 Project Accounting.
- ❑ Set the resource to allow entry of others timesheets and expenses within Sage 200 Project Accounting.
- ❑ Set the resource to allow authorisation of timesheets within Sage 200 Project Accounting.
- ❑ Set the resource as an authoriser for all remote users within Sage 200 Project Accounting.

Chapter 3

Installing Sage 200 WTE Web Application and Services

This chapter will guide you through the installation and configuration of the Sage 200 WTE web application.

Once this process is complete, you will be able to install and configure the integration services and adapters on the application server.

In this chapter:

Installing Sage 200 WTE

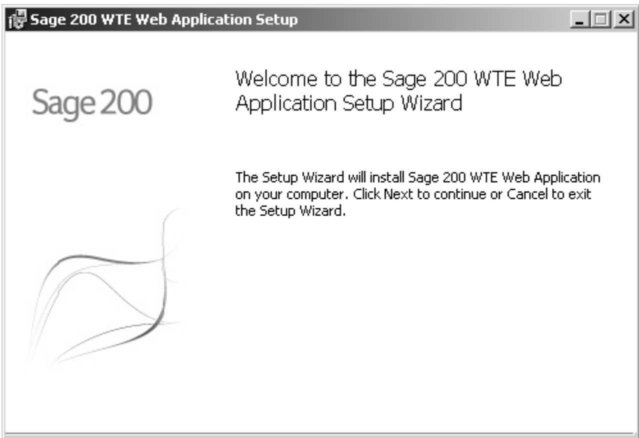
The Sage 200 WTE installation should be performed on the Web Server machine.

Note: If you are running Windows Firewall on your Windows server, you may be presented with a security message within Internet Explorer. This message states that the 'Microsoft Internet Explorer's Enhanced Security Configuration is currently enabled'. You must add WTE as a 'trusted site' to be able to use it without it being blocked by Internet Explorer's security settings. For more information, see *Windows Server Security Features* on page 30.

To Install Sage 200 WTE

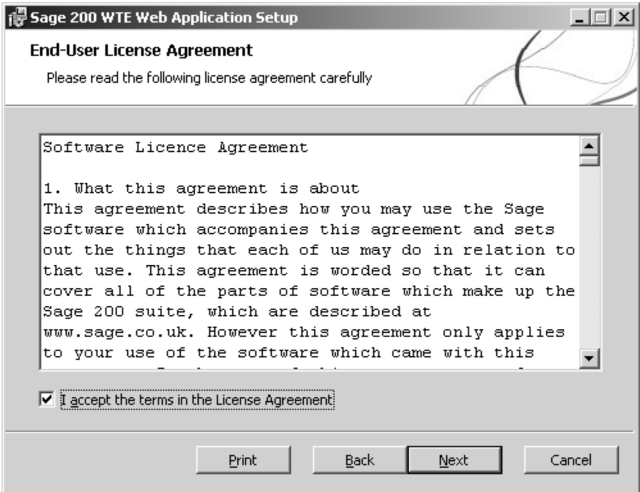
1. Run the Sage 200 WTE installation routine from the Sage 200 suite DVD.

   The 'Welcome to the Sage 200 WTE Web Application Setup wizard' window appears.

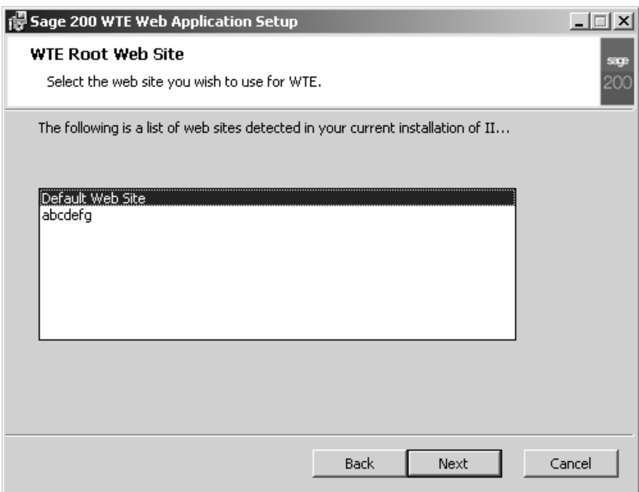


2. Click Next.

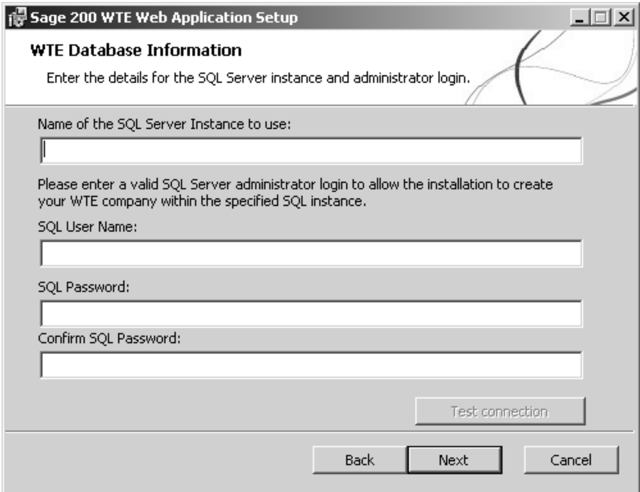
   The Licence Agreement window is displayed.



3. Ensure that you have read carefully and understood this licence agreement before selecting the 'I accept the terms in the license agreement' option.
4. Click Next to confirm the acceptance of this agreement.
   The WTE Root Web Site window is displayed.



5. Select the web site that you want to host the Sage 200 WTE web application
   The WTE Database Information window is displayed.



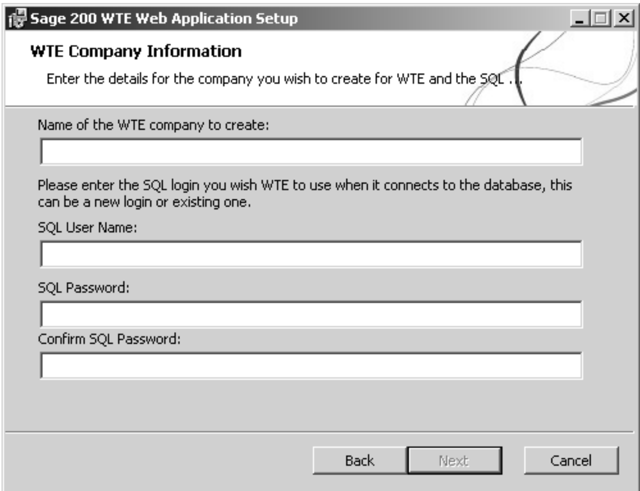
6. Enter the following information:

Name of the SQL Server Instance to use	This specifies the machine on which the instance of SQL Server resides. This box must contain an IP Address or the name of the SQL instance for the Sage 200 WTE application. If you are using 'named instances' on SQL Server 2005, the instance name must be in the format: NET01\NAME. In this example, NET01 is the 'instance' on the server and NAME is the 'named instance' on the server.
SQL User Name	To allow the Sage 200 WTE installer to configure your new database and user details, you must supply logon details. You must enter an SQL Server logon account that has administrator access to the SQL Server instance that you are using. This should be at least 6 characters long. Normally this would be the system administrator account (sa), but you can use another account with similar access rights if you prefer.

SQL Password	Enter the password of the SQL usrname supplied above. This must not be a blank password.
Confirm SQL Password	Confirm the password by entering it again.

Note: The Sage 200 WTE application does not support Windows user authentication with SQL Server.

7. Click Test Connection to check the information entered is correct.
8. Click Next.
   The WTE Company Information window is displayed.



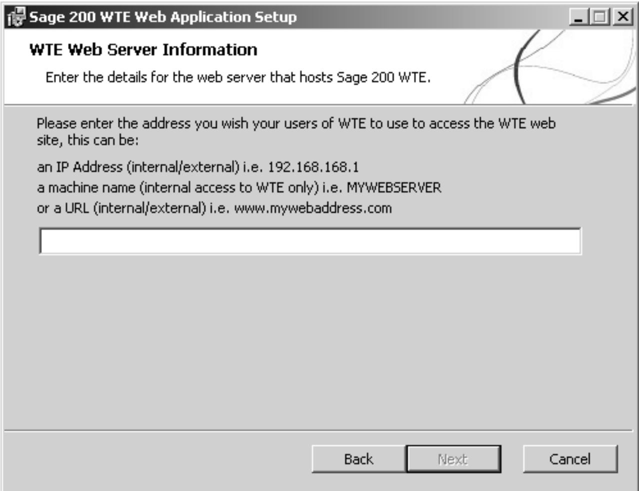
9. Enter the following information

Name of the WTE company to create	Enter the name of the Sage 200 WTE company that you want to create. This name must not contain any spaces. This name is used to create the database within your SQL Server installation as well as the application references.

SQL User Name	This is the username that will be used by Sage 200 WTE to access the database. The installation creates this logon account within SQL Server if it does not already exist. This must be at least six characters long. We recommend that you allow the installer to create a new user for your Sage 200 WTE application. The installer will automatically allow the new user record to read and write to the company database. You can also use this new user record when creating new companies for the Sage 200 WTE installation or a new user for a company.
SQL Password	This is the SQL Server password that will be used in conjunction with the user name specified above. This password must be at least six characters long. This password cannot be blank and should be made as secure as possible. We recommend that your password contains both alpha and numeric characters.
Confirm SQL Password	Confirm the password by entering it again.

10. Click Next.

    The WTE Web Server Information window is displayed.



11. Enter the IP Address or URL or machine name where Sage 200 WTE is hosted.

    If you specify an IP Address, this must be the IP Address of the web server as this is used by the Sage 200 WTE application to link to the relative web pages it uses.

    If you are using a URL you must make sure that you only enter the name of the main website. For example, if Sage 200 WTE is hosted at Sage.co.uk/WTE, you would enter Sage.co.uk in the box.

12. Click Next.

    The Ready to Install window is displayed.

13. Click Next.

    The Sage 200 WTE application is installed on your web server. Once the installation procedure is complete, Sage 200 WTE is ready to be configured.

Note:The Sage 200 WTE installation applies access rights to the WTE folders based on the current machine name. If the machine name has changed since the operating system was installed, you must configure the Directory Security for the 'IWAM' and 'IUSR' logon names for the new machine name. For more information, please see *Troubleshooting the Sage 200 WTE Configuration* on page 80.

Checklist

Before continuing you must have:

- [ ] Installed Sage 200 WTE web application on your web server.

Chapter 4

Testing Sage 200 WTE

Once you have installed Sage 200 WTE, you are ready to test the application and web services to ensure they function correctly.

You test the web services from within Internet Information Services (IIS).

In this chapter:

Testing the Sage 200 WTE Company Web Services

To ensure that Sage 200 WTE web services have been configured correctly, you should run a test.

To test the first Sage 200 WTE Company Web Services

1. Open IIS.

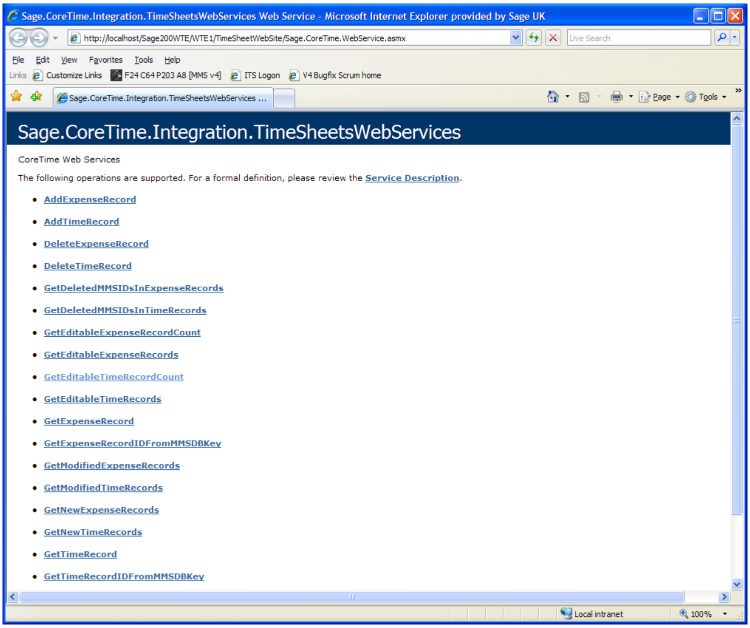
   The Internet Information Services (IIS) Manager window appears.

2. Expand the tree view to see the contents of the Sage200WTE folder. Double click the company folder.

3. Double click the TimeSheetWebSite folder.

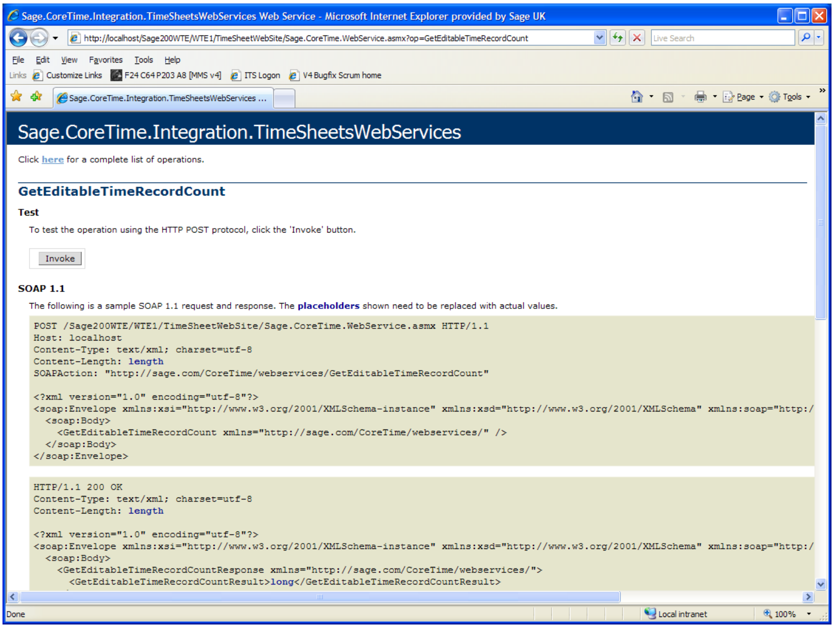
4. Right-click on the 'Sage.CoreTime.WebService.asmx' file, and then select Browse.

   The 'Sage.CoreTime.Integration.TimeSheetsWebServices' window appears.



5. Select 'GetEditableTimeRecordCount'.

   The 'GetEditabletimeRecordCount' window appears.

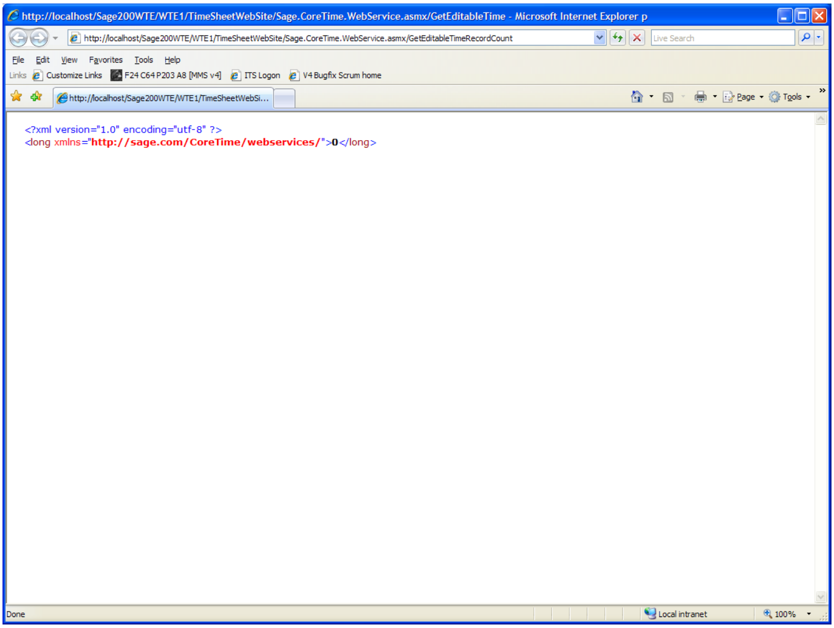


This window details the information for the web service method you have selected.

Note: This facility is only available to a browser on the local machine and not to any other browsers, whether they are based on the local Intranet or on the internet.

6. Click Invoke to test the web method.

   The following window is displayed in your default web browser.



You must now test the second Sage 200 WTE web service.

To test the second Sage 200 WTE web service

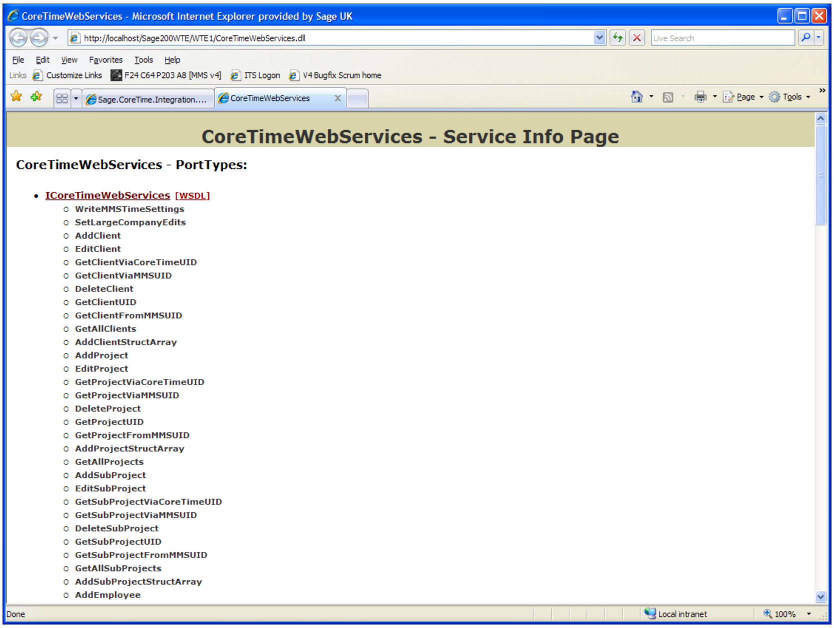
1. Open IIS.

   The Internet Information Services (IIS) Manager window appears.

2. Expand the tree view to see the contents of the Sage200WTE folder. Double click the company folder.

3. Right click 'CoreTimeWebServices.dll', and select Browse.

   The 'CoreTimeWebServices - Service Info Page' window is displayed.



4. Close the Browser and close your IIS program.

Testing and Activating the Sage 200 WTE Web Application

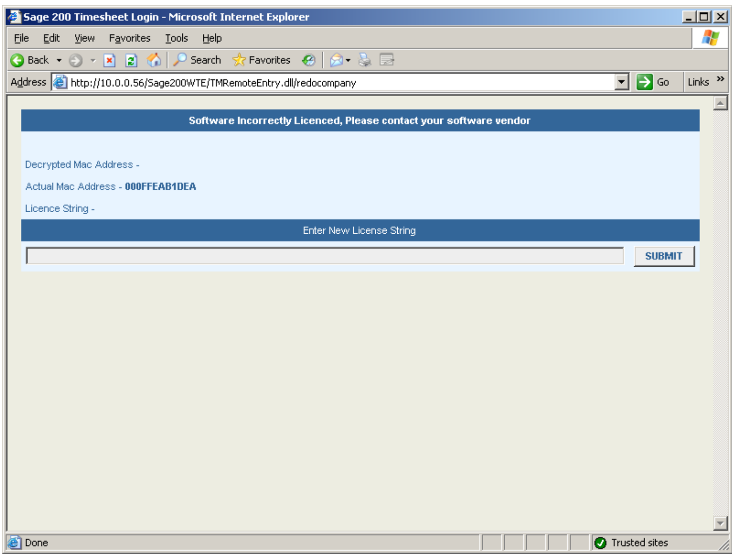
You cannot test the Sage 200 WTE web application from IIS. This must be done through your web browser.

To activate the Sage 200 WTE web application

1. Open your web browser.
2. Depending on the setup of your web application, enter:
   - 'http://<WebServerIPAddress>/Sage200WTE'
   - 'http://<*full website name*>/Sage200WTE' (For example, www.sage.co.uk/Sage200WTE)

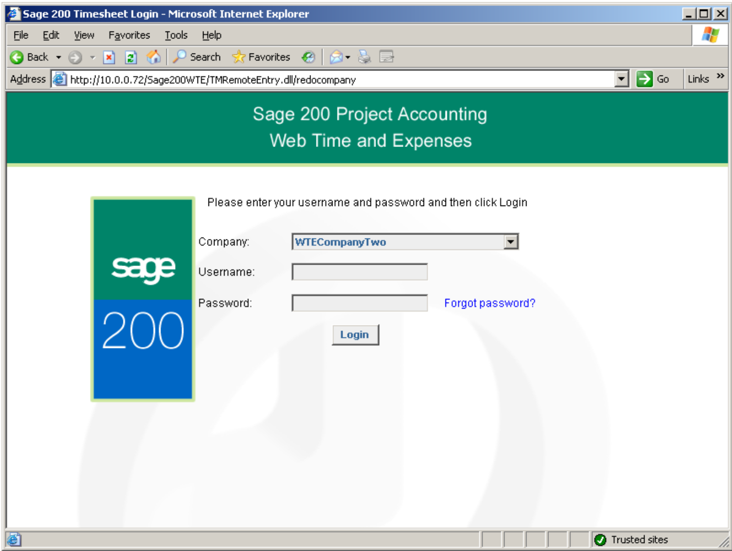
   Note: The <WebServerIPAddress> is the same as the IP Address you entered in the web server 'IP Address' of the Sage 200 WTE installer.

   The Activation window appears.



3. Enter your licence string and click SUBMIT.

   The Sage 200 Timesheet Login window appears.

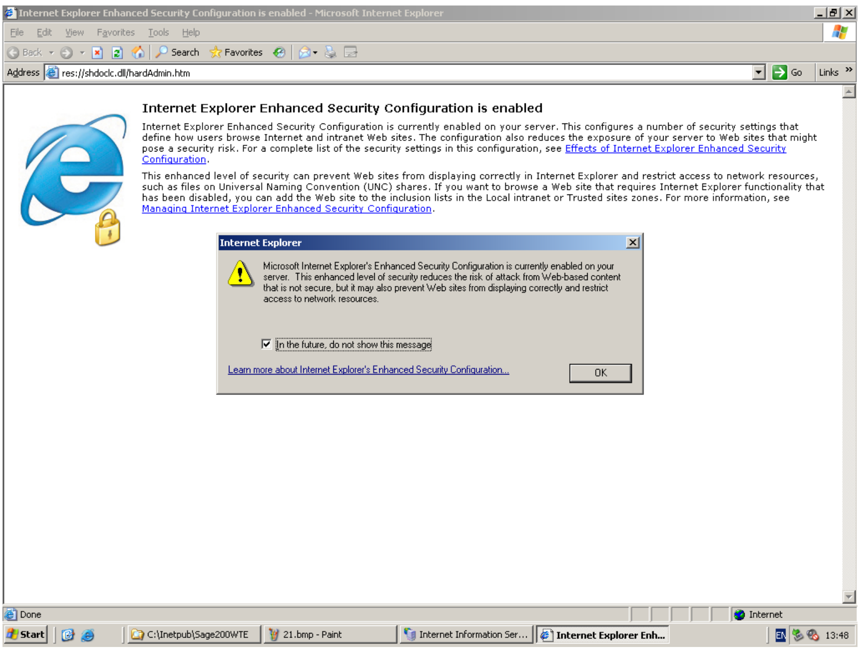


The default installation of Sage 200 WTE has no user records set up in the database. To log on to the Sage 200 WTE application you must synchronise it with Sage 200 Accounts via Sage Application Integration Services (AIS).
See *Preparing and Running Sage 200 WTE for the First Time on page 47.*

Windows Server Security Features

When testing Sage 200 WTE on Windows Server, you may be presented with some warning and configuration windows depending on the way that Internet security has been configured on your server.

When you first attempt to navigate to the Sage 200 WTE web site, you may be presented with the following message within Internet Explorer. This states that the 'Microsoft Internet Explorer's Enhanced Security Configuration is currently enabled'.



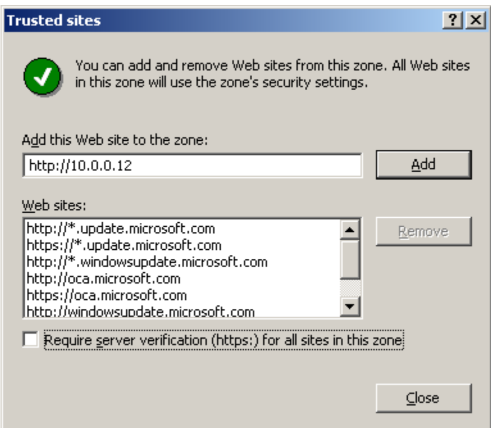
Follow the next procedure to allow access to your Sage 200 WTE web site.

To allow Internet Explorer to access the Sage 200 WTE web site

1. Click OK to the Internet Explorer message.

   The Internet Explorer window is displayed.

2. Click Add.
3. The Trusted sites window is displayed.



Note: Select the 'Require server verification (https:) for all sites in this zone' check box if you are using https.

4. Click Add.

   The Sage 200 WTE web application is now added as a trusted site to Internet Explorer. When this window is closed, Internet Explorer displays the standard Sage 200 WTE logon window, shown previously.

Checklist

Before continuing you must have:

- ❑ Tested the web services.
- ❑ Tested the Sage 200 WTE application.
- ❑ Registered your Sage 200 WTE web application with your activation key.

Chapter 5

Sage Application Integration Services

Sage Application Integration Services (AIS) allows the transfer of data between different data stores, whether these stores are an RDBMS system, like Microsoft SQL Server, or flat file data storage system.

To allow synchronisation between Sage 200 and Sage 200 WTE, you must install Sage Application Integration Services.

In this chapter:

Installing Sage Application Integration Services (AIS)

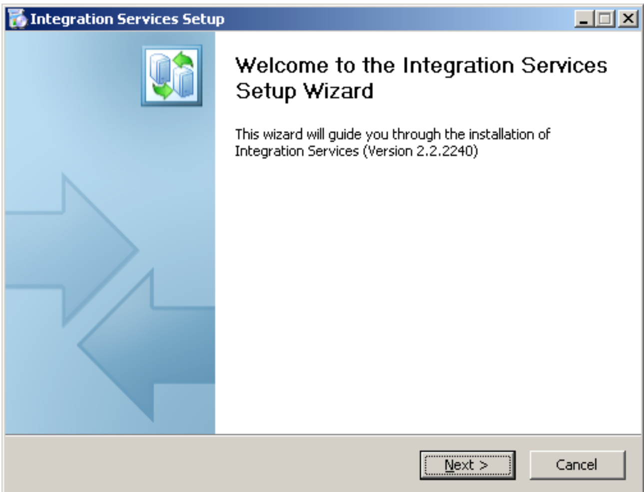
Note: Sage Application Integration Services (AIS) may already be installed on your application server if you are using other Sage applications, such as Sage CRM.

If this is the case, you must upgrade the current installation of Sage Application Integration Services to version 2.2.2 before proceeding with the Sage 200 WTE application adapter installation.

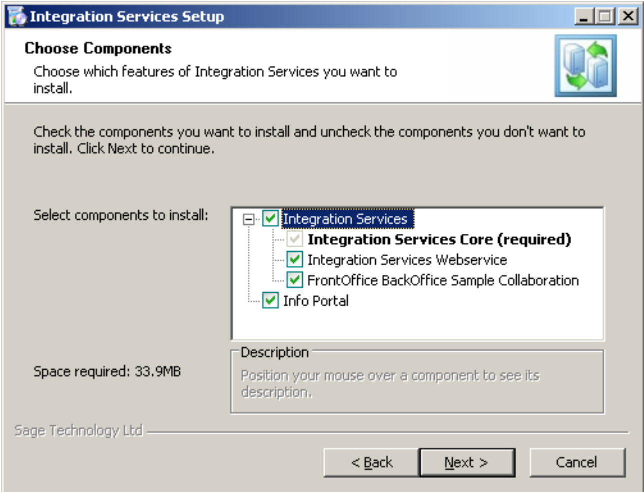
To install the application integration services

1. Run the Sage Application Integration Services installation program on your application server. This is on your Sage 200 suite DVD.

   The Welcome to the Integration Services Setup Wizard window appears.



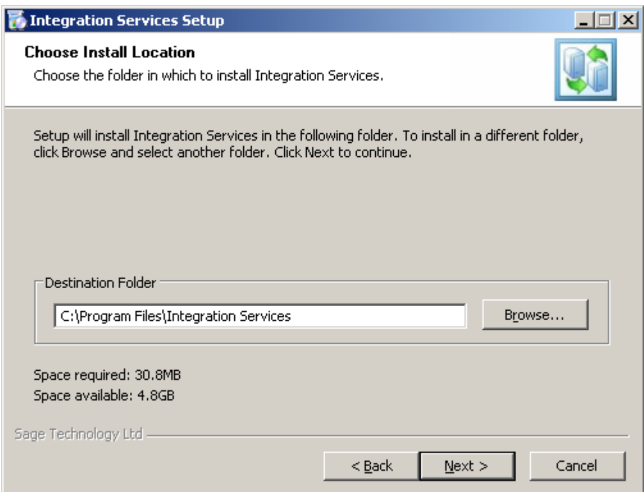
2. Click Next.



3. Select the componenets of the Sage Application Integration Services you want to install and click Next.

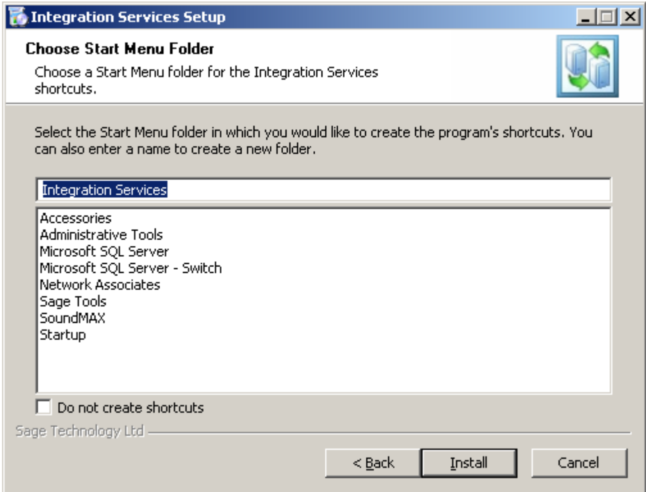
   Note: The only item within this list that is not a requirement for Sage 200 WTE is the FrontOffice BackOffice Sample Collaboration. This is a sample collaboration supplied with Sage Application Integration Services that allows you to experiment with different synchronisation techniques, and as such is not a requirement.

   The Choose Install Location window is displayed.



4. Click Next.

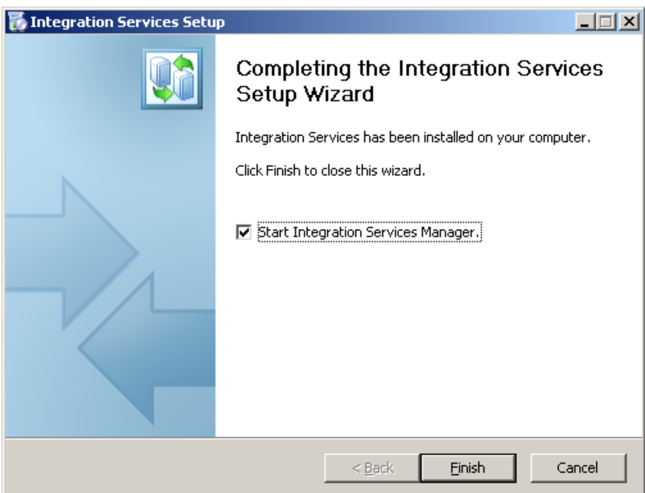
   The Choose Start Menu Folder window is displayed.



Note: Although the path for the installation can be changed, we recommend that you keep the default location.

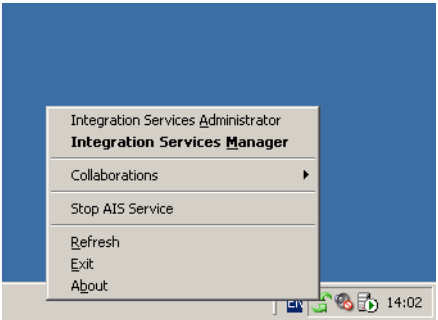
5. Select Install.

   The AIS application installs. Once the installation is complete, the 'Completing the Integration Services Setup Wizard' window is displayed.



6. Select the 'Start Integration Services Manager' check box to start the Sage Application Integration Services and click Finish.

   A new icon appears in your system tray.



Installing the Sage 200 WTE Application Adapters

The applications adapters are required by Sage Application Integration Services (AIS) to connect and synchronise with both the Sage 200 Accounts and Sage 200 WTE data stores. Once this installation is complete, you must manually configure certain processes. Upon completion, you will be ready to enter your timesheets and expenses remotely.

To install Sage 200 WTE Adapters

1. Run the Sage 200 WTE Application Adapter installation program on your application server. This is on your Sage 200 Suite DVD.

   The Welcome window appears.

2. Click Next.
   The Licence Agreement window is displayed.

3. Ensure that you have read and understood the licence agreement before accepting it.

4. Click Next.

   The User Registration information window is displayed.

5. Change the information or leave the default information displayed and click Next.

   The wizard installation window is displayed.

6. Click Install.

   The application adapters have been installed.

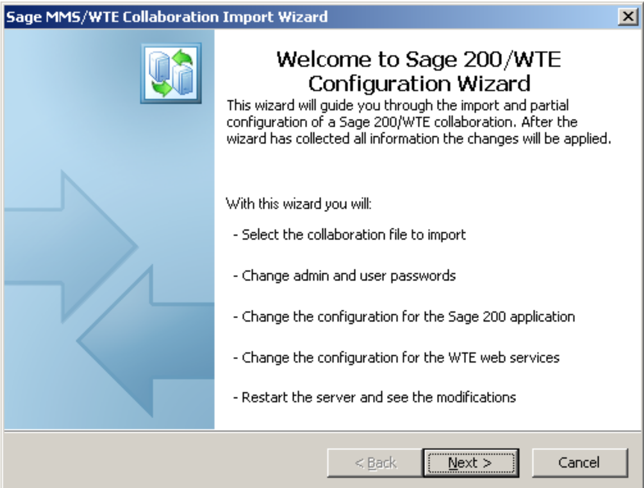
Configuring AIS

Once the installation of the Sage 200 WTE Application Adapters is complete, the installation wizard launches the AIS configuration wizard. This wizard guides you through the process of creating a collaboration for use with Sage Application Integration Services.

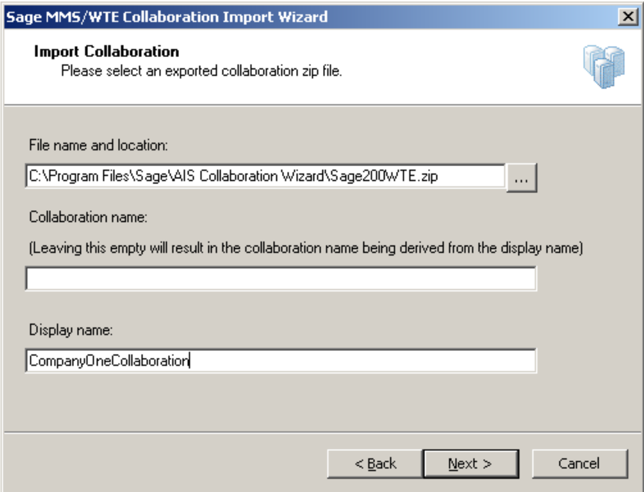
Note: A collaboration is the name given to the entire process and set up of a synchronisation between two different data systems within Sage Application Integration Services.

To configure AIS

Upon completion of the Sage 200 WTE Application Adapters installation, the Sage 200/WTE Collaboration Import Wizard is launched.



1. Click Next to start the wizard.



2. Click '...' to open the browse file window.

   A browse file window is launched.

3. Find the file Sage200WTE.zip and click Open.

4. Enter the Display name you want to use for the collaboration.

   Note: We recommended that you use the name of the company the collaboration is to be used for, followed by the word 'collaboration'. You can then identify it easily when using the Sage Application Integration Services application.

5. Click Next.

6. The Password Protection window is displayed.

7. Enter a Password.

   This restricts access to certain features available within Sage Application Integration Services.

   Note: There are two levels of access. The Administrator password gives full access to all the features available within the Sage Application Integration Services application. The User password only provides access to start schedules and processes made available by the collaboration.

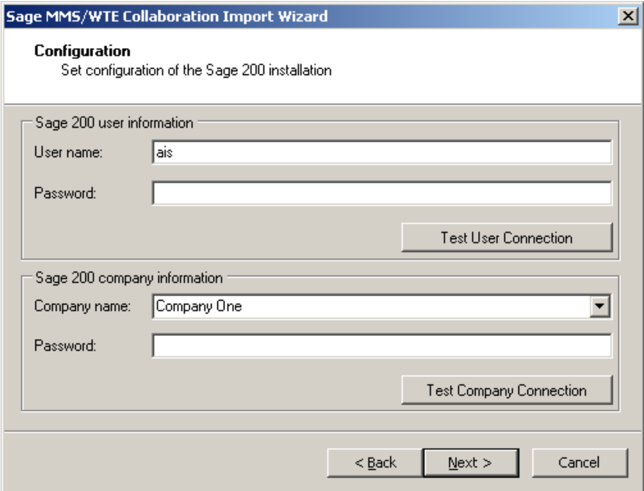
   Depending on your security model, you may choose to set either, both, or neither of these passwords.

   We recommend that you leave the Old password blank.

   You can also set a password for Administrator rights so that only certain users can change the collaborations and processes that you set up. This must be done in AIS.

8. Click Next to set the configuration with the Sage 200 installation

   The Configuration window is displayed.



Setting up the Sage 200 user record and company information

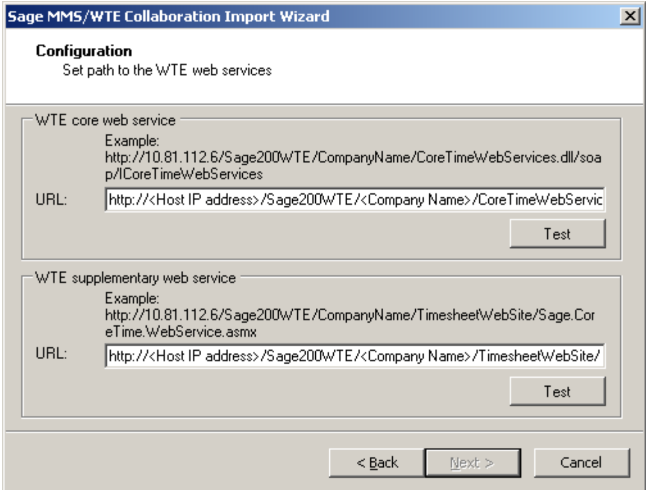
You must now set up the Sage 200 user record and company information that Sage Application Integration Services will use when it performs synchronisation between Sage 200 Accounts and Sage 200 WTE. You should have already created a new user record within Sage 200 Accounts. It was recommended that you called the user 'AIS<company name>'. For more information see *Creating a Sage 200 WTE user record in Sage 200 Accounts* on page 9.

To set up a user record and company

1. Enter the AIS user name you created for this company.
2. Enter the password, if applicabale.
3. Click Test User Connection to verify if the connection is successful.

   The Test Connection Succeeded message appears.
4. Click OK to the Test Connections Succeeded message.
5. Select the Sage 200 Accounts company database from the drop-down list.
6. Click Test Company Connection to verify if the connection is successful.

   The Test Connection Succeeded message appears.
7. Select OK to the Test Connections Succeeded message.
8. Click Next to set the path to the WTE Web Services.



9. Specify the web service URLs that were created when the Sage 200 WTE web application and services were installed.

   Note: These URLs, are already partially populated. If you chose to perform a standard installation, then you need only amend the following parts of the URL.

   - <Host IP Address>

     The IP Address, URL, or Machine name of the web server.

   - <Company Name>

     The WTE company name, excluding any spaces, for which you are configuring this instance.

10. Click Test for each URL to confirm they are valid.

11. Click Next.

    The 'Completing the Sage 200/WTE Configuration Wizard' window is displayed.

12. Select the 'Restart Integration Services' check box and click Finish.

    The new collaboration is installed and configured. By selecting the 'Restart Integration Services' check box, the Sage Application Integration Services application is restarted once the installation is complete. This allows you to start using the new collaboration immediately.

Checklist

Before continuing, make sure you have:

- ❑ Installed AIS on application server.
- ❑ Installed AIS adapters on the application server.
- ❑ Run through collaboration configuration wizard.

Chapter 6

Preparing and Running Sage 200 WTE for the First Time

Before using Sage 200 WTE for the first time, you must synchronise and configure Sage 200 Accounts.

This ensures the data in Sage 200 Accounts and in Sage 200 WTE are in an equal state.

In this chapter:

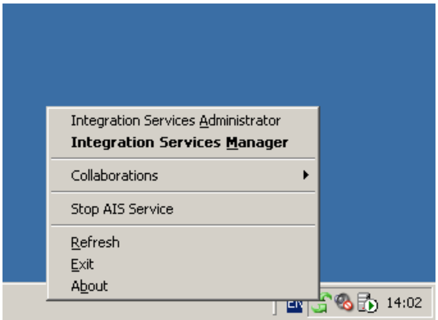
Prepare and Run the Initial Synchronisation

Once you have set up the link between Sage 200 WTE and Sage 200 Accounts, you can set up how the data will be passed between the two programs.

To prepare for the initial synchronisation

1. Right click the Sage Application Integration Services icon on the Windows system tray, located on the your desktop's taskbar.

   A menu appears.



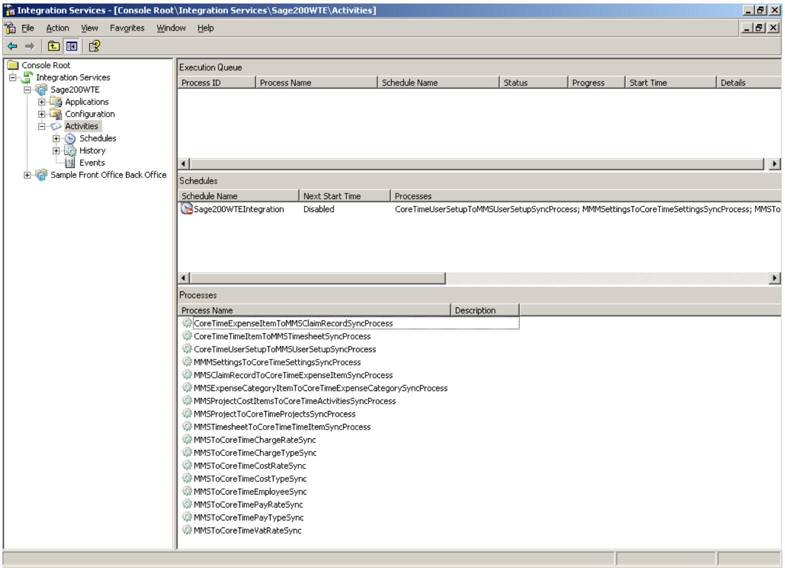
2. Select Integration Services Administrator.

   The Integration Services window is displayed.

3. Select Integration Services in the left pane, followed by the company that you want to synchronise for the first time.

4. Click Activities.

   The right pane displays the information that is used by Sage 200 WTE application.



Execution Queue

The Execution Queue displays any processes that are being executed or are scheduled to be executed at this current time. It also displays information about the processes, and where within their synchronisation cycle they are.

Schedules

The Schedules portion of the screen shows any schedules that may have been created to automate your synchronisation. By default there will be only one schedule here. This is created when the collaboration is configured on your application server and is disabled by default.

Processes

This part of the window displays a list of all available processes. All schedules are broken down into smaller blocks of functionality. These are called processes.

5. From the schedules pane, right-click the schedule and then select Execute.
6. Right-click Activities in the left pane and select Refresh from the pop-up menu.

   The execution queue will now be updated with a list of processes. These are run as part of the schedule. As each process runs, the window updates to display it’s progress. Once the schedule is complete, continue to configure your users within Sage 200 Accounts.

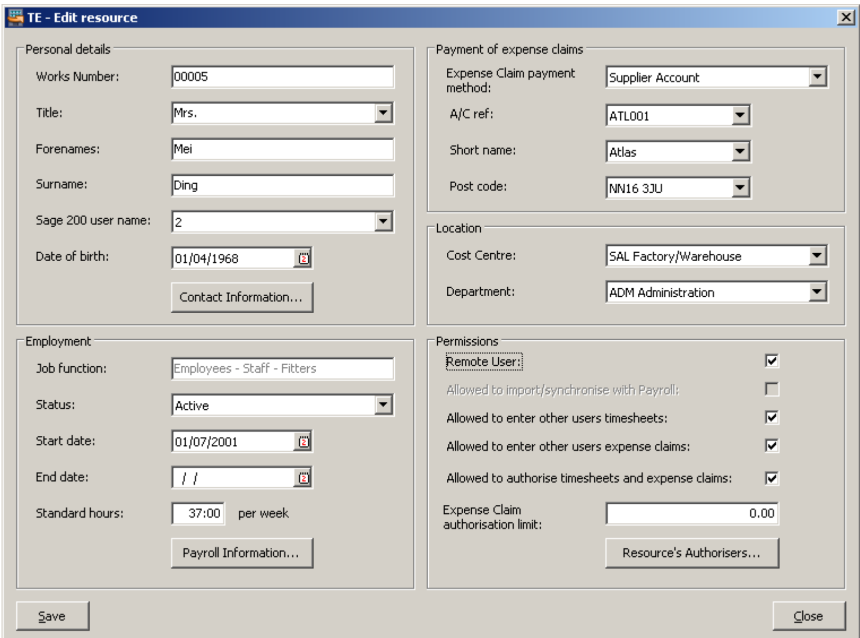
Set up Remote Entry User Accounts

This allows you to set your resources in Sage 200 Project Accounting to use Sage 200 WTE.

To set up Remote Entry Users

1. Open your Sage 200 Accounts program.
2. Select the company that you are currently configuring for Sage 200 WTE.
3. Choose Project Accounting > Project Maintenance > Resources.
4. Select the resources that you want to make remote entry users.
5. Click Edit.

   The TE - Edit resource window appears.



6. Select the Remote User check box for the resource you have selected and click Save.

   This allows each resource to access Sage 200 WTE.
7. Repeat the selection for each resource you require.
8. Close Sage 200 Accounts and return to the Sage Application Integration Services Administrator.

You must now synchronise these remote users with Sage 200 WTE.

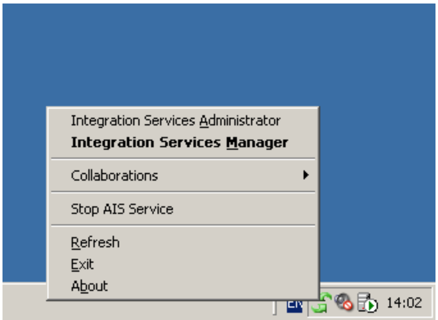
Synchronising the Remote Entry Users

Before you can use your Sage 200 WTE system, you must synchronise with Sage 200 WTE. This adds your remote entry user records to Sage 200 WTE. Logon usernames are also created.

To synchronise the remote users

1. Right click on the Sage Application Integration Services icon on your desktop's taskbar.

   A menu appears.

2. Select Integration Services Administrator.

   The Integration Services window is displayed.

3. Select Integration Services in the left pane, followed by the company that you want to synchronise.
4. Click Activities.

   The right pane displays three areas that relate to the collaboration that is used for the Sage 200 WTE application.

5. Right click the schedule listed in the Schedules area and select Execute from the pop-up menu.

The execution queue will now list processes that are run as part of that schedule. As each process runs, the window updates to display progress. Once the schedule has completed, your Sage 200 WTE system is ready to be used.

Setting up Sage 200 WTE

When the synchronisation process is complete, all the Sage 200 user accounts that were marked as remote entry users, will have been imported into the Sage 200 WTE application. By default, each user account will have been assigned a user name.These user names are generated to give each user a unique user name as required by Sage 200 WTE.

You must inform the users of Sage 200 WTE of their user names to allow them to access the system. Each user can change their system generated user name and create a password the first time they log in.

The following sections explains how to view these user names, open Sage 200 WTE for the first time and change your user name.

View all WTE user names

User names are created for your remote user in Sage 200 WTE, once you have run the initial synchronisation. You can view these user names in the Administration tool. The Administration tool is a standalone file that does not have to be installed. To see your user names you must copy this file onto a computer with WTE installed.

The file can be found on your Sage 200 suite DVD in the folder WTE\Admin Tool\. See *Sage 200 WTE Administration Tool* on page 57 for more information.

To view your WTE user names

1. Locate the WTEAdmin.exe file.
2. Double click on the file to start the application.
3. Enter **Admin** in the User Name box. There is no password.
4. Select the Employee Information tab.
5. Select the relevant company from the WTE company drop-down list.
6. Select Show All Employees for this company.
7. Click Display.
8. A list of employees and their user names appears in the pane below.

These user names can be changed by your remote user within WTE.

Opening WTE

1. Open your Internet browser.
2. Enter the following address http://<Host IP address, URL or machine name>/Sage200WTE. The Login window appears.

   Note: You must enter the IP Address, URL, or machine name you specified for the Sage 200 WTE web server.
3. Enter a Username from the list in the Administration tool.
4. Click Login.

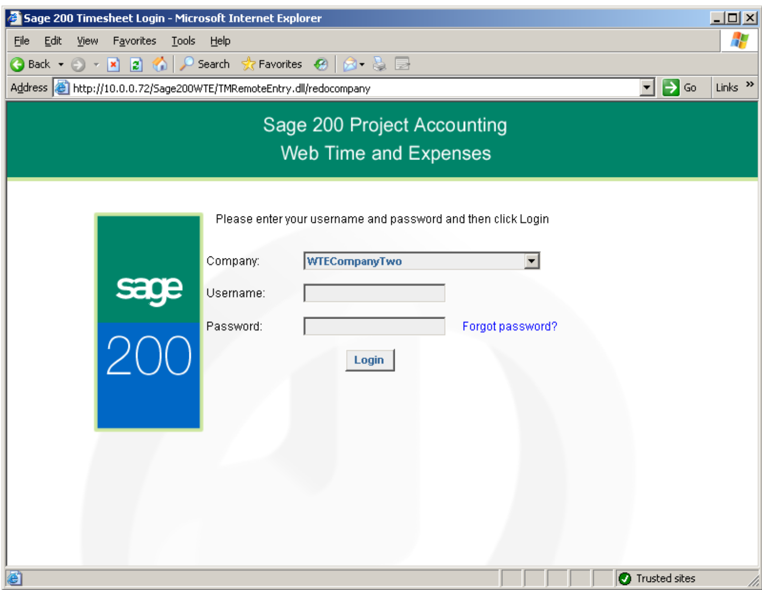
Changing user names and passwords

1. Open your Internet browser and enter the following address:

   http://<Host IP address, URL or machine name>/Sage200WTE.

   Note: You must enter the IP Address, URL, or machine name you specified for the Sage 200 WTE web server.

   The Sage 200 Timesheet and Expenses Login window appears.



2. Log on with the username created by WTE.
3. Click the Password icon. The password page appears.

- To change the username:

  Enter the old (current) username

  Enter the new username.

  Confirm this new name, by entering it again.
- To change a password:

  Enter the old (current) password

  Enter the new password.

  Confirm this new password by entering it again.

4. Click Submit.

   Note: If your users also use the Sage 200, note that the user name and password for the Web Timesheets and Expenses system are separate to those for Sage 200 Accounts. Changing the name and password here will not change the Sage 200 Accounts logon details.

Checklist

- ❑ Run schedule in AIS.
- ❑ In Sage 200 enable resources for remote entry use.
- ❑ Run schedule in AIS.
- ❑ Open WTE and login.

Chapter 7

Sage 200 WTE Administration Tool

The Sage 200 WTE Administration tool allows you to monitor your Sage 200 WTE application and the people who use it.

The tool is a standalone application which means that it does not have to be installed.

When it is first run, the Sage 200 WTE Administration tool detects what Sage 200 WTE related applications are installed. The screens are updated to show only the information that is relevant to that Sage 200 WTE configuration.

In this chapter:

Finding the Sage 200 WTE Administraton tool

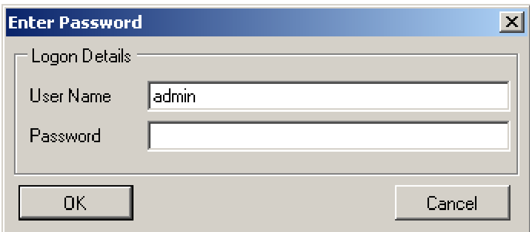
As a standalone file, the tool does not have to be installed. It is 2 portable files that can be moved via windows explorer or by a portable hard-disk, such as a USB pen-drive.

The administration tool can be found on your Sage 200 Suite DVD in the folder WTE\Admin Tool\

Logging into Sage 200 WTE Administrator

1. Locate the WTEAdmin.exe file.
2. Double-click on the file to start the application.

   The Enter Password window appears.



3. Enter the User Name and Password.

   Note: By default the User Name is *admin*. There is no password.

   This can be changed within the application. For more information, see *Change the logon details for the Sage 200 WTE Adminstration tool* on page 66.

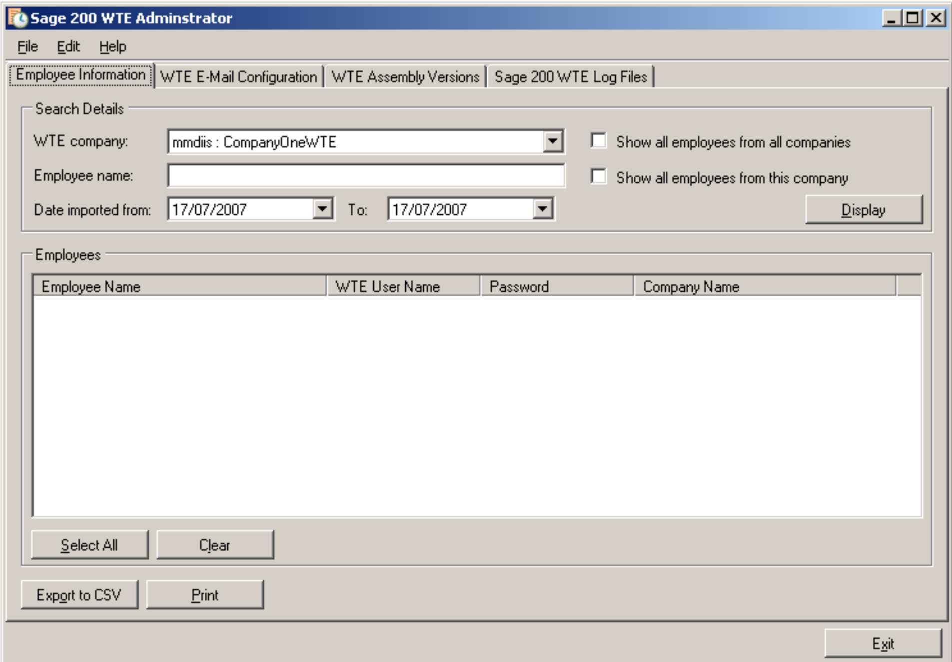
   The Sage 200 WTE Administrator opens.

Introduction

The Sage 200 WTE Administrator application is made up of several tabs. Each tab allows you to set and monitor the details of your Sage 200 WTE system.

The Employee Information tab

The Employee Information tab allows you to view the employee logon details for the Sage 200 WTE companies that are installed on the server. The Search Details area of the tab allow you to restrict the employee information that you want to view. This is useful if you have a large number of employees using Sage 200 WTE.



There are a number of ways to search for your employee records:

- Select the company from the WTE Company drop-down list to limit the employee search.
- Select the 'Show all employees from all companies' to view all of the employee records on your Sage 200 WTE system.
- Select the 'Show all employees from this company' to restrict the employee details to only those employees that are recorded for the company selected in the WTE company drop-down list.

- To find the details of a specific employee, enter the name, or part of the name for the employee.
- To restrict the details by date, enter a date in the Date imported from and the To boxes.

Once the Search Details have been selected, click Display to view the employee records.

Once the details are displayed, you can export the details.

To export your employee details

1. Select the Search Details.
2. Click Display.
3. Select the employee details that you want to export.
4. Click Export to CSV.
5. Enter the name of the file and the folder where you want to save the file.
6. Click OK to save the CSV file.

The WTE Data Reset tab

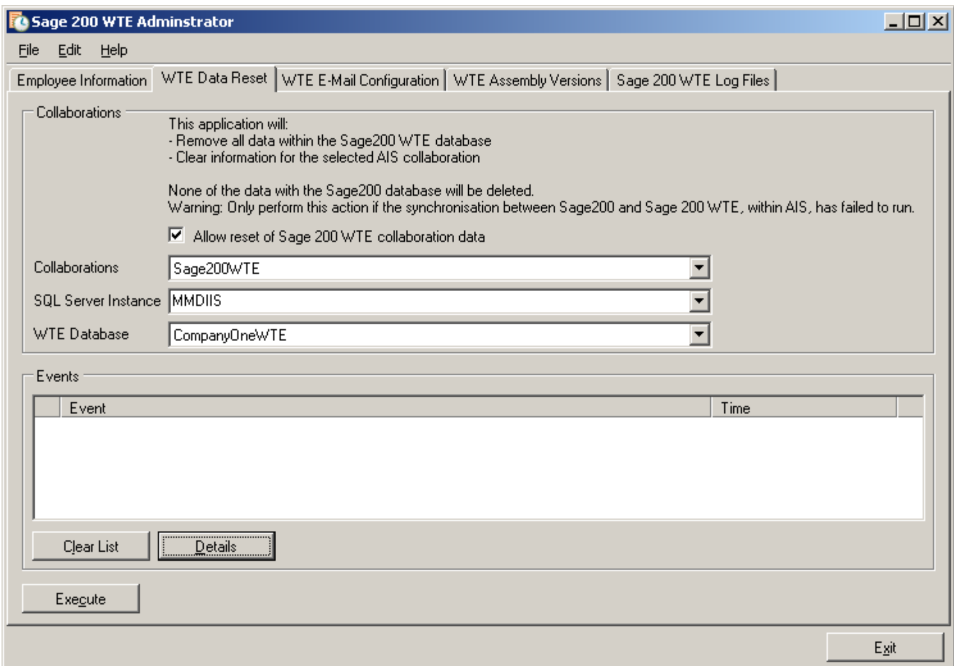
This tab can only be seen if you are running the Sage 200 WTE Administration Tool on the database server. The options on this tab allow you to reset the connection (called a collaboration). For more information on setting up a collaboration, see *Preparing and Running Sage 200 WTE for the First Time on page 47*.

You should only need to use the options on this tab when an Application Integration Service (AIS) process fails to run correctly.

Running this process will remove all of your data from your Sage 200 WTE database. Your Sage 200 accounts data will not be changed.

Once completed, you should perform a new synchronisation in AIS. The data is reimported into your Sage 200 WTE database. This may take some time if you have a large dataset.

Important Note: Any timesheets or expenses entered into Sage 200 WTE since the last successful synchronisation may be lost. Users of Sage 200 WTE should check the records they have entered to ensure that they are up-to-date.



To reset your Sage 200 WTE database

1. Close the AIS Administrator.
2. Select the 'Allow reset of Sage 200 WTE collaboration data' checkbox.

   Note: If you are using Sage CRM, the CRM collaborations will also be shown.
3. Select the WTE Collaboration that you want to reset from the drop-down list.

   Important Note for CRM Users: This tool should not be used to reset your CRM collaborations.
4. If applicable, select the SQL Server Instance from the drop-down list.
5. Select the WTE Database that you want to reset.
6. Click Execute.

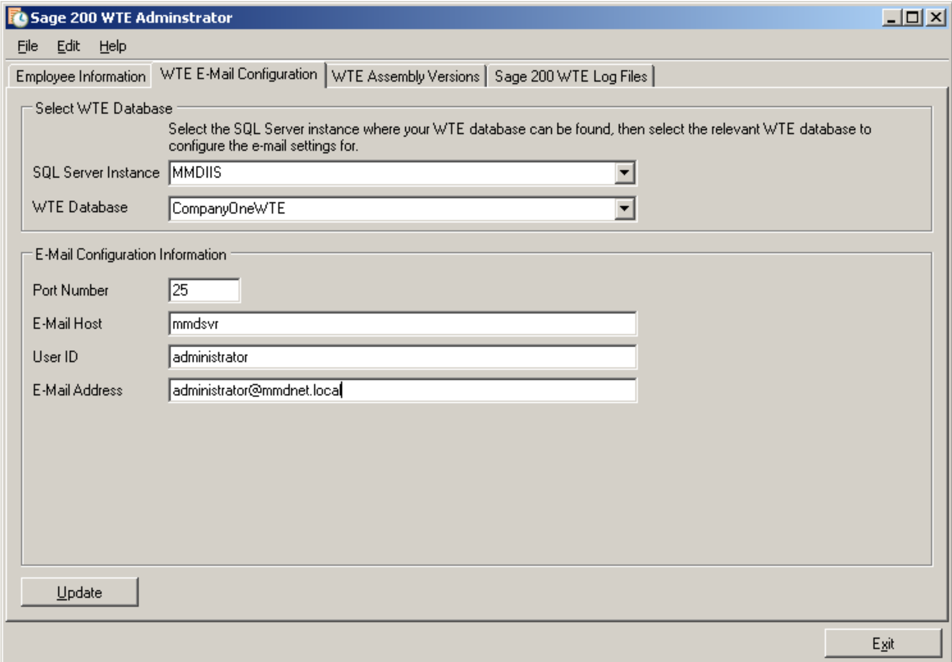
   A confirmation message appears.
7. Click Yes to confirm that you want to continue with the data reset.

   The synchronisation process may take time depending on the size of the dataset.

Once the process is complete, you can run the AIS Administrator. You should refer to the details in *Setting up the Sage 200 user record and company information* on page 42, for more information.

The WTE E-Mail Configuration tab

The WTE E-Mail Configuration tab allows you to set up the email details of the Sage 200 WTE application.



To setup your Sage 200 WTE email details

1. Select the SQL Server Instance from the list.

   A login window for the server appears.

2. Enter your SQL Server logon details. This account must have Read and Write access for the Sage 200 WTE database.

3. Select the WTE Database information from the list.

4. Enter your email information:

Port Number - The network port number used when sending emails. The default port is 25 but you should change this if your network configuration is different.

E-Mail Host - This should be set to your email mailbox. For example, smtp.companyname.com. This can also be an IP address.

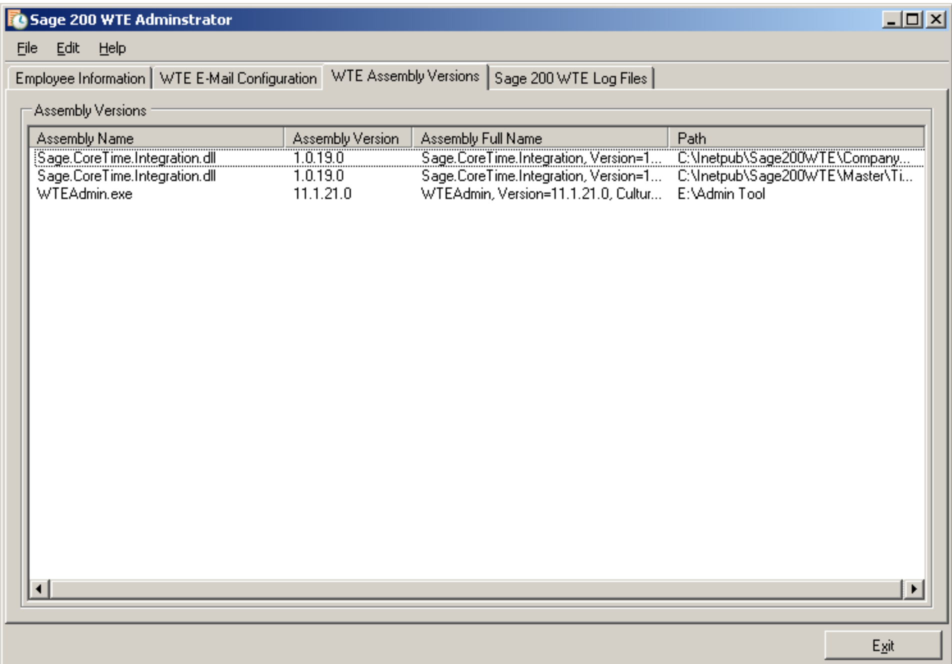
User ID - Specify the name of the email host.

E-Mail Address - Specify the name of the email address where any error messages from your Sage 200 WTE application are sent.

5. Click Update to connect these details to the selected Sage 200 WTE database.

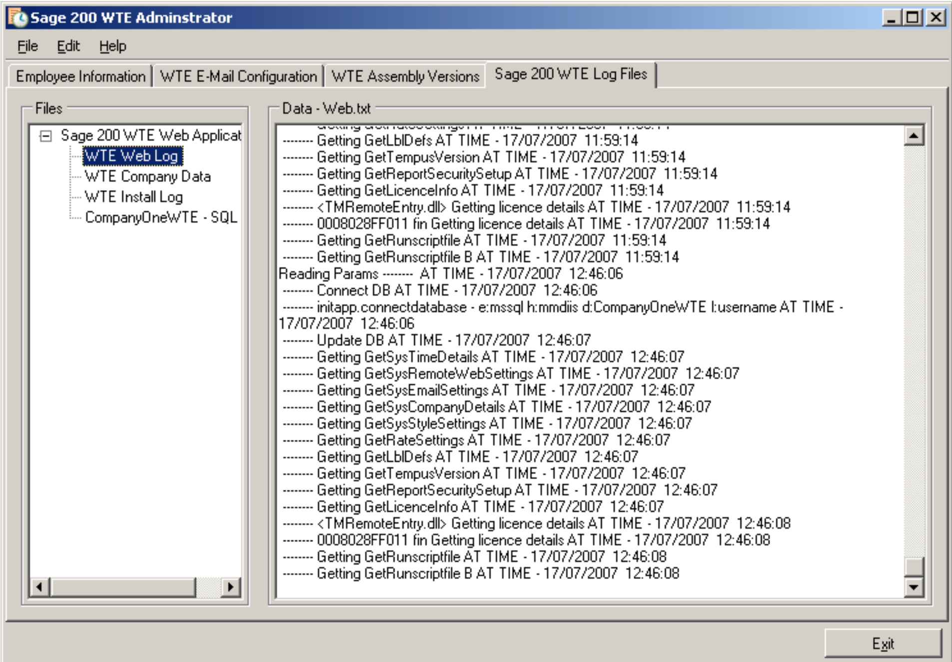
The WTE Assembly Versions tab

The WTE Assembly Versions tab displays all of the installed files that are associated with your Sage 200 WTE application. The information on this tab is updated automatically as the Sage 200 Administrator accesses the Sage 200 WTE program.



The Sage 200 WTE Log Files tab

The Sage 200 WTE Log Files tab allows you to view any system information generated by your Sage 200 WTE application.



The files that are available to view are listed in the left pane. You can select either:

- Application Integrated Services or,
- Sage 200 WTE Web Application.

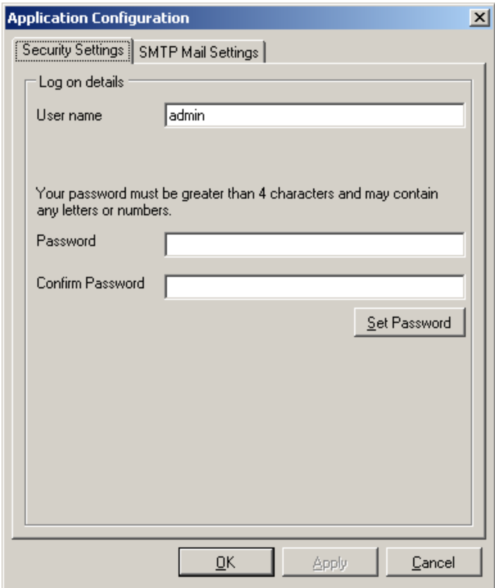
Double-click on either option and then select the log that you want to view. Once selected the right hand side of the window displays the information generated by the Sage 200 WTE program.

Change the logon details for the Sage 200 WTE Adminstration tool

By default, the User Name for your Sage 200 WTE application is admin. There is no password. You can change these details from the Application Configuration window.

To change the user name and password

1. Log on to the Sage 200 WTE Administration tool.
2. Select Edit > Configuration.



3. Edit the User name and Password details on the Security Settings tab.
4. Confirm the new password by re-entering the password in the Confirm Password box.
5. Click Apply to accept the changes.
6. Click OK to close the window.

Chapter 8

Administering WTE

This chapter explains how to administer your Web Timesheets and Expenses, once installed. There are desciptions of how to change user names and passwords for your WTE users, how to set up synchronisation between WTE and Sage 200 and how to add companies.

In this chapter:

Setting Up Synchronisation

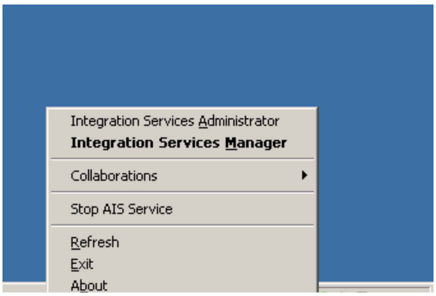
The synchronisation manages the transfer of data between Sage 200 Accounts and Sage 200 WTE. You can choose to run the synchronisation according to a schedule or on demand. This synchronisation is managed in Sage Application Integration Services (AIS).

During the synchronmisation process, Sage 200 Accounts updates Sage 200 WTE first. If modifications have been made in both Sage 200 Accounts and Sage 200 WTE, the Sage 200 changes will take priority and may overwrite the Sage 200 WTE changes. We recommend that you run the synchronisation process as frequently as possible for your system. This minimises occasions where changes to the Sage 200 WTE data are not updated in Sage 200 Accounts.

To configure synchronisation

1. Right click the Sage Application Integration Services icon located on the your desktop's taskbar.

   A pop-up menu appears.



2. Select Integration Services Administrator.

   The 'Integration Services' window is displayed.

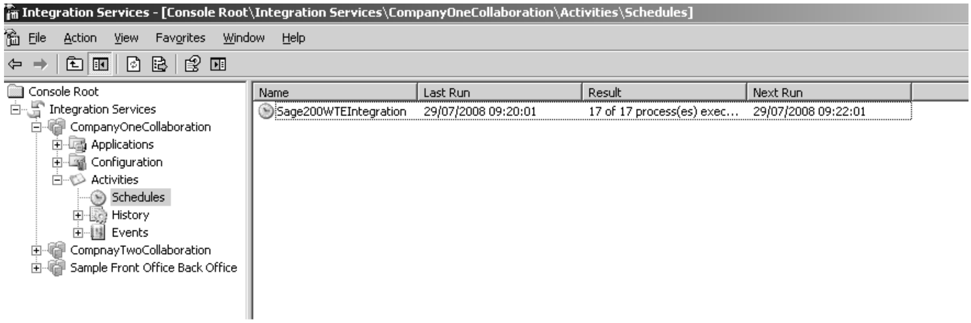
3. Select Integration Services in the left pane, followed by the company data that you want to synchronise.

4. Click Activities.

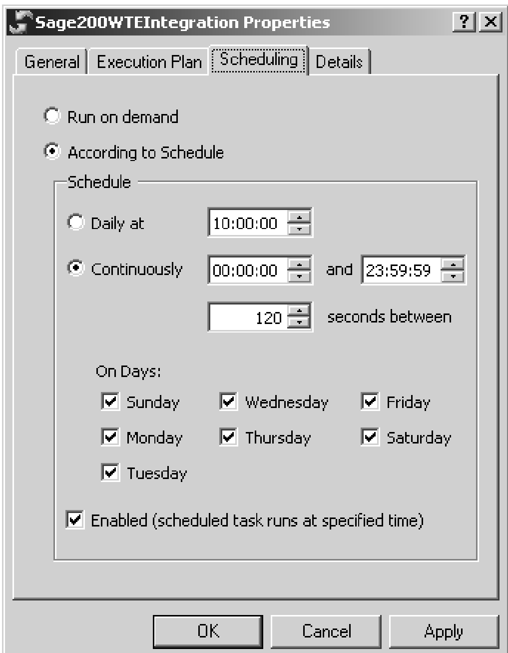
   The right pane displays information relating to the collaboration.

5. Click Schedules.

   The right pane updates to display the schedules.



6. Right-click 'Sage200WTEIntegration' and then select Properties.
7. Select the Scheduling tab.



8. Enter the details to set the synchronisation schedule.

   Select 'According to Schedule' to set the schedule. Complete the schedule options as required.
9. Click Apply to save the changes.

10. Click OK to close the window.

Setting up email notifications

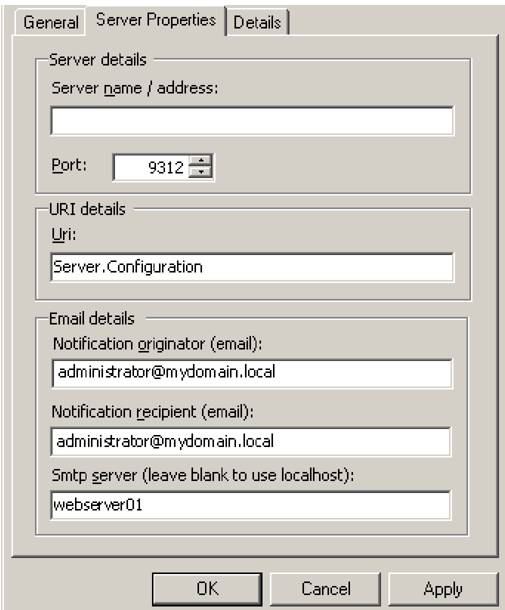
You can set up email notifications for your collaborations. You can set up the system so that an email is sent to the person who is set up as an Administrator for WTE every time a process is run.

To set up email notifications

1. In the Task Bar, click on the AIS icon and select Sage 200 Integration Services.

   AIS opens.

2. On the AIS window, select the Integration Services that you want to add the notification email.
3. Right-click and select Properties from the menu.
4. Select the Server Properties tab.

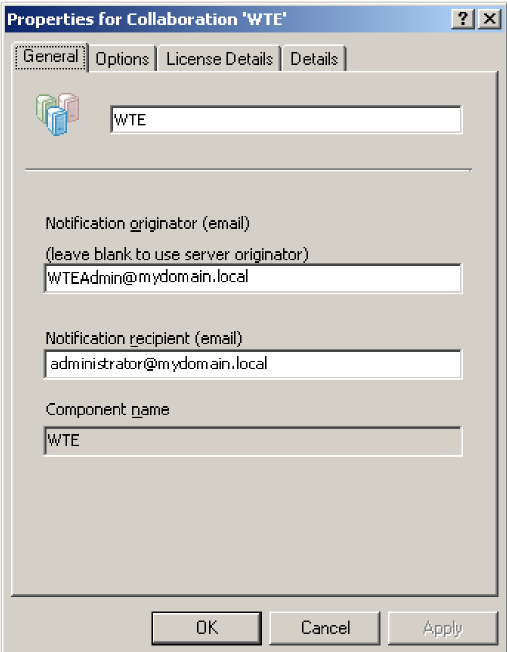


5. Enter the information into the Email details section.
   - The 'Notification originator (email)' is the address that will appear in your Inbox when an email is sent.
   - The 'Notification recipient (email)' is the email that the notification message will be sent to.

- The 'SMTP server' is the machine name of your mail server.

6. Click Apply to save the changes.
7. Click OK to return to AIS. You should now set up the email details for the WTE collaboration.
8. Select WTE in the window.
9. Right-click on WTE and select Properties from the menu.

   The General tab is displayed by default.
10. Enter the 'Notification originator (email)' details on the tab.



11. Click Apply to save the changes.
12. Click OK to close the window.

    Note: If you are using a multi-company version of WTE you must set up the notification emails for every collaboration in WTE.

You will now receive an email every time AIS runs a process. The email will indicate whether the process ran successfully. If the process was not successful you can check the Event Log in AIS to find an explanation of the problem.

Note: If authentication is required on your internal SMTP server you must configure the AIS service to run with the Windows user credentials required for the email account. This can be done by running the services console from Administrative tools > Services. To do this:

1. Select the service Integrations Services
2. Select Properties
3. Select the LogOn tab and select 'This account'.
4. Enter the username and password for your SMTP enabled account.
5. Click OK to apply these changes.

You must restart the service for these changes to take effect. You cannot use an SMTP server that is located on the internet. The SMTP service should be accessible on the domain that the account exists in.

Adding a New Company

Adding a new company in Sage 200 WTE, follows a similar process as installing WTE for the first time.You must have a user record set up in the Sage 200 System Administration application for each WTE company that you want to create.

Each new WTE company will use the default website you selected when installing Sage 200 WTE application.

To add a new company in Sage 200 WTE:

1. Create a new Sage 200 WTE user record in Sage 200 System Administration. You must have separate Sage 200 WTE user records for each Sage 200 WTE company.
   Make sure this user record is the member of the AIS users role and has access to the Sage 200 company that you want to integrate with Sage 200 WTE.
   Add this user as a Resource in the Sage 200 company that you want to integrate with Sage 200 WTE.
   See *Creating a Sage 200 WTE user record in Sage 200 Accounts* on page 9.
2. Run the WTE installer to create a new company in Sage 200 WTE.
   Select 'Add Company' from the first page of the wizard. Then follow the steps for installing Sage 200 WTE (you will not need to select a default website).
   See *Installing Sage 200 WTE* on page 16.
3. Test the new company web services and web application.
   See *Testing the Sage 200 WTE Company Web Services* on page 24.
4. Create a collaboration for the new WTE company in AIS.
   From the Start menu, choose Programs > AIS Collaboration wizard.Then follow the steps for creating an AIS Collaboration.
   See *Configuring AIS* on page 39.
5. Synchronise the WTE company data with your Sage 200 Accounts data.
   See *Prepare and Run the Initial Synchronisation* on page 48.
6. Set up and Synchronise your remote entry users.
   See *Prepare and Run the Initial Synchronisation* on page 48.
7. Set up the WTE user names and passwords for the new WTE company.
   See *Setting up Sage 200 WTE* on page 52.

Removing an Existing Company

You can remove a company from WTE by running the Sage 200 WTE Installer.

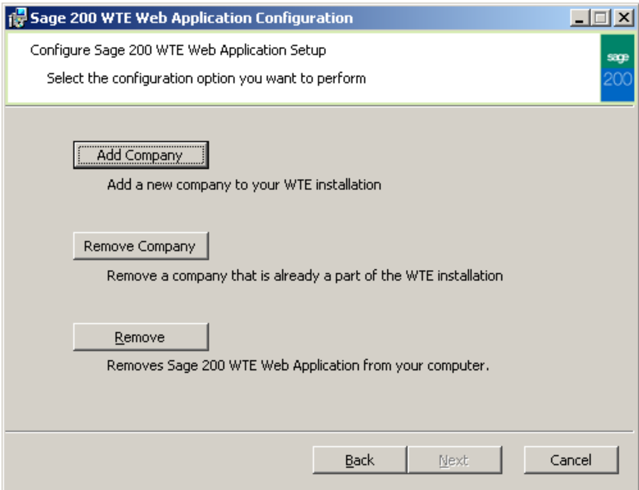
To remove an existing company

1. Run the Sage 200 WTE Installer.

   The Welcome to the Sage 200 WTE Installer Wiazrd window appears.

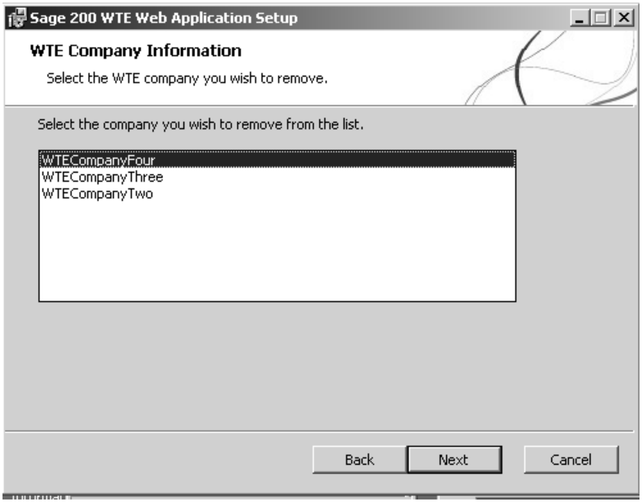
2. Click Next.

   The WTE Company Information window is displayed.



3. Select Remove Company and click Next.

   The WTE Company Information window displays all of the currently installed companies within the Sage 200 WTE application.



4. Select a company.
5. Click Next.

   The Ready to Remove Company window is displayed.
6. Click Install.

   The selected company is removed from Sage 200 WTE.

Uninstalling Sage 200 WTE

When removing Sage 200 WTE completely all companies will also be removed. The database for each company is not deleted. You must delete the databases manually.

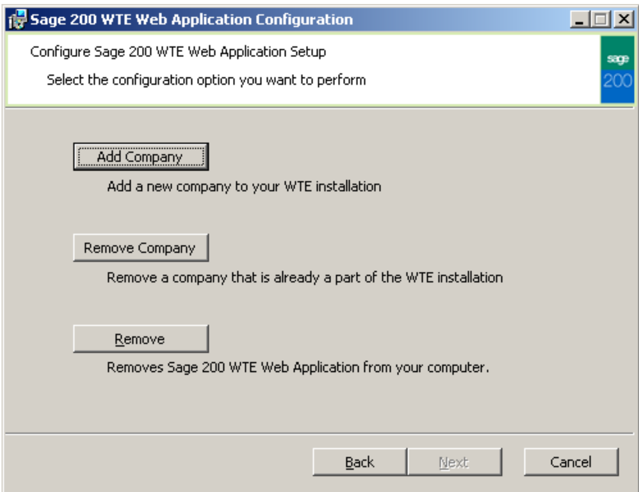
To remove Sage 200 WTE

1. Run the Sage 200 WTE installer.

   The Welcome to the Sage 200 WTE Installer Wizard window appears.

2. Click Next.

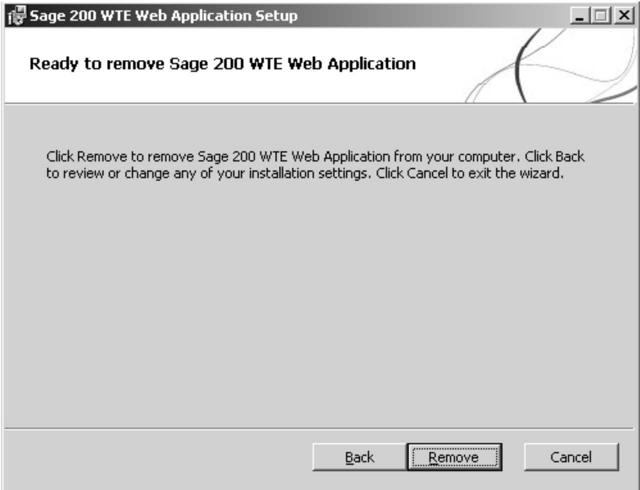
   The WTE Company Information window is displayed.



3. Select Remove.

4. Click Next.

   The Ready to Remove sage 200 WTE Web Application window is displayed.



5. Click Remove.

   Sage 200 WTE is removed from your computer.

Chapter 9

Troubleshooting

This chapter explains some common queries and issues with the Sage 200 WTE installation.

In this chapter:

Troubleshooting the Sage 200 WTE Configuration

Where do I look first when I have problems with the Sage 200 WTE?

- Sage 200 WTE has a log file where information about the connections and workings of the program are saved. This file also contains information all about errors in the program. The file is C:\Inetpub\Sage200WTE\Web.txt.

  Some of the errors logged in this file are explained in more detail later in this chapter.
- AIS also has a log file with information about errors that occur.

  The file is: C:\ProgramFiles\IntegrationServices\bin\Configuration\Collaborations\'*Collaborationname*'\logs\errors.log.

Both of the files can viewed using the Sage 200 WTE Administration Tool. See *The Sage 200 WTE Log Files tab* on page 65.

My Sage 200 WTE web services will not connect with AIS

There are many reasons why a connection to the web services cannot be established,

Step 1: Check the Directory Security for Sage 200 WTE

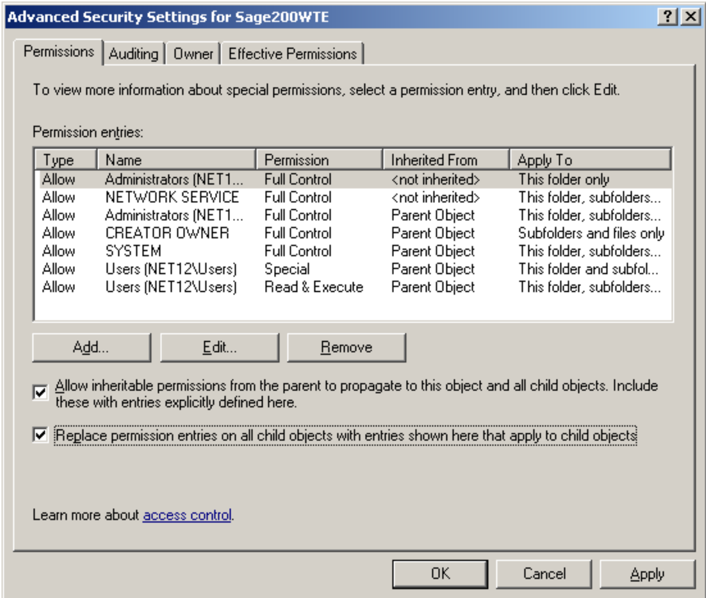
Users of the web application and the web services must have access Sage 200 WTE related files and services on the web server. This is usully done by default as part of the WTE installation process.

To configure the Directory Security for Sage 200 WTE:

1. From Windows Explorer, select C:\InetPub.
2. Right-click the Sage 200 WTE folder. Select Properties and then select the Security tab.
3. Select the IUSR_<machine name> account.
4. The associated rights appear in the Permissions for IUSR box.
5. Select the Full Control check box.

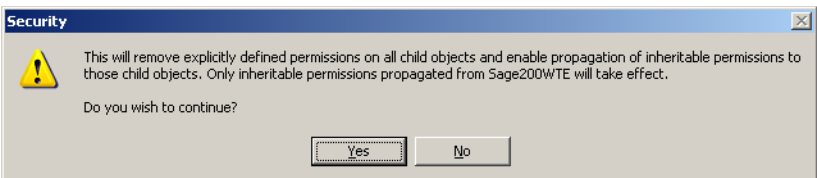
   All the other check boxes are selected.
6. Click Advanced.

   The 'Advanced Security Settings for Sage200WTE' window appears.



7. Select the 'Replace permission entries on all child objects with entries shown here that apply to child objects' check box and click Apply.

   The following message appears.



8. Click Yes to apply the changes to the sub directories.

   You are returned to the Sage200WTE Properties window. The directory for operations is successfully configured with the web application and services.

9. Click OK.

10. Repeat this procedure for the following users.

    - IWAM_<machine name>
    - NETWORK
    - NETWORK SERVICE
    - INTERACTIVE

11. Select Apply, then click OK.
12. Make sure the Inetpub folder is not set to read only

Step 2: Check WTE is configured correctly

Connection problems are often due to incorrect connection settings in the database. Any configuration errors in Sage 200 WTE are recorded in the web.txt file. Use the Sage 200 WTE Administration Tool to view the file.

For more information see *The Sage 200 WTE Log Files tab* on page 65.

One possible error is:

- The file shows a connection could not be established with the server and SQL Server 2005 is installed.

  This is because SQL Server 2005 does not, by default, accept any incoming connections from the network.

  To resolve this you must run the SQL Server 2005 Surface Area Configuration Tool. To do this:

  1. From the Start menu, select Programs > SQL Server 2005 > Configuration tools.
  2. Select 'Surface Area Configuration for Services and Connections'.
  3. Select Remote Connections from the SQL 2005 tree view.
  4. Select the 'Local and remote connections' and 'Using TCP/IP' only options.
  5. Restart the SQL Server services.

My synchronisation fails and I get the message, 'Spool Path does not exist'

Integration Services are installed with AIS. This service is assigned a Windows logon account. This allows it to run with no user logged on to the workstation. This is a local Windows system account and does not have network access rights.

When Sage 200 Accounts is installed, the spool path, which is used for report printing, can be specified as a network path, i.e. '\\Sage002847\Spool'. If AIS attempts to connect to the Sage 200 Accounts database via a third party connection it tries to use this path. The connection fails because it cannot see this path.

You must add a network user account to Integration Services.

1. From the Start menu, select Run.
2. Enter **services.msc** in the Open box and click OK.
3. Right-click Integration Services from the right hand pane of the Services window.

4. Choose Properties from the pop-up menu.
5. Select the Log On tab. Select This account.
6. Enter the logon details for a network user account that has access to the network path.
7. Click OK.
8. Restart the AIS service.

The MMSV4Adapter application in AIS is inactive. When I view the Properties, there is no Configuration tab. It also has no entities associated with it.

When AIS starts up, it looks for any new adapters that are installed. It then creates or amends a file called 'assemblies.xml'. This file contains all of the information about the adapters that are installed so that AIS does not have to repeat this next time it starts up. If the data in this file is incorrect, the adapter will be inactive when AIS restarts.

You will need to delete the assemblies.xml file.

1. Stop the AIS service. Right-click on the AIS icon in the system tray and select Stop AIS Service.
2. Delete the assemblies.xml file.

   If AIS was installed using the default path, the file will be in the following location; C:\Program Files\Integration Services\bin\Configuration\Assemblies\.
3. Restart AIS. Right-click on the AIS icon in the system tray and select Start AIS Service.

When AIS starts, it will re-create the assemblies.xml file and the adapter will be active.

Why does the WTE Adapter installer run when I restart AIS?

This is an issue with the Windows Installer.

The solution and a tool are available on the Microsoft website: http://support.microsoft.com/kb/290301

Download the tool and run it on the relevant server.

When running AIS I get the error message 'Employee synchronisation process threw an exception'. The resulting errors.log file shows the date/time are in the incorrect format

The regional and language options for Windows are incorrect.

- Make sure the regional and language options in Windows are set to English (United Kingdom).
  The date format should be dd/mm/yyyy. The time format should be hh:mm:ss

  1. From the Control Panel, select regional and language options.
  2. Set the region to English (United Kingdom).
  3. Select the Advanced tab. Set the language for non uni-code programs to English (United Kingdom).
  4. Select the 'Default User Accounts settings' checkbox.
  5. Click Apply to save the changes

- In the SQL Server, make sure the logon accounts for Sage 200 WTE and Sage 200 Accounts are set to English by default.
- Make sure the IIS Service network logon accounts settings are set to dd/mm/yyyy for the date and hh:mm:ss for the time.

  1. From the Start menu, select Run.
  2. Enter **regedit** in the Open box and click OK.
  3. Select the HKEY_USERS key.
  4. Open each of the service logon accounts and select Control Panel > International.
  5. Select the 'sShortDate' key in the right hand pane.
  6. Make sure this is set to dd/mm/yyyy.
  7. Restart AIS.

Troubleshooting Running the Sage 200 WTE Application

When synchronising Sage 200 WTE with Sage 200 Accounts, I get invalid cost item, invalid expense item, or invalid project error messages.

This occurs when a cost item, expense item or project, is created in Sage 200 Project Accounting and then imported into Sage 200 WTE during the synchronisation process. This cost item, expense item or project is subsequently deleted from Sage 200 Project Accounting.

A WTE user then creates a new timesheet or expenses claim with this cost item, expense item or project. As these items no longer exist in Sage 200 Accounts, you will get these error messages the next time the synchronisation is run.

You must delete or amend the timesheet or expenses claim that uses the cost item, expense item or project in Sage 200 WTE.

I have entered timesheets and expenses for a weekend, but they are not being posted to Sage 200 Project Accounting.

AIS filters out any records that have been entered on a weekend, when the Allow Weekend Working option is not selected in Sage 200 Project Accounting.

In Sage 200 Project Accounting, make sure you select Allow Weekend Working.

1. In Sage 200 Project Accounting, choose Utilities > System Setup > Timesheet and Expense Claim Settings.
2. Select the Timesheets tab.
3. Select the Allow Weekend Working option.
4. Click OK.

My timesheets and expense claims are posting directly to Sage 200 Financials or Project Accounting when data is synchronised.

This is because you have chosen not to authorise your timesheets or expense claims in Sage 200 Project Accounting, and you have chosen to post your timesheets or expense claims automatically.

You need to change your timeheets and expense claim settings to make sure you either;

- authorise your timesheets or expense claims or
- manually post your timesheets and expenses to Sage 200 Project Accounting and Financials.

You can change these options in Sage 200 Project Accounting > Utilities > System Setup > Timesheet and expense claim settings.

The license screen has re-appeared after Sage 200 WTE has been licensed and it shows a different Mac Address.

On a standard web server there are two network cards. Each of these cards has a unique MAC address. Normally Windows will use a specific MAC Address first. This is the MAC Address that was used to license Sage 200 WTE. However, changes such as a new hard drive or RAM, can cause the MAC address to be taken from the other card. On some systems, old and new MAC addresses will be randomly used.

When a different MAC address is returned when requested by Sage 200 WTE, you will be asked for a new activation code.Use the following steps to set up another Mac Address.

1. Get the MAC address of the second network card. This can be found by using the command prompt IPConfig /all.

   Go to Start > Run. Enter **Command** and click OK.

   Enter **IPconfig /all**

2. Note all the Mac Addresses for the host server.
3. From the Enterprise Manager, open the database of the company.
4. Open the SystemParams table and find the field MacAddress 2.
5. Enter the second MAC Address in this field.

Appendix A

Sage 200 WTE Checklists

This appendix contains a series of checklists to help you install, configure and administer Sage 200 WTE.

In this chapter:

Sage 200 Suite Setup Installation Checklist

This checklist shows you the setup that is required for the integration of Sage 200 WTE with your Sage 200 accounts program. This is based on the standard configuration.

Database Server

Ensure the following are installed:

- ❑ SQL
- ❑ Sage 200 File Server
- ❑ Sage 200 Web Server

Sage 200 WTE Web Server

- ❑ IIS v6 or above.

Client

Ensure the following are installed and configured:

- ❑ Internet Explorer
- ❑ Sage 200 Client

Sage 200 WTE Installation Checklist

Use the checklist to give you an overview of the installation procedure for Sage 200 WTE.

Sage 200 WTE Prerequisites

- ❑ Web Server IP Address/URL.
- ❑ Database Server IP Address/Machine Name.
- ❑ SQL Server System Administrator logon name and password.
- ❑ Sage 200 WTE Web Application Activation Code.
- ❑ Microsoft .Net Framework v3.5 installed on web server.
- ❑ Microsoft .Net Framework v3.5 installed on application server.
- ❑ IIS v6 or above installed and running on the Web server.

Installing Sage 200

- ❑ Install Sage 200 Server on application server.
- ❑ Install Sage 200 Client on application server.
- ❑ Configure Sage 200 on application server.
- ❑ Create AIS user in Sage 200 System Administraton.
- ❑ Create an AIS role in Sage 200 System Administration for each Sage 200 WTE company.
- ❑ Set the role properties to 'Remote Access Only'
- ❑ Make sure all AIS users are memebers of the AIS role.
- ❑ Create a resource associated with the AIS user within Sage 200 Accounts.
- ❑ Set resource to allow entry of others timesheets and expenses.
- ❑ Set resource to allow authorisation of timesheets.
- ❑ Set resource as an authoriser for all remote users.

Installing Sage 200 WTE

- ❑ Install Sage 200 WTE web application on web server

Installing Application Integration Services (AIS)

- ❑ Install AIS on application server
- ❑ Install AIS adapters on the application server
- ❑ Run through collaboration configuration wizard

Running AIS schedules for the first time

- ❑ Register Sage 200 WTE web application with activation key
- ❑ Run schedule in AIS
- ❑ In Sage 200 enable resources for remote entry use
- ❑ Run schedule in AIS
- ❑ Enable schedule

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