

Sage 200 Extra

System

Requirements and

Prerequisites

2017

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# Contents |

<b>Changes for 2017</b> .....	<b>4</b>
<b>Introduction</b> .....	<b>5</b>
<b>Prerequisites</b> .....	<b>6</b>
<b>Supported software</b> .....	<b>8</b>
<b>Security and firewall settings</b> .....	<b>14</b>
<b>Minimum specifications for client and server machines</b> .....	<b>17</b>

# Changes for 2017

The following changes have been made to this guide for version 2017:

## Now supported for this version

Windows Server 2016

iOS v10

## Support removed for this version

Operating systems that are no longer supported:

- Server 2008 R2
- Terminal services virtual machine based desktop deployment -- this was previously supported with Server 2008 R2.

Browsers version that are no longer supported:

- iOS 9 - apart from Sage 200 CRM
- IE 10 - apart from Server 2012 only. Note: IE 10 is not supported for CRM on any operating systems.

Prerequisites that are no longer required

- Microsoft DotNet Framework version 3.5

## Other changes

### Excel Integrated reporting

This has been removed from 2017, as this has been replaced by new Excel reporting functionality. This was removed by default from the desktop app in 2015 but could be reinstated via system Administration. This is no longer possible.

# Introduction

This guide is designed to provide Sage 200 Business Partners and customers the system requirements for Sage 200 Extra 2017.

**Note:** Sage 200 can be installed as an On Premise or Online deployment. The installation instructions are different depending on your installation method. If you are installing Sage 200 Extra Online, please see the Sage 200 Extra Online System Requirements.

Sage 200 is made up of various core and optional modules that integrate with the core product. When determining your system requirements, you must make sure that you have considered the requirements for all the Sage 200 modules that you want to use, as some modules have different system requirements.

The application footprint on each of the Sage 200 client machines can be large. Each of the client machines that run Sage 200, as well as the servers, must meet the minimum specification. See [Minimum specifications for client and server machines on page 17](#).

If you are installing Sage 200, you must read the Deployment and Installation Guide first.

**Note:** The System Requirements shown here were correct at time of publication. Later versions of operating systems or applications may be supported. See [Ask Sage Article no 31973](#) for an updated list.

# Prerequisites

Before you install Sage 200, you must make sure the required prerequisites are installed on your system. You must also make sure that your installations of Microsoft SQL Server and Microsoft Internet Information Services (IIS) have the required settings.

- ✓ All client and server machines must have regional and language settings set to either **English (UK)** or **English (Ireland)** only.
- ✓ All server and client machines must follow these specific naming conventions:  
All machine names must start with a letter, end with a letter or digit, and have as interior characters only letters, digits, and hyphens.  
For more information about Domain name rules see section 2.3.1 of the following article:<http://www.faqs.org/rfcs/rfc1035.html>
- ✓ Your domain controller must **not** be set to **Read Only**.
- ✓ Machines running Sage 200 must have a **c:\** drive although Sage 200 can be installed and run from a drive other than **c:\**.
- ✓ Microsoft DotNet Framework versions installed (all server and client machines):
  - ✓ v4.5.1
- ✓ Windows Identity Foundation [Microsoft KB 974405](#) (all server machines). This can be added as feature.

- ✓ Microsoft Internet Information Services (IIS) v8 or greater with the following settings:

Settings for IIS v8 , 8.5 & 10	
.Net Framework 4.5 Features	WCF Services HTTP Activation
Common HTTP Features	Default Document Directory Browsing HTTP Errors HTTP Redirection Static Content
Application Development	.Net Extensibility 3.5 .Net Extensibility 4.5 ASP ASP.NET ASP.NET 3.5 ASP.NET 4.5 ISAPI Extensions ISAPI Filters
Security	Request Filtering  Windows Authentication
Management Tools	IIS Management Console
Management Tools > IIS 6 Management Compatibility	IIS 6 WMI Compatibility IIS 6 Metabase compatibility

- ✓ Microsoft SQL Server :
  - ✓ Must be running in Mixed Mode (SQL Server and Windows Authentication mode).
  - ✓ The **Server Collation** for SQL server must be set to **Latin1\_General\_CI\_AS**.
  - ✓ If you're using Business Intelligence, SQL Server and Analysis Services must be installed on the same machine with the same instance name.

# Supported software

## Operating systems

### Sage 200

	Server	Client
Windows 7 SP1 (32-bit and 64-bit) (Professional, Enterprise & Ultimate Editions) <sup>1</sup>	✗	✓
Windows 8.1 (32-bit and 64-bit) (Pro and Enterprise Editions) <sup>1</sup>	✗	✓
Windows 10 (32-bit and 64-bit) (Pro and Enterprise Editions) <sup>1</sup>	✗	✓
Windows Server 2012 (Standard, Essentials & Datacenter Editions)	✓	✓
Windows Server 2012 R2 (Standard, Essentials & Datacenter Editions) <sup>2</sup>	✓	✓
Windows Server 2016 (Standard, Essentials & Datacenter Editions)	✓	✓

<sup>1</sup> Not supported for production environments but may be used for demonstration and training purposes only

<sup>2</sup> Windows Server 2012 R2 with Updates version (released Nov 2014) - There is a known issue with the Sage 200 Core Components when installed on this version of 2012 R2

### Sage 200 migration tools

	Classic Migration tool	50 - 200 Migration tool
Windows 7 SP1 (32-bit and 64-bit) (Professional, Enterprise & Ultimate Editions)	✓ (32 bit only)	✓
Windows 8.1 (32-bit and 64-bit) (Pro and Enterprise Editions)	✗	✓
Windows 10 (32-bit and 64-bit) (Pro and Enterprise Editions)	✗	✓
Windows Server 2012 (Standard, Essentials & Datacenter Editions)	✗	✗
Windows Server 2012 R2 (Standard, Essentials & Datacenter Editions)	✗	✗
Windows Server 2016 (Standard, Essentials & Datacenter Editions)	✗	✗



## Sage 200 CRM

	Server	Client
Windows 7 SP1 (32-bit and 64-bit) (Professional, Enterprise & Ultimate Editions)	✗	✓
Windows 8.1 (32-bit and 64-bit) (Pro and Enterprise Editions)	✗	✓
Windows 10 (32-bit and 64-bit) (Pro and Enterprise Editions)	✗	✓
Windows Server 2012 (32-bit and 64-bit) (Standard & Essentials)	✓	✓
Windows Server 2012 R2 (32-bit and 64-bit) (Standard & Essentials )	✓	✓
Windows Server 2016 (32-bit and 64-bit) (Standard and Essentials)	✓	✓

Sage 200 CRM is not supported when it is installed more than once on the same server.

## Remote desktop (formerly Terminal Services)

### Sage 200

	Server	Client
Windows Server 2012 *	✓	✓
Windows Server 2012 R2 *	✓	✓
Windows Server 2016 *	✓	✓

\* The application must be deployed using 'Session based Desktop Deployment' with a published remote desktop. 'Virtual machine based desktop deployment' is not supported.

For Terminal servers, Remote Desktop Services servers hosting Sage 200 client sessions, you must allow:

- At least 600MB memory per user on the server, for each client session running occasional or one-off tasks, such as an account enquiry or price check.
- At least 1GB memory for each client session processing for any prolonged period of time, for tasks such as checking in stock, or creating purchase orders.
- You should run large batch processes and updates on the local area network, or out of hours.
- The application must be deployed using 'Session based desktop deployment' with a published remote desktop. 'Virtual machine based desktop deployment' is not supported.

## Sage 200 CRM

	Server	Client
Windows Server 2012 R2 *	✓	✓

\* The application must be deployed using 'Session based Desktop Deployment' with a published remote desktop. 'Virtual machine based desktop deployment' is not supported.

If you are using form launching for Sage 200 CRM, the Task Launcher Service:

- Needs to be enabled and set to start 'Automatically'.
- Must be set to run in multi-user mode for each user.

## SQL server

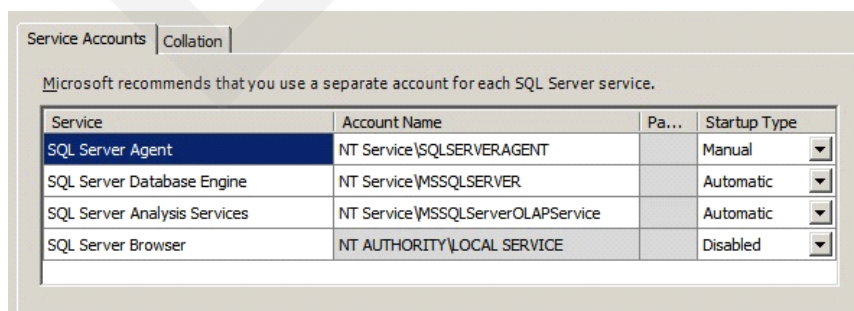
### Sage 200

Microsoft SQL Server 2012 SP3 - Standard, Enterprise & Datacenter Editions (32 & 64-bit).	✓
Microsoft SQL Server 2014 SP2 - Standard, Business Intelligence, Enterprise & Datacenter Editions (32 & 64-bit).	✓
Microsoft SQL Server 2016 SP1- Standard, Business Intelligence, Enterprise & Datacenter Editions (32 & 64-bit)	✓

### Prerequisites for SQL server

Sage 200 is not supported when SQL server is installed on a Domain controller.

- SQL server must be running in Mixed Mode (SQL Server and Windows Authentication mode).
- The **Server Collation** for SQL server must be set to **Latin1\_General\_CI\_AS**.
- We recommend that you use the default accounts set up by the SQL server installation wizard. (In previous editions of Microsoft SQL Server, we recommended running SQL Server as Local System Accounts.)



**For BI**

- BI is not supported on Workgroup editions of SQL server. This is because Business Intelligence requires Analysis Services.
- Microsoft SQL Server and Analysis Services must be installed on the same machine with the same instance name.

**Sage 200 CRM**

Microsoft SQL Server 2012 SP3 - Standard or Enterprise Editions (32 & 64-bit ).	✓
Microsoft SQL Server 2014 SP2 - Standard or Enterprise Editions (32 & 64-bit).	✓
Microsoft SQL Server 2016 SP1- Standard or Enterprise Editions (32 & 64-bit)	✓

**Web Browsers****Sage 200**

	Desktop App	Web App
Microsoft Internet Explorer v10 or Edge on x86 and x64 based PCs - supported on Server 2012 only	✓	
Microsoft Internet Explorer v11 or Edge on x86 and x64 based PCs	✓	
Microsoft Internet Explorer v11 or Edge on Microsoft Windows 8.1 tablets running Windows 8 Professional and Enterprise Editions		✓
Safari on Apple iPad running iOS v10		✓
Google Chrome on x86 and x64 based PCs and 10", 7" and 6" Android devices		✓

**Note:** Other devices and browsers may be compatible but have not been tested.

**Sage 200 CRM**

Microsoft Internet Explorer v11	✓
Microsoft Edge	✓
Safari for IOS v9 and above	✓

Chrome - latest version	✓
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## Microsoft Office

### Sage 200

Functions in Sage 200	2013 SP1 *		2016*		Office 365 #	
	32-bit	64-bit	32-bit	64-bit	Desktop Apps	Online App
Excel Reporting (new)	✓	✓	✓	✓	✓	✗
Send to Excel (from workspaces and lists)	✓	✓	✓	✓	✓	✓
Opening Attachments	✓	✓	✓	✓	✓	✗
Send Email (not from Report Designer)	✓	✗	✓	✗	✓	✗
Report Designer - output to email	✓	✗	✓	✗	✓	✗
BI	✓	✗	✓	✗	✗	✗

\* 2013 and 2016 - Standard, Home and Business, Small Business Premium, Professional Plus, and Enterprise Editions

# Office 365 - Small Business Premium, Professional Plus and Enterprise Editions. Home and Personal editions are not supported.

**Note:** Office 365 has only been tested with Office 2016 Apps.

### Sage 200 CRM

	2013 SP1		2016		Office 365	
	32-bit	64-bit	32-bit	64-bit	Desktop Apps	Online
Mail merge	✓	✓	✓	✓	✓	✗

	2013 SP1		2016		Office 365	
	32-bit	64-bit	32-bit	64-bit	Desktop Apps	Online
Data Upload	✓	✓	✓	✓	✓	✗
Document Drop	✓	✓	✓	✓	✓	✗
Outlook Classic Plug in	✓	✗	✓	✗	✓	✗
Outlook Lite Plug In	✓	✓	✓	✓	✓	✗

# Security and firewall settings

Sage 200 uses a combination of Windows security and SSL certificates to secure communications between the Sage 200 server and client machines.

## Windows File Permissions

The Sage 200 client can be installed to any location on a client machine. To find the Sage 200 server, the client looks for a file called \\server name\Sage.

In the final step of installation process, the permissions of this folder share are changed as follows:

### Domain

When deployed in an Active Directory Domain environment the central Sage file share (e.g. c:\Sage) and associated files and subdirectories have their permissions set access is restricted to the Sage 200 user and admin groups.

**Note:** All domain controllers on the same domain as Sage 200 need to be accessible and writeable.

### Workgroup

When deployed in a Windows workgroup environment the central Sage file share (e.g. c:\Sage) and associated files and subdirectories have their permissions set to Everyone | FullControl. We recommend that you set the Share and Security permissions as follows:

- Set the Share permissions to **FullControl/Change/Read** for these users:
  - Sage 200 Administrators group
  - Sage 200 Users group
  - Sage 200 Services user
  - Sage 200 Secured Services user
- Set the Folder Security to **Modify/Read&Execute/ListFolderContents/Read/Write** for these users:
  - Sage 200 Administrators group
  - Sage 200 Users group
  - Sage 200 Secured Services user

**Note:** Once you have installed Sage 200, restart the machine before you access System Administration . This is so the security permissions are set correctly.

### Already have a shared Sage folder on your server?

If you already have a folder share called Sage on your server, then the permissions for this folder will be changed as part of the Sage 200 client installation. You can:

1. Change the name of the share for the existing folder.
2. Install Sage 200 to the existing folder if you're happy with permissions.

## Firewall Settings

Sage 200 runs a variety of programs and services that can be affected by security firewall settings. The following table details the ports that need to be opened in order for Sage 200 to function correctly.

Server	Port	Details
Database Server (Default SQL Instance)	TCP Port 1433	Default SQL Instance
Database Server (Named SQL instance)	UDP Port 1434	Named SQL Instance
Sage 200 File Server	TCP Port 139	File & Print Sharing
	TCP Port 445	File & Print Sharing
	TCP Port 137	File & Print Sharing
	TCP Port 138	File & Print Sharing
Sage 200 Application Server	TCP Port 10443	HTTPS
Sage 200 Self Service	TCP Port 10444	HTTPS
Sage 200 CRM Server	TCP Port 80	HTTP
	TCP Port 443*	HTTPS

You will need to open port 443 on your server machine, and grant permission for <https://licensing.services.sage.com> and [www.google.com](http://www.google.com). Google needs to be allowed as when it checks the licence, it pings Google to ensure there is an internet connection prior to going to the licensing server.

The following ports are required for Sage 200 Business Intelligence:

Server	Port	Details
Database Server (Default SQL Instance)	TCP Port 2383	SQL Analysis Services
Database Server (Named SQL Instance)*	TCP Port 2382	SQL Analysis Services
	UDP Port 1434	SQL Browser Service

\* For more information see, [http://msdn.microsoft.com/en-us/library/ms174937.aspx#bkmk\\_named](http://msdn.microsoft.com/en-us/library/ms174937.aspx#bkmk_named).

## Additional firewall settings if you have a named SOL instance or dynamic ports

Follow the steps below if you have named SOL instance or are using dynamic ports:

1. Find the port number:
  - a. Open **Start > All Programs > Microsoft SQL Server *version* > Configuration Tools > SQL Server Configuration Manager**.
  - b. Select **SQL Server Network Configuration > Protocols for <your instance Name>**.
  - c. Right-click **TCP/IP** and select **Properties**.
  - d. Select the **IP Addresses** tab and scroll down to the **IPAll** group.
  - e. The current port is the **TCP Dynamic Ports** number.
2. Set your Firewall to exclude this port number.



# Minimum specifications for client and server machines

These are the **minimum** specifications for each client and server machine in a Sage 200 Extra deployment. Users with large databases or high numbers of concurrent users will require higher specifications.

Due to the wide variation of companies that use Sage 200, it is not possible to give exact specifications for each system. Factors such as the concurrent number of users, size of the database and estimated growth should all be taken into consideration when sizing a server.

When tasks are processed, CPU and memory resources are used on both the client and the server. Therefore, the specification of both machines will affect the overall performance of the system.

For more information, see the Deployment and Installation Guide.

To make sure Sage 200 displays correctly:

- Check that your screen **Resolution** is set to the **recommended** setting for your display.  
To check this, open **Control Panel > Appearance and Personalization > Display > Screen Resolution**.
- Check that your text size is set to 100%.  
To check this, open **Control Panel > Appearance and Personalization > Display**, and ensure that the size is set to **Smaller - 100%**.

## Sage 200

	Processor	Disk	Memory	Network
<b>Sage 200 Server</b>				
Sage 200 Server with Microsoft SQL Server	Dual-core 2.6GHz or equivalent	7,200 rpm SATA with 4GB disk space after SQL Server is installed.	4GB	Gigabit Ethernet
<b>Sage 200 Client</b>				
Client	2.8GHz Pentium 4 or equivalent (e.g. Dual Core 1.6GHz)	7,200 rpm SATA with 500MB disk space required. <b>Note:</b> If you are going to run Graphical Planner you must	2GB	Gigabit Ethernet

	Processor	Disk	Memory	Network
<b>Sage 200 Server</b>		<div style="border: 1px solid gray; padding: 5px; width: fit-content;">           have a minimum of 1GB disk space.         </div>		

## Sage 200 with Sage 200 CRM

### Sage 200 and Sage 200 CRM on a single server

	Processor	Disk	Memory	Network
Sage 200 Server with Sage 200 CRM Server	Dual-core 2.6GHz or equivalent	7,200 rpm SATA with 4GB disk space after SQL Server is installed.	8GB	Gigabit Ethernet
Sage 200 Server with BI				
Sage 200 Server with Sage 200 Business Intelligence Server	Dual-core 2.6GHz or equivalent	7,200 rpm SATA with 4GB disk space after SQL Server is installed.	8GB	Gigabit Ethernet

### Sage 200 and Sage 200 CRM on separate servers

	Processor	Disk	Memory	Network
<b>Server</b>				
Sage 200 Server with Microsoft SQL Server	Dual-core 2.6GHz or equivalent	7,200 rpm SATA with 1GB disk space after SQL Server is installed.	4GB	Gigabit Ethernet
Sage 200 CRM Server	Dual-core 2.6GHz or equivalent	7,200 rpm SATA with 2GB disk space required.	4GB	Gigabit Ethernet
<b>Client</b>				
Client	2.8GHz Pentium 4 or equivalent (e.g. Dual Core 1.6GHz)	7,200 rpm SATA with 500MB disk space required. <div style="border: 1px solid gray; padding: 5px; width: fit-content; margin-top: 10px;"> <b>Note:</b> If you are going to run Graphical Planner           </div>	2GB	Gigabit Ethernet

	Processor	Disk	Memory	Network
Server		<div style="border: 1px solid gray; padding: 5px;">you must have a minimum of 1GB disk space.</div>		

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