

Sage 200 Extra

System

Requirements and

Prerequisites

2016

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# New for this version

The following changes have been made to this guide for version 2016:

## Now supported for this version

Microsoft Office 2016

Microsoft Office 365 2016

Sage Graphical Planner v12.2 (for Sage 200 Manufacturing)

## Support removed for this version

Operating systems that are no longer supported:

- Windows 8
- SBS 2011
- Citrix XenAP Server
- Server 2008 R2 is not supported for Sage 200 CRM.

SQL versions that are server no longer supported:

- 2008 R2

Browsers version that are no longer supported:

- iOS 8
- IE 10 - apart from Server 2012 only. Note: IE 10 is not supported for CRM on any operating systems.

Microsoft Office versions that are no longer supported:

- Office 2007
- Office 2010

## Additional pre-requisites for BI

If the domain controller for the BI scheduled task is on Server 2012 or 2012 R2 and the BI Admin tool is installed on Windows 7 or Server 2008 R2, you must install the following: [Microsoft KB 2830145](#).

## New installer for the Sage 200 API

The Sage 200 API is a modern REST API for application integration. This allows the development of web applications that can integrate with Sage 200 Extra. To use the new API, you must install a new API Service. See [Install Sage 200 API on an external facing web server on page 1](#).

### Clarification of server and client 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. See [Prerequisites on page 13](#).



# Introduction

This guide is designed to provide Sage 200 Business Partners and customers the system requirements for Sage 200 Extra 2016.

**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 supported specifications on page 11](#).

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.

# Supported Operating Systems

	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 2008 R2 (64-bit) (Standard & Enterprise Editions)	Windows Server 2012 (Standard, Essentials & Datacenter Editions)	Windows Server 2012 R2 (Standard, Essentials & Datacenter Editions)
<b>Sage 200 Extra</b>						
Sage 200 Server (All modules)	✗ <sup>1</sup>	✗ <sup>1</sup>	✓	✓	✓	✓ <sup>5</sup>
Sage 200 Client (All modules)	✓	✓ <sup>4</sup>	✓ <sup>4</sup>	✓	✓	✓
<b>Sage 200 CRM<sup>2</sup></b>						
Sage 200 CRM Server	✗ <sup>1</sup>	✗	✗	✗	✓	✓
Sage 200 CRM Client	✓	✓ <sup>4</sup>	✓ <sup>4</sup>	✗	✓	✓
<b>Sage 200 Business Intelligence<sup>3</sup></b>						
Sage 200 Business Intelligence Server	✗ <sup>1</sup>	✗ <sup>1</sup>	✗	✓	✓	✓
Sage 200 Business Intelligence Client (including Sage 200 BI Admin Tool)	✓	✓ <sup>4</sup>	✓ <sup>4</sup>	✓	✓	✓
<b>Sage 200 Migration Tool</b>						
Sage 200 Migration Tool	32-bit	✗	✗	✗	✗	✗
Sage 50 to Sage 200 Data Migration Tool	✓	✓	✓	✗	✗	✗

## Notes:

Additional configuration may be required depending on your operating system. Please see the sections relevant to the server operating system you are installing on.

We recommend that you install the latest service packs and Windows Updates for both your client and server operating system and database management system.

All modules in the Sage 200 Suite are 32-bit applications. Where supported on 64-bit platforms, the system runs in WOW64 emulation mode.

The Sage 200 suite does not support Itanium chipsets.

<sup>1</sup> Operating System not supported for production environments but may be used for demonstration and training purposes only.

<sup>2</sup> Sage 200 CRM is **not** supported when it is installed more than once on the same server.

<sup>3</sup> Sage 200 Business Intelligence is not supported on Workgroup editions of SQL server, as BI requires SQL Analysis Services.

<sup>4</sup> Sage 200 is not supported on Windows RT. The Sage 200 desktop is not optimised for touch screen devices.

<sup>5</sup> Sage 200 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.

# Installing Sage 200 using Terminal Services

Sage 200 Extra is designed around a 'rich-client' architecture that is best suited to deployment over a local area network. It is supported in a Microsoft Terminal Services and Microsoft Remote Desktop Services environment with the following considerations:

- As Sage 200 is best suited to deployment on a local area network, where possible, we recommend that you run large batch processes, such as **Update Waiting Postings**, on a high specification client joined to the local area network.  
If the entire solution is hosted remotely, large batch process tasks should be run 'out of hours' when more bandwidth and server resources are available. Alternatively, you may want to consider deploying Sage 200 Extra Online.
- For Terminal servers, Remote Desktop Services servers hosting Sage 200 client sessions, you must allow:
  - At least 600MB memory per user on the Terminal 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.
  - For Windows Server 2012 or 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.
    - with Windows Server 2012 or 2012 R2 you must enable the .NET 3.5 and **.NET Extensibility 3.5** features in IIS.

For more on setting up the Task Launcher Service, see the Deployment and Installation Guide.

# Supported Versions of Terminal Services and Remote Desktop

	Windows Remote Desktop Server 2008 R2 published via Remote Desktop Services	Windows Server 2012 & 2012 R2 Published via Remote Desktop Services
<b>Sage 200 Extra</b>		
Sage 200 Server (All modules)	✓	✓ <sup>1</sup>
Sage 200 Client (All modules)	✓	✓ <sup>1</sup>
<b>Sage 200 CRM</b>		
Sage 200 CRM Server	✓	✓ <sup>1</sup>
Sage 200 CRM Client	✓	✓ <sup>1</sup>
<b>Sage 200 BI</b>		
Sage 200 BI Server	✓	✓ <sup>1</sup>
Sage 200 BI Client (including Sage 200 BI Admin Tool)	✓	✓ <sup>1</sup>
Sage 200 BI Excel Client	✓	✓ <sup>1</sup>
<b>Sage 200 Migration Tool</b>		
Sage 200 Migration Tool	✗	✗

<sup>1</sup> For Windows Server 2012 and 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.

# Installation options for virtualised platforms

Due to the large number of virtualisation platforms it is not practical or feasible for Sage to test them all. If you encounter issues while running client software in a client hosted virtualised environment, you may be required to reproduce the issues in a standard (non-virtualised) environment. Refer to the Products and Services Terms and Conditions here: <http://www.sage.co.uk/legal/terms-conditions/product-services-terms.html>.

## Server hosted virtualisation

All elements of Sage 200 Extra are supported in a virtualised environment if the following conditions are met:

- The underlying virtualisation platform has been accredited by the Microsoft Windows Server Virtualisation Program. See <http://www.windowsservercatalog.com/svvp.aspx> for further details.
- The host operating system is one of the supported operating systems outlined in the system requirements. See [Supported operating systems on page 2](#).

Sage 200 is also supported when running in a Microsoft Hyper-V virtualised environment which is running one of the supported operating systems outlined in the System Requirements.

You must ensure that the server hosting the virtual machines is of sufficient specification to run both the underlying operating system, and the virtual machine that Sage 200 is running on.

## Client hosted virtualisation

Sage 200 clients are supported when running in a client hosted virtualised environment, provided that the virtualised environment is running a supported version of Windows. For example:

- Sage 200 Client running in a Windows 7 VM hosted on Mac OS.
- Sage 200 Client running in a Windows 8.1 VM hosted on Linux.

## Hosting

Sage 200 Extra is only supported in a hosted environment where the entire solution is hosted and users connect to the system via a Microsoft Terminal Services or Remote Desktop Services.

Sites considering a hosted solution may wish to consider Sage 200 Extra Online as an alternative method of deployment.

# Microsoft SQL Server

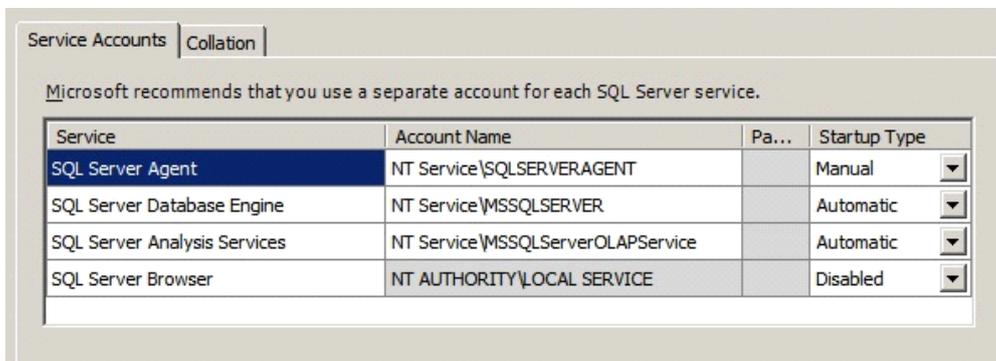
## Supported versions of SQL server

Microsoft SQL Server 2012 SP2 - Standard, Enterprise & Datacenter Editions (32 & 64 bit ).  
(SQL 2012 Business Intelligence Edition is not supported)

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

**Note:**

We recommend that you install Microsoft SQL Server 2012 and 2014 using the default accounts set up by the SQL Server installation wizard as shown below:



**?** How many licensed seats for SQL server do I need?

The same number as the maximum number of concurrent Sage 200 users you're likely to have.

## Prerequisites for Business Intelligence

**Note:** Sage 200 Business Intelligence 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.
- SQL Server must be configured to use the following collation: Latin1\_General\_CI\_AS
- SQL Server must be running in Mixed Mode (SQL Server and Windows Authentication).

# Other supported components

## Supported Editions of Microsoft Office

Microsoft Office 2013 SP1 (32-bit and 64-bit) – Standard, Home and Business, Small Business Premium, Professional Plus, and Enterprise Editions

Microsoft Office 2016 (32-bit and 64-bit) – Standard, Home and Business, Small Business Premium, Professional Plus, and Enterprise Editions

Microsoft Office 365 (32-bit and 64-bit) – Small Business Premium, Professional Plus and Enterprise Editions

**Note:** Microsoft Office 365 Home and Personal editions are not supported.

The following table explains how Sage 200 functionality integrates with Microsoft Office:

	2013 SP1		2016		Office 365 2016	
	32-bit	64-bit	32 bit	64 bit	Desktop Apps	Online
<b>Sage 200 App</b>						
Excel Integration	✓	✗	✓	✗	✗	✗
Excel Reporting (new)	✓	✓	✓	✓	✓	✗
Send to Excel (from workspaces and lists)	✓	✓	✓	✓	✓	✓
Opening Attachments	✓	✓	✓	✓	✓	✗
Send Email (not from Report Designer)	✓	✗	✓	✗	✓	✗
Report Designer - output to email	✓	✗	✓	✗	✓	✗
<b>Sage 200 Business Intelligence</b>						
	✓	✗	✓	✗	✗	✗
<b>Sage 200 CRM</b>						
Mail merge	✓	✓	✓	✓	✓	✗

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

For additional guidance on integrating CRM with Office 365 and Microsoft Exchange, please refer to the CRM Community: <https://community.sagecrm.com>.

## Supported Editions of Sage Payroll

Sage Payroll v22 - Standard, Professional, and Bureau Editions.

## Browser and Mobile device Support

### Browser based access via the Sage 200 Desktop App

Sage 200 includes dynamic summary pages and customisable workspaces which can be accessed in the Sage 200 Desktop App. In order to run these you need to have:

Microsoft Internet Explorer v11 or Edge on x86 and x64 based PCs

### Sage 200 Self Service via a web browser

Sage 200 includes dynamic summary pages and customisable workspaces, which can be accessed via a web browser. These have been tested on the following devices and browsers.

Safari on Apple iPad running iOS v9

Google Chrome on x86 and x64 based PCs and 10", 7" and 6" Android devices.

Microsoft Internet Explorer v11 or Edge on:

- x86 and x64 based PCs.
- Microsoft Windows 8.1 tablets running Windows 8 Professional and Enterprise Editions

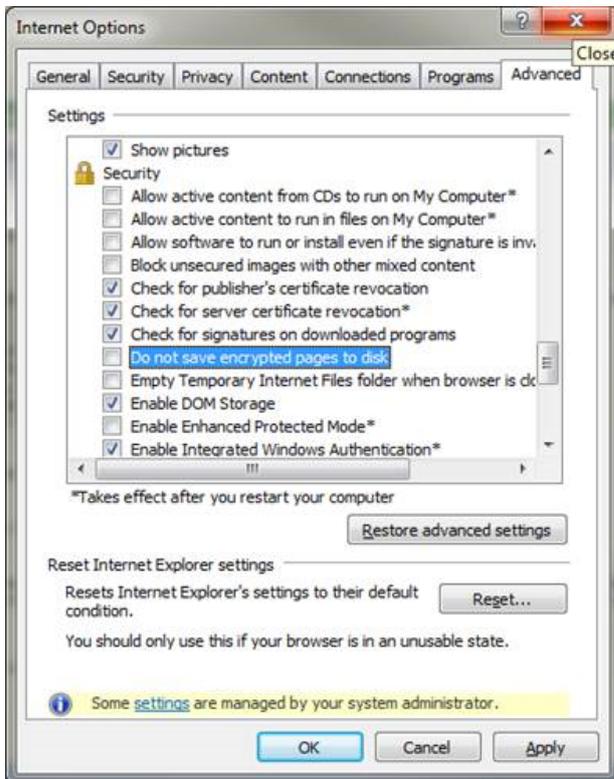
**Note:** Other devices and browsers may be compatible but have not been tested.

## Browser settings

When accessing Sage 200 workspaces in the desktop app or from the Self Service website, you may be asked to login. If you don't wish to be prompted each time, you can set your browser to always use your login credentials:

Browser	Settings
Internet Explorer	<p>We recommend that you set this for your local intranet zone, however you may choose to set Trusted Sites instead depending on your domain or local security policies.</p> <ul style="list-style-type: none"> <li>■ Local Intranet zone           <ol style="list-style-type: none"> <li>a. Open: <b>Internet Options &gt; Security&gt; Custom Level</b></li> <li>b. Set user <b>User Authentication &gt; Logon to Automatic Logon with current user name and password.</b></li> </ol> </li> <li>■ Trusted Sites           <ol style="list-style-type: none"> <li>a. Open <b>Internet Options &gt; Security &gt; Trusted Sites &gt; Sites.</b></li> <li>b. Add the SelfService server URL e.g. <b>https://&lt;server_name&gt;.</b></li> <li>c. Open <b>Internet Options &gt; Security &gt; Trusted Sites &gt; Custom Level.</b></li> <li>d. Set <b>User Authentication &gt; Logon to Automatic Logon with current user name and password.</b></li> </ol> </li> </ul>
Chrome - Self Service website only	<p>Set <b>User Authentication &gt; Logon to Automatic Logon with current user name and password.</b></p> <p>Enter the following from the Command prompt:</p> <ul style="list-style-type: none"> <li>■ For 32-bit operating systems:           <pre>"C:\Program Files\Google\Chrome\Application\chrome.exe" -auth-server-whitelist="localhost, &lt;machine fully qualified domain name&gt;". For example: "C:\Program Files\Google\Chrome\Application\chrome.exe" -auth-server-whitelist=localhost, sagesvr01.mydomain.com"</pre> </li> <li>■ For 64-bit operating systems:           <pre>"C:\Program Files (x86)\Google\Chrome\Application\chrome.exe" -auth-server-whitelist="localhost, &lt;machine fully qualified domain name&gt;". For example: "C:\Program Files (x86)\Google\Chrome\Application\chrome.exe" -auth-server-whitelist=localhost, sagesvr01.mydomain.com"</pre> </li> </ul>

When viewing excel reports in Internet Explorer, you may see this error '**Unable to download viewreport from [server name]**'. To resolve this make sure that you have **not** set the option **Do not save encrypted pages to disk** in the Internet Explorer settings.



## Sage 200 CRM

Internet Explorer v11.
Chrome (32-bit only)
Safari on Apple iPad running iOS v9

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

# Minimum supported specifications

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 Extra installed on a single server

	Processor	Disk	Memory	Network
Sage 200 Server				
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
Sage 200 Server with CRM				
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

	Processor	Disk	Memory	Network
Sage 200 Client				
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 have a minimum of 1GB disk space.	2GB	Gigabit Ethernet

### Sage 200 Extra with Sage 200 CRM on a separate server

	Processor	Disk	Memory	Network
Server				
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
Sage 200 Client				
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 have a minimum of 1GB disk space.	2GB	Gigabit Ethernet

# 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.

## Pre-requisites

- 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>
- 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**.
- Machines running Sage 200 must have a c:\ drive although Sage 200 can be installed and run from a drive other than c:\.
- Your domain controller must **not** be set to **Read Only**.
- Microsoft DotNet Framework versions installed (all server and client machines) :
  - v3.5 Service Pack 1.
  - v4.5.1
- Windows Identity Foundation [Microsoft KB 974405](#) (all server machines):
  - For Windows Server 2012 and 2012 R2, this can be added as a feature.
  - For Windows Server 2008 R2, this is included with the Sage 200 2016 download.
- Microsoft Internet Information Services (IIS) v7.5 or greater.
  - IIS v7.5 must have the following hotfix applied [KB980368](#)

### Note:

The following components are installed automatically if they are not found on your system:

- Microsoft Windows Installer v3.1
- Microsoft Management Console v3.0

## Required settings for IIS

	<b>IIS v7.5</b>	<b>IIS v8 and 8.5</b>
<b>Common HTTP Features</b>	Default Document	Default Document
	Directory Browsing	Directory Browsing
	HTTP Errors	HTTP Errors
	HTTP Redirection	HTTP Redirection
	Static Content	Static Content
<b>Application Development</b>	.Net Extensibility	.Net Extensibility 3.5 .Net Extensibility 4.5
	ASP	ASP
	ASP.NET	ASP.NET ASP.NET 3.5 ASP.NET 4.5
	ISAPI Extensions	ISAPI Extensions
	ISAPI Filters	ISAPI Filters
<b>Security</b>	Request Filtering	Request Filtering
	Windows Authentication	Windows Authentication
<b>Management Tools</b>	IIS Management Console	IIS Management Console
<b>Management Tools &gt; IIS 6 Management Compatibility</b>	IIS 6 WMI Compatibility	IIS 6 WMI Compatibility
	IIS Metabase and IIS 6 configuration compatibility	IIS 6 Metabase compatibility
<b>.Net Framework 4.5 Features</b>		WCF Services
		HTTP Activation

# General considerations

Before you install Sage 200, you must also consider the following:

- If you are upgrading, you must uninstall your previous version of Sage 200.  
For more information, see the Sage 200 Deployment and Installation Guide.
- Sage 200 is designed to run in a domain based network environment. The only scenario where Sage is supported in a workgroup network environment is where all elements of Sage 200 are installed on a single server and accessed by clients on the local area network.
- By default, the **Sage 200 Self Service** web site is only accessible from your internal network. This is because the SSL certificates used to secure these sites are based on the machine name and are not accessible externally. Additional configuration is required to make the site accessible externally.  
For more information, see the Deployment and Installation Guide.
- **Sage 200 CRM** is installed to the default website. This is not configurable. By default, the website is published using **http** and this is not a secure connection. Additional configuration is required to use CRM over a secure external connection. Please see the [Sage CRM Community](#) website for more information.

