



EVENT 1 SOFTWARE



for Meridian Prolog Manager
and Sage 300 Construction and Real Estate

INSTALLATION GUIDE

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Overview

There are 3 phases to optimum Integrator functionality: Preparation, Installation, and Implementation.

Event 1 Software provides services personnel to guide you through the initial installation process of Event 1 Integrator. There is certain information you must have available for this to be successful and there are also certain tasks that you should perform in advance.

The purpose of this document is to provide all of the information you will need in order to be prepared to engage a services representative on the day you will be installing Integrator. Please read this document, ask any questions you may have, and identify any items that could delay or prevent the installation.

Preparation

There are certain requirements for Integrator to be installed correctly. Failure to ensure that these prerequisites are in place can result in the need to reschedule or increase the time needed to complete the installation.

Installation

An Event 1 Software Technical Support Representative (E1TSR) will meet with you online to ensure that Integrator is properly downloaded, installed and licensed.

*****NOTE: At time of installation, no other Event 1 application can be in use. (i.e. Office Connector, Liberty Reports) as these share files with Integrator.***

Implementation

A subject matter expert will meet with you online to guide you through the process of choosing the settings in Integrator. This essential phase defines how Integrator will synchronize data between Sage 300 Construction and Real Estate (formerly Sage Timberline) and Meridian Prolog Manager.

No implementation meetings will be scheduled until proper installation of Integrator has been verified online by a member of Event 1 Software's services team.

Preparation

- Server vs. Workstation
- Passwords
- Local Folder Permissions
- Required Software Applications
- System Requirements
- (Optional) Create Copies of your Sage 300 CRE and Meridian Prolog Databases

Server vs. Workstation Install

A question that is commonly asked is whether Integrator needs to be installed on the server. **It does not.** It may be installed on as many workstations as needed, on a terminal server or Citrix server. You may wish to install it on a server only for the purpose of facilitating unattended/scheduled operation because a server will be running at all times and would accommodate a scheduled run off-hours. For that purpose, the target environment does not need to be a server but simply a computer that will be left on so that the scheduled task can run.

What You Will Need

The following information is needed to proceed with installation. When working with your services representative, the absence of any of this information (or permissions) may result in a delay of your installation or additional time needing to be spent.

Passwords

Windows/Network User name and Password

The account that you use must have permissions to access each of the software applications (Sage 300 CRE and Prolog Manager) and any folders or files that those applications require access to according to their respective documented requirements.

Sage 300 CRE User name and Password

It is recommended that you use an application administrator account during installation and implementation. A non-administrator account can be used if granted the following minimum set of permissions however specific workflow tasks associated with data being exchanged may be necessary beyond this list depending on your specific workflow:

- Common Tasks – Tools – Macros ¹
- Common Tasks – Tools – File Tools
- Accounts Payable – Tasks – Enter Invoices ⁷
- Job Cost – Tasks – Post Entries ²
- Job Cost – Setup – Extras ³
- Job Cost – Setup – Cost Codes ³
- Job Cost – Setup – Categories ³
- Job Cost – Tools – Import – Commitments
- Job Cost – Tools – Import – Estimates ⁶
- ODBC – Read Access – AP Master files
- ODBC – Read Access – BL WIP files ⁴
- ODBC – Read Access – JC Master files
- ODBC – Read Access – JC Transaction files
- ODBC – Write Access – AP Master files ⁵
- ODBC – Write Access – AP Invoice file (New) ⁷
- ODBC – Write Access – JC Master files

- 1 Required if intending to automate functions that send Contracts and Subcontract Cos from Prolog Manager to Sage 300 CRE such that files will not need to be manually imported
- 2 Required if you intend to include posting of committed cost entries associated with Contracts and Subcontract Cos as part of a macro.
- 3 Required if entries sent to Sage 300 CRE will result in the creation of new records.
- 4 Required only if you intend to use Billing WIP records as the source of cost information flowing into Prolog Manager
- 5 Required if you intend to allow Integrator to create or update AP Vendor records based on changes to Company records made in Prolog Manager
- 6 Required if estimates are being conveyed from Prolog to Sage 300 CRE Job Cost
- 7 Required if General Invoices or Contract Invoices will be entered in Prolog and conveyed to Sage 300 CRE Accounts Payable

SQL Server User name and Password

It is recommended that you use the built-in **sa** account (system administrator) or an account with system administrator rights during installation. As part of the initial setup of Integrator, an account named SDKUser will automatically be created and configured for you with the required permissions. Once this has been accomplished, you may use a non-administrator account so long as it is granted the following permissions at a minimum:

- Access to database named Integrator with the following role members:
 - `_db_datareader`
 - `_db_datawriter`
 - `_db_ddladmin`
- Access to each Prolog Manager database you will be integrating with the following role members:
 - `_db_datareader`
 - `_db_datawriter`
 - `_db_ddladmin`

Prolog Manager Serial Number

You will need this information in order to download and install the Meridian AI-SDK (a required component identified later in this document).

Prolog Manager User name and Password

For configuration and testing purposes, you should have available login credentials for Prolog Manager that provides administrator privileges.

Local Folder Permissions

- Windows XP and Windows Server 2003

Folder	Full Control	Modify	Read & Execute	List Folder Contents	Read	Write
<ul style="list-style-type: none"> Documents and Settings <ul style="list-style-type: none"> All Users <ul style="list-style-type: none"> Application Data Event 1 	✓	✓	✓	✓	✓	✓
<ul style="list-style-type: none"> Documents and Settings <ul style="list-style-type: none"> username <ul style="list-style-type: none"> Application Data Event 1 	✓	✓	✓	✓	✓	✓
<ul style="list-style-type: none"> Program Files <ul style="list-style-type: none"> Event 1 			✓	✓	✓	
<ul style="list-style-type: none"> Windows <ul style="list-style-type: none"> System32 			✓	✓	✓	

- 32-Bit Windows Vista, Windows 7, and Server 2008

Folder	Full Control	Modify	Read & Execute	List Folder Contents	Read	Write
<ul style="list-style-type: none"> ProgramData <ul style="list-style-type: none"> Event 1 	✓	✓	✓	✓	✓	✓
<ul style="list-style-type: none"> Users <ul style="list-style-type: none"> username <ul style="list-style-type: none"> AppData <ul style="list-style-type: none"> Local Event 1 	✓	✓	✓	✓	✓	✓
<ul style="list-style-type: none"> Users <ul style="list-style-type: none"> username <ul style="list-style-type: none"> AppData <ul style="list-style-type: none"> Roaming Event 1 	✓	✓	✓	✓	✓	✓
<ul style="list-style-type: none"> Program Files <ul style="list-style-type: none"> Event 1 			✓	✓	✓	
<ul style="list-style-type: none"> Windows <ul style="list-style-type: none"> System32 			✓	✓	✓	

- 64-Bit Windows Vista, Windows 7, and Server 2008

Folder	Full Control	Modify	Read & Execute	List Folder Contents	Read	Write
<ul style="list-style-type: none"> ProgramData <ul style="list-style-type: none"> Event 1 	<input checked="" type="checkbox"/>					
<ul style="list-style-type: none"> Users <ul style="list-style-type: none"> <i>username</i> <ul style="list-style-type: none"> AppData <ul style="list-style-type: none"> Local <ul style="list-style-type: none"> Event 1 	<input checked="" type="checkbox"/>					
<ul style="list-style-type: none"> Users <ul style="list-style-type: none"> <i>username</i> <ul style="list-style-type: none"> AppData <ul style="list-style-type: none"> Roaming <ul style="list-style-type: none"> Event 1 	<input checked="" type="checkbox"/>					
<ul style="list-style-type: none"> Program Files (x86) <ul style="list-style-type: none"> Event 1 			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<ul style="list-style-type: none"> Windows <ul style="list-style-type: none"> System32 			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Required Software Applications

The following applications are expected to be installed prior to the engagement of a services representative to assist you with installation. Failure to have these applications installed in advance can result in the need to reschedule your installation or increased time needed to complete the installation.

Any computer on which Integrator is installed must have the following applications installed:

- **Sage 300 Construction and Real Estate - *REQUIRED***

This must include, at minimum: Accounts Payable, Job Cost, and ODBC.

- **Meridian AI-SDK - *REQUIRED***
(Application Integration – Software Developer Kit)

This component is available at no charge to you from Meridian Systems via your SupportLink login. If using versions of Prolog Manager older than Prolog 2008 R1, you must install the version of the AI-SDK that matches your version of Prolog. For all other versions of Prolog, including the most current, use the AI-SDK for Prolog 2008 R1. The following page on the Meridian website can be used to download this component:

<http://support.meridiansystems.com/login.aspx>

You can confirm whether this component is installed in the Add or Remove Programs window. It will be displayed as “Application Integration SDK”.

- **SQL-DMO - *REQUIRED***
(SQL Data Management Objects)

This can be accomplished by installing one of the following:

- Prolog Manager
- Prolog Administrator
- SQL Client Tools (from your SQL Server installation CD)
- SQL 2005 Backward Compatibility Components
(download from msdn.microsoft.com)

- **Meridian Prolog Manager - *OPTIONAL***

It is not required to have this software installed on a computer that will run Integrator. The presence of Prolog Manager may however be beneficial for configuration and workflow purposes.

System Requirements

Check the Event 1 Software website to obtain the currently supported versions of operating systems and related software:

- Windows
- Sage 300 Construction and Real Estate
- Meridian Prolog Manager
- Microsoft SQL Server

Refer to the following page for currently supported versions:

<http://www.event1software.com/product/integrator/>

Optional Preparation

Create Copies of your Sage 300 CRE and Meridian Prolog Databases

To complete the installation phase, a test connection to your data will need to be made in Integrator. Some customers prefer to make copies of their databases for testing purposes. For further information on copying your databases, see the Installation section, below.

Installation

Once you have completed the preparation phase, please contact Event 1 Software at 360-567-3752 or via email to support@event1software.com to schedule an installation meeting with an Event 1 Software services representative. During the meeting the Event 1 Software services representative will assist you with downloading, installing, licensing and creating a test connection. The installation meeting will be scheduled for 60 minutes, but usually doesn't take that long. Here is what you can expect:

- Confirm prerequisite software is installed.
- Download Integrator software
- Establish the Event 1 System Folder
- Complete licensing steps
- Create a test connection between your Prolog Manager and Sage 300 Construction and Real Estate databases

Download

The first step towards installing Integrator is to download it from the Event1 software website. The download link will be provided at the time of your installation session. What you will be downloading is a self extracting compressed file containing the installation files. This file, when double clicked, will extract the installation files to C:\Event 1, unless you choose a different location. It will create the C:\Event 1 folder and subfolders it needs. Once the installation files have been extracted, the installation wizard will begin.

Event 1 System Folder

During the installation process, it will be necessary to specify the location of your Event 1 System folder, which is where your licenses are stored. Usually this is designated as a shared network location, such as T:\Event1, so that if there are other computers where the software is to be installed, they can all use the same license files. Alternatively, you can select the standalone option to store the licenses on the machine where you're performing the installation.

Licensing

Once Integrator has been installed, your licenses will need to be updated. This is a matter of launching Integrator, opening the licensing wizard, entering your company name and license ID, then updating your licenses using the online licensing feature.

Create a Test Connection

Simply put, in order for Integrator to synchronize information between Sage 300 CRE and Prolog Manager, it not only needs to know where these databases are, it also needs the ability to access them. This includes the SQL server where Prolog data is typically stored.

During your installation meeting, the Event 1 Software services representative will create a test connection with you using the new connection wizard in Integrator. This is important because the inability to do so often indicates that one or more of the prerequisites are not in place.

You may wish to (or need to) create additional connections if there is more than one Prolog Manager or Sage 300 CRE database being integrated.

To create a connection, click the **File** menu and click **New Connection**. Documentation about the steps of creating a connection can be found at:

http://www.event1software.com/products/integrator/help/tools_filenewconnection.htm

Note - The first time a connection is created, Integrator will notify you that the Integrator database does not exist on the server yet and confirm that you wish to create it. Click Yes to proceed. This database will reside on the same server as your Prolog Manager database and will contain all of the configuration choices you make during your implementation process.

Note – some customers prefer to create copies of their Sage 300 CRE and Meridian Prolog Manager data to use for the test connection. Contacting your Sage 300 CRE and / or your Meridian Prolog Manager support representative or consultant for assistance is recommended.

Sage 300 CRE

Use the File Tools application within Sage Desktop. This is found in the Tasks list under Sage 300 CRE – Common Tasks – Tools – File Tools. Use the Copy option to create a copy of all (or selected) data files in a separate folder.

Once the copy has been created, confirm that you can access the copied data folder when you open a Sage 300 CRE application.

For clarity, we recommend that you go to File – Company Settings and change the name of the company in the copied data. This will make it clear to other users that this is not your live database.

Meridian Prolog Manager

Use the Backup Database and Restore Database options within Prolog Administrator, which can be found under the Database menu. Alternatively, you can use the Backup and Restore tasks within SQL Management Studio.

Once the copy has been created, confirm that you can access the copied database when you open Prolog Manager. You will need to create a new connection profile by clicking the Setup button in the Open Database – Logon window.

Assuming that the test connections has been successfully created and can connect to the respective databases, the installation is complete and you are ready for your first implementation session with a consultant!