Sage 300 People Mobile

Mobile application installation and configuration notes.

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1.0 Introduction

1.1 Functionality

The Sage Self Service application allows employees of companies, who have implemented the Sage 300 People Public API to manage their Leave, download Payslips and view their Personal Details loaded in the Sage 300 People Payroll system.

1.2 System Requirements

| Hardware requirements	Minimum	Recommended
Processor	Quad Core Server CPU	Quad Core Dual CPU or Higher
Memory	8GB (Dedicated)	16GB (Dedicated) or Higher
Free Hard Drive Space	40 GB	80GB or higher
CD / DVD / USB 2.0	✓	✓
Network Card	100Mb	1Gb or higher
Supported Operating Systems		
	Windows Server 2008 R2 with Service Pack 1	Windows Server 2012 R2 (X64) With latest Service Packs (Dedicated Application Server) With IIS 8.0 enabled
Database Software	Microsoft SQL Server 2008 R2 Std or Higher (Licensed)	Microsoft SQL Server 2012 Std or Higher (Licensed)
Security (SSL)		SSL Certificate imported in Personal Certificate Store on Sage 300 People Server
Web Browser	Internet Explorer 10	Internet Explorer IE11 +
Additional Browsers		Chrome / Mozilla Firefox / Safari / Microsoft Edge
Screen Resolution	1280 x 1024	
Supporting Software		Microsoft .net Framework 3.5 SP1 Microsoft .net Framework 4.0 Microsoft .net Framework 4.5 Microsoft .net Framework 4.5.1

2.0 Setup

Server and Network configuration

2.1 Server Installation

The Sage Self Service application requires that the Sage 300 Web Self Service application to be already installed and published to the general internet. Please refer to the installation guide for Sage 300 People if not yet implemented.

On a server which already has Sage 300 Web Self Service installed run the Sage 300 People installer and follow the below steps:
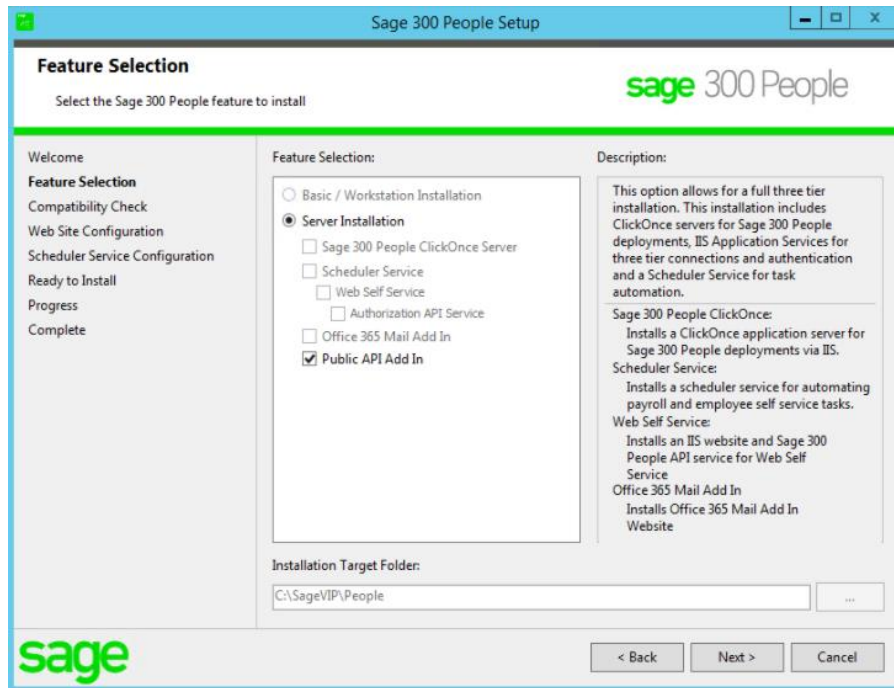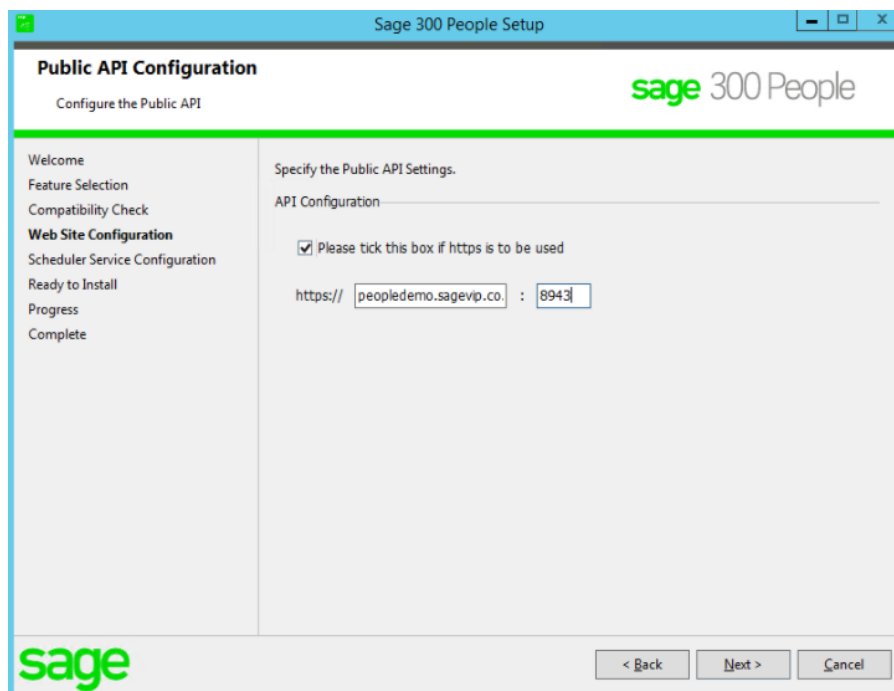
An Installer Extraction progress bar will briefly be displayed:
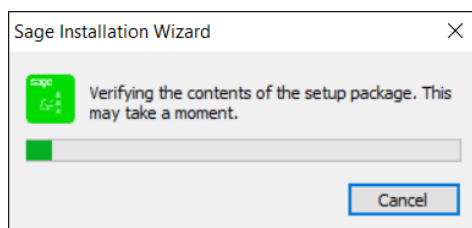
The Installation screen (which will be the default Landing page and the Installer Main screen) will be displayed:
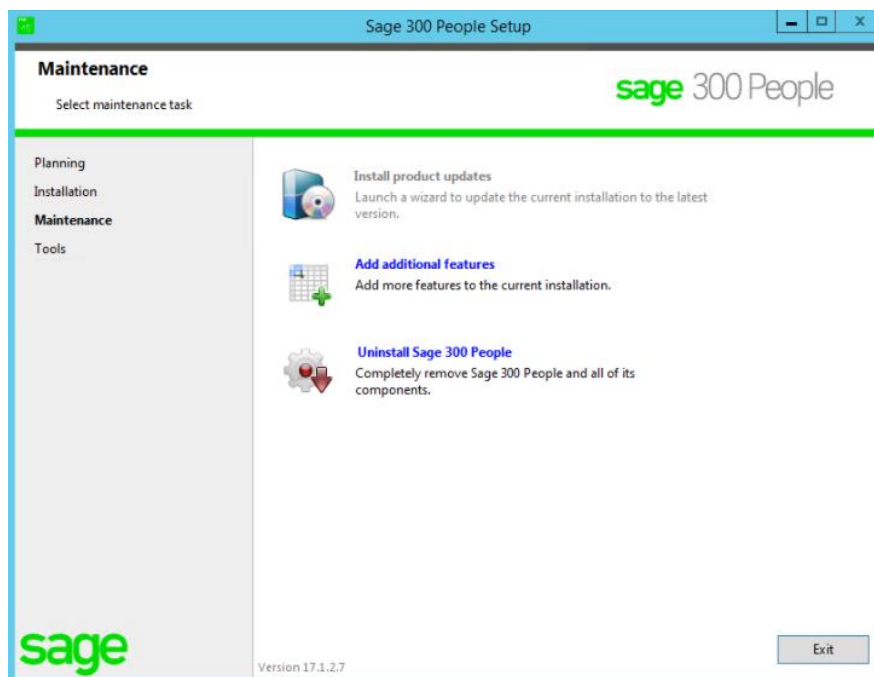
Click on Add additional features

Select Public API Add In and click <u>Next</u>

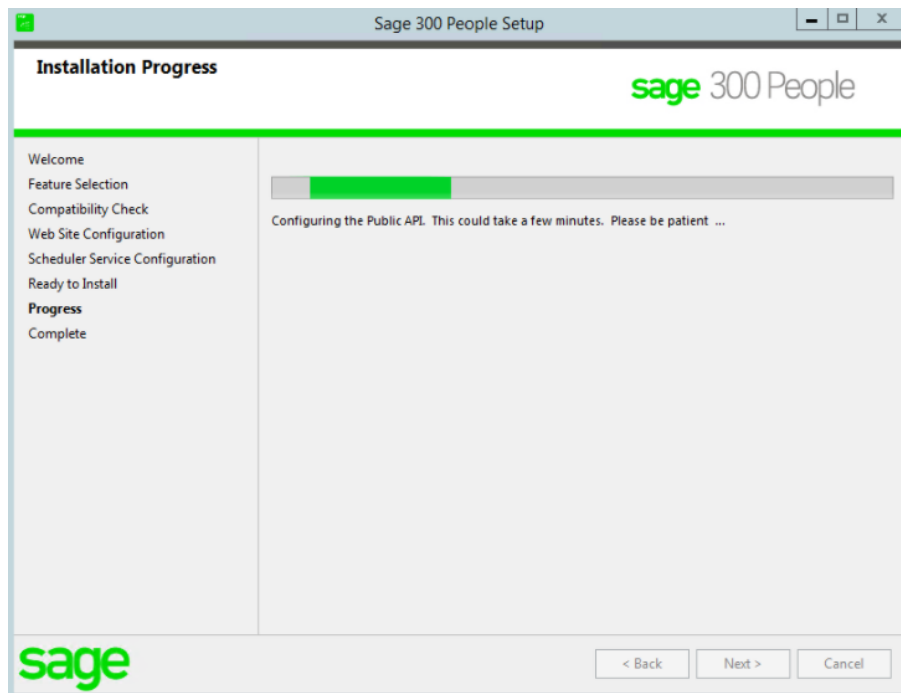
The Public API Configuration Screen will be displayed

Enter your public Server name and Port of your liking. The default port used is 8943.

Even though the installer will allow you to make use of HTTP, we recommend clients to use HTTPS and bind the API to an SSL certificate.
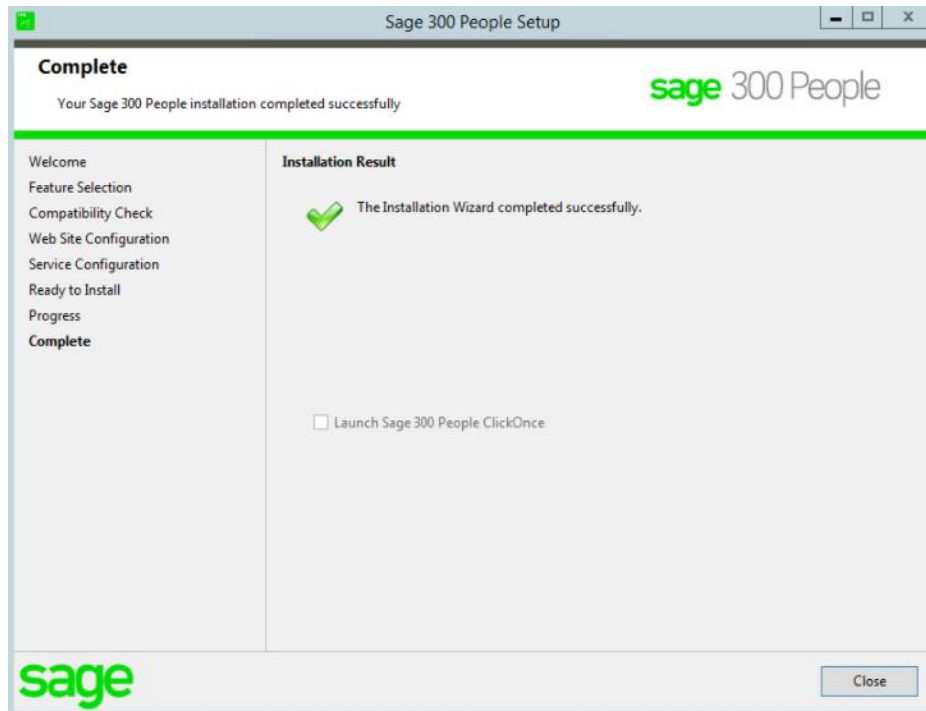
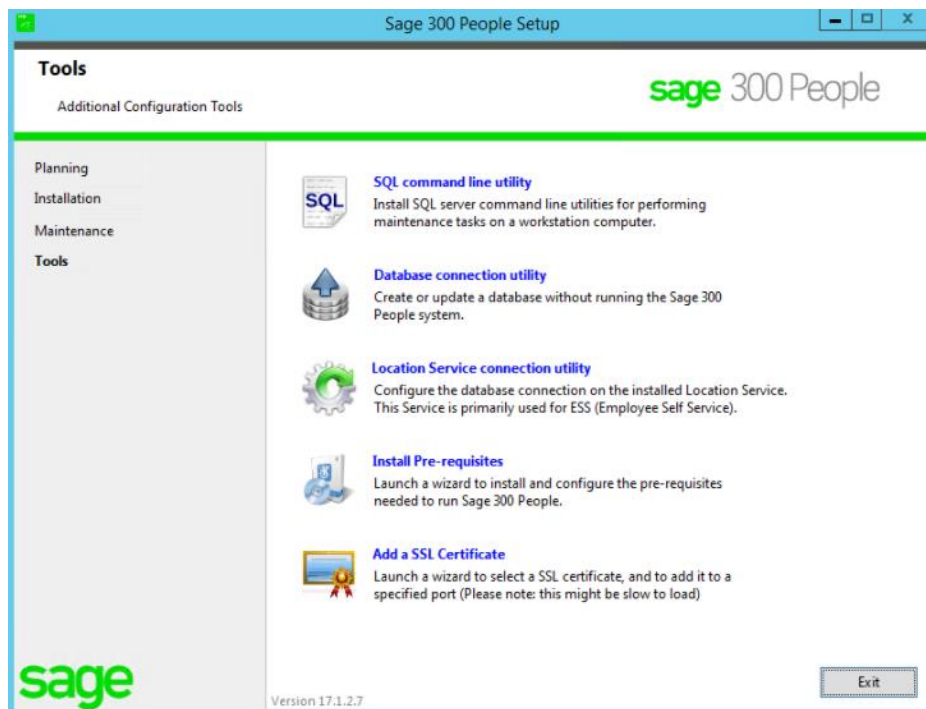Complete the required values and select Next and Install
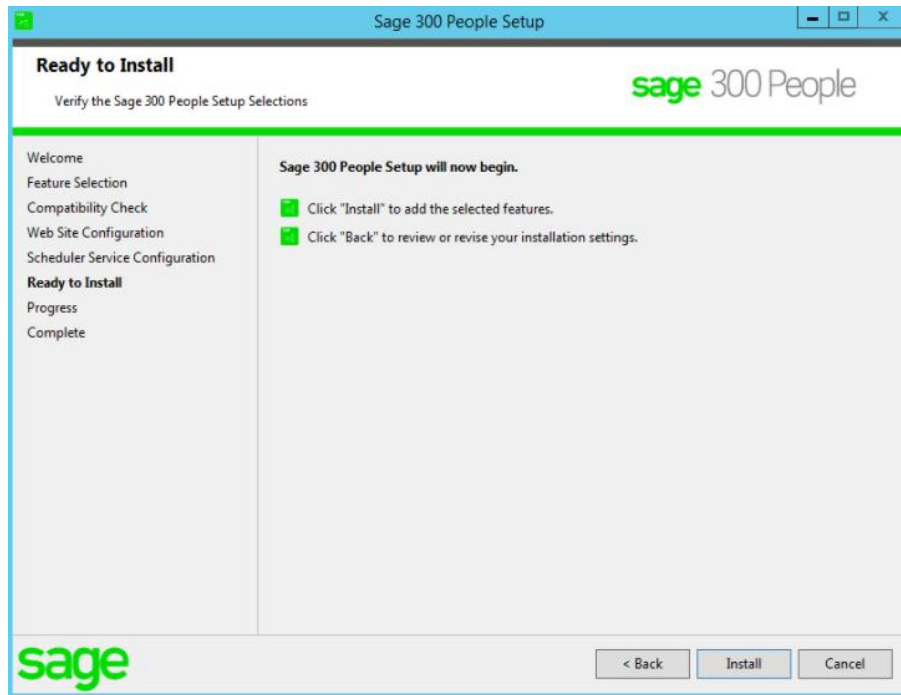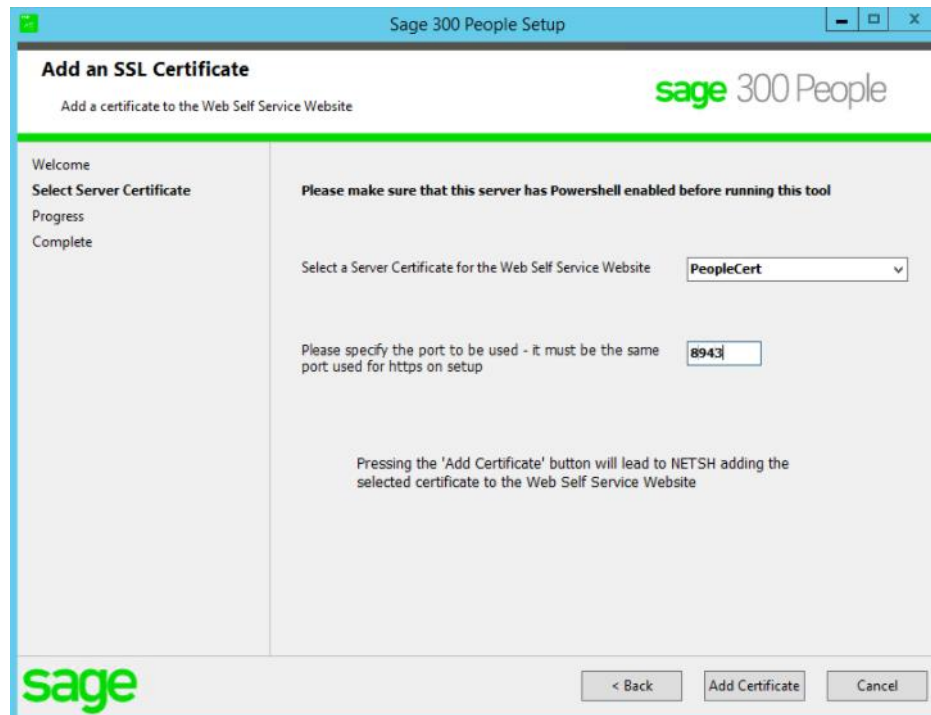

The public API will now be installed

Once the installation is complete click Close
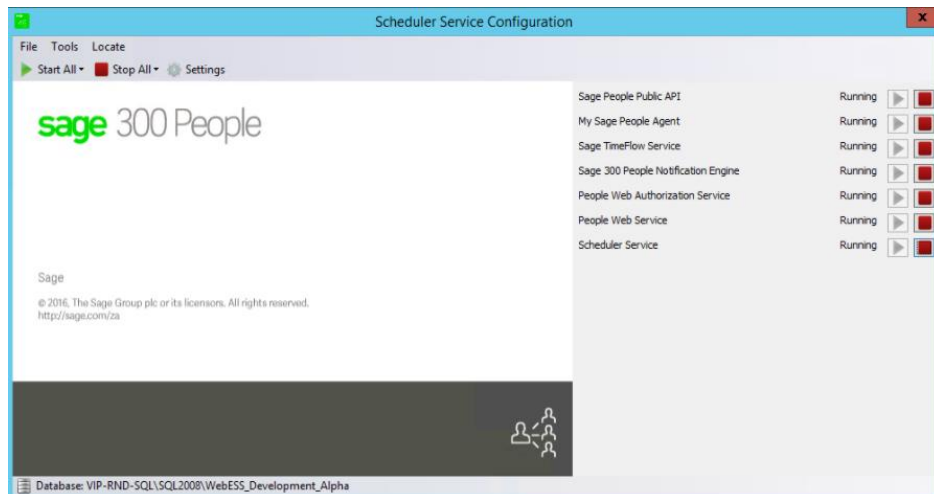

Click Tools and click Add a SSL Certificate

Select your SSL Certificate loaded in the Certificate store in IIS and specify the specified port during installation

Select Add Certificate and click Close and Exit the Installer
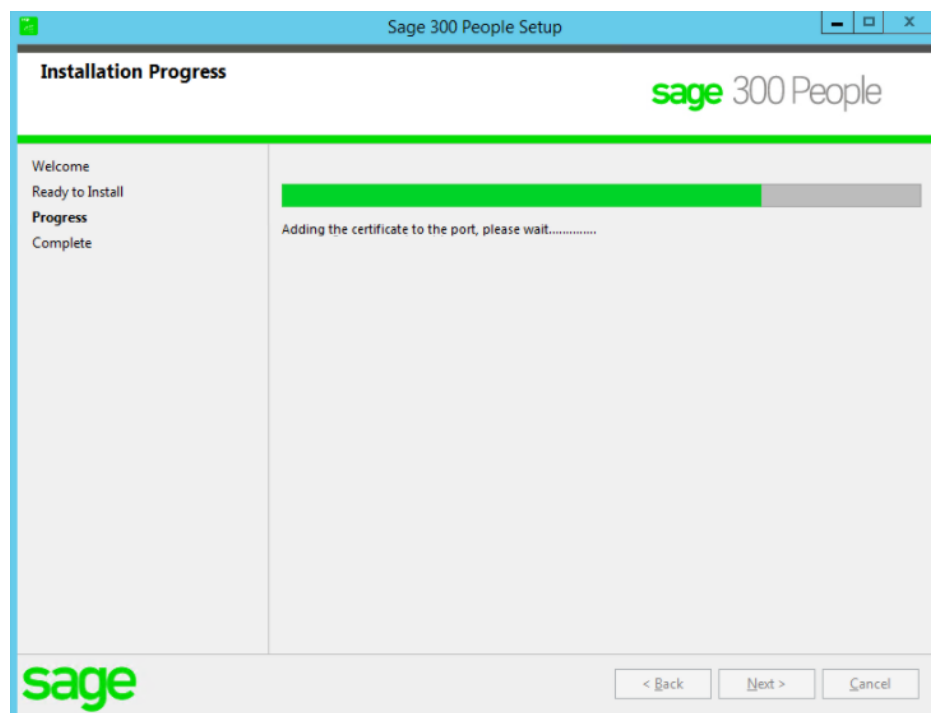
Open the Scheduler Service Configuration Tool and confirm that the Sage People Public API is Running

2.2 Network Configuration

As the Sage 300 Public API uses its own Port number for all mobile traffic your IT Network Administrator is required to open the port selected during installation to the general Internet for the Host Name defined. To ensure that this has been completed correctly you should be able to Telnet to the server on the port defined.

Alternatively, you can also use a Port Testing Application on your mobile device to test if communication is open on the port to the Host.
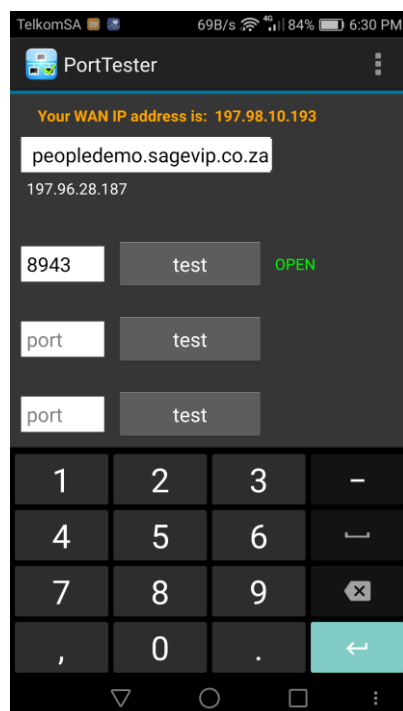
Please note it is the responsibility of the Network Administrator to ensure all Firewall Exceptions are in place.

3.0 Mobile Configuration

3.1 Sage 300 People Configuration

The final configuration takes place within Sage 300 People, here you will configure the QR code used to register employees to their profiles in Sage 300 Web Self Service.

Open Sage 300 People and Navigate to Self Service

Expand Setup > Web Settings and under Mobile define your Public API URL, the URL must contain the same hostname and port number used during installation.
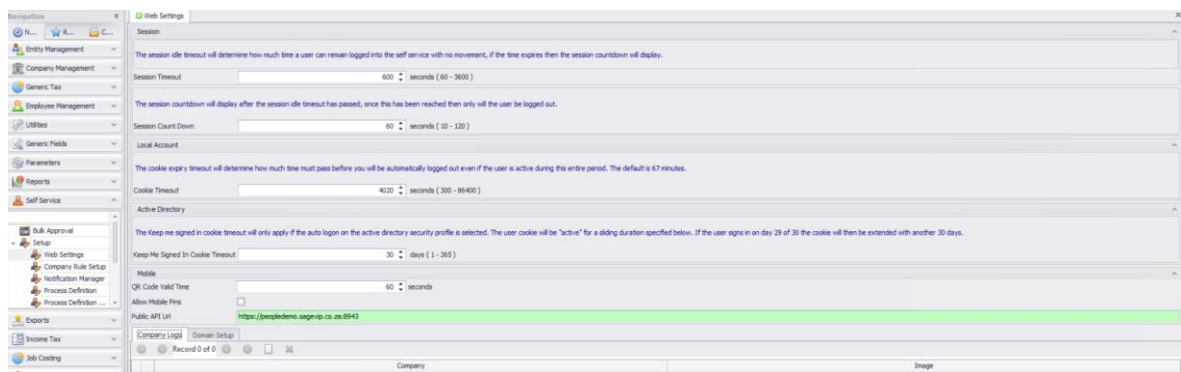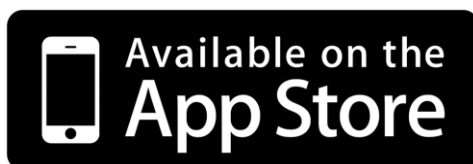

> The QR Code Valid Time field allows you to define for how long each QR code will be valid. Each QR code is unique per employee and should not be shared with any other employee.

Save the changes and Exit Sage 300 People

3.2 Downloading and Registering device

The Sage Self Service application is available for both Android and IOS devices.

Login to Sage 300 Web Self Service
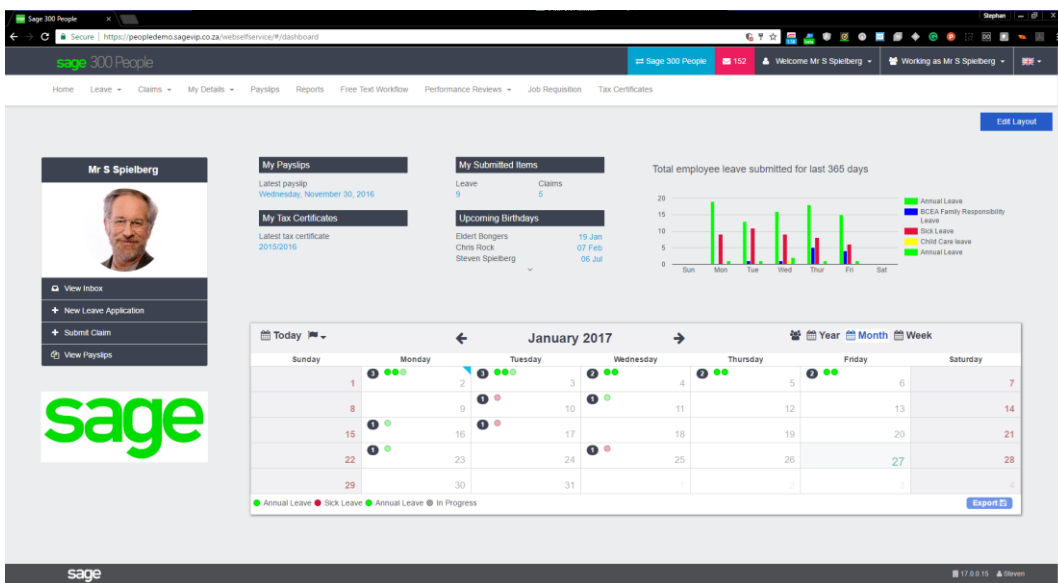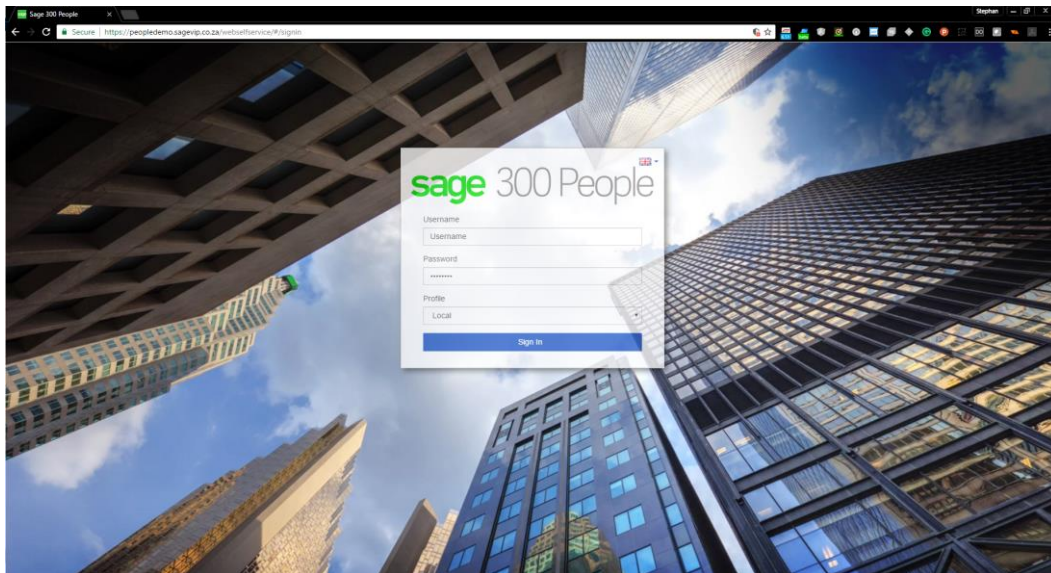
Click the Welcome Dropdown and click on Setup Mobile
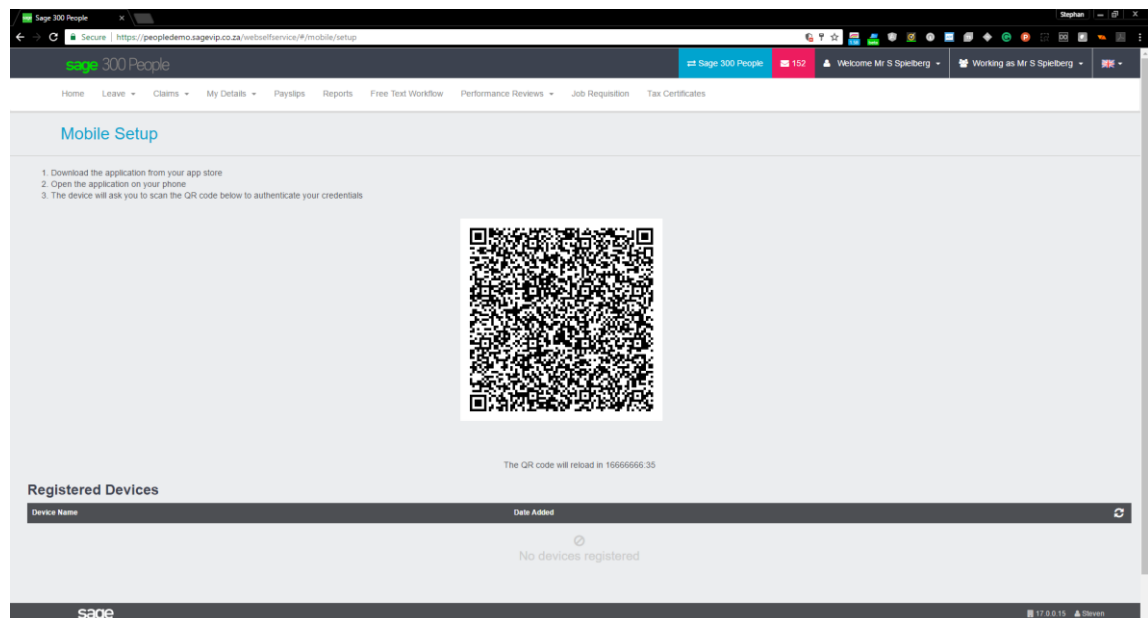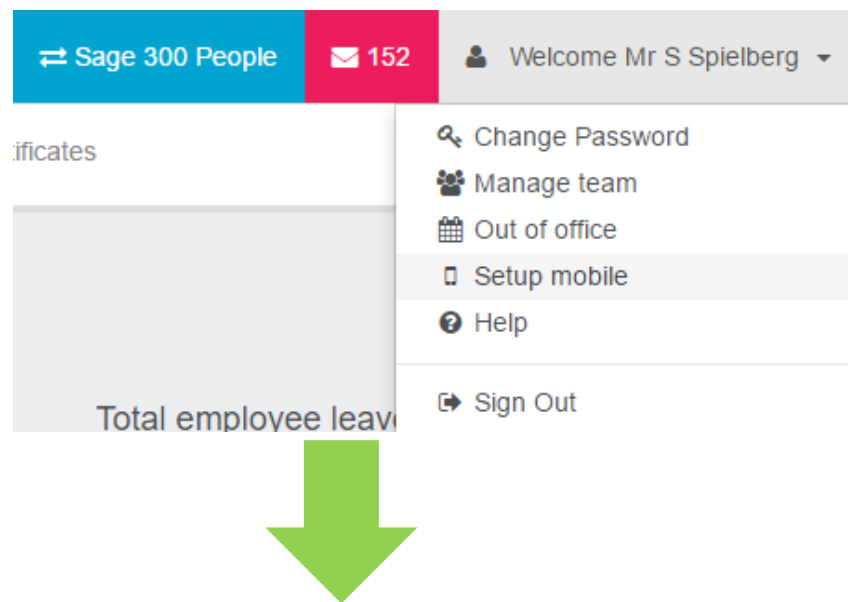
The QR Code is unique per employee and will refresh as per the Setup in Sage 300 People Payroll.
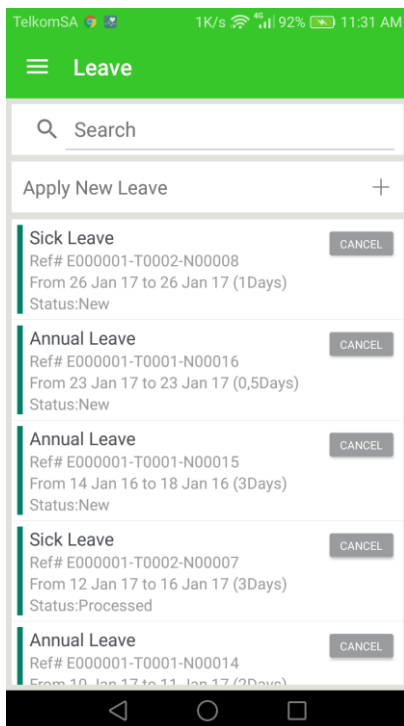
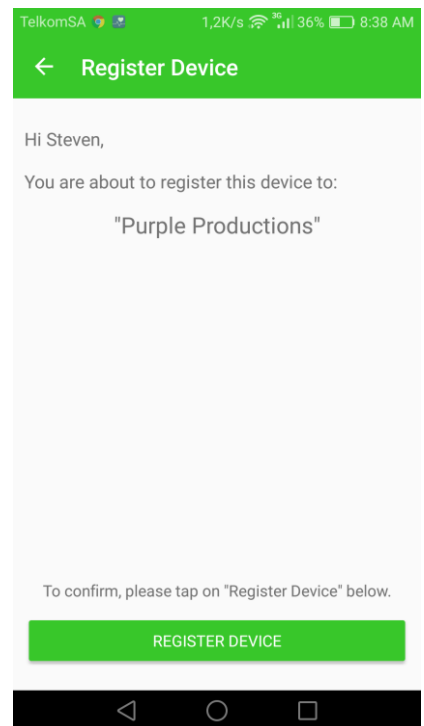## 3.3 Launch the application and register to employee record
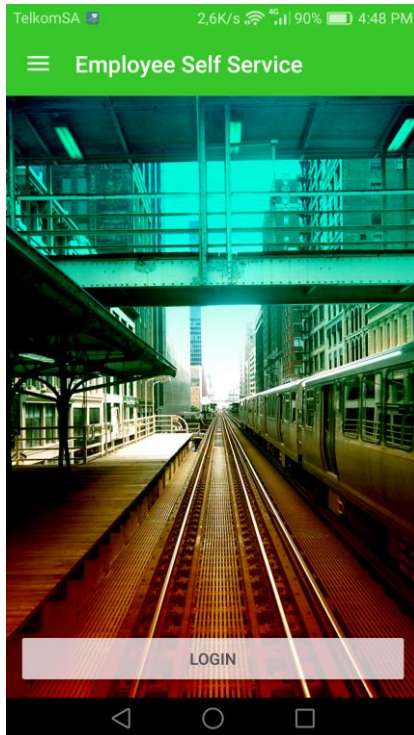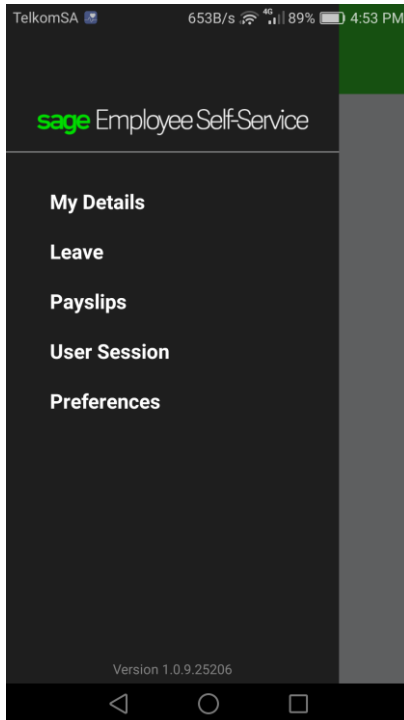

Select Login

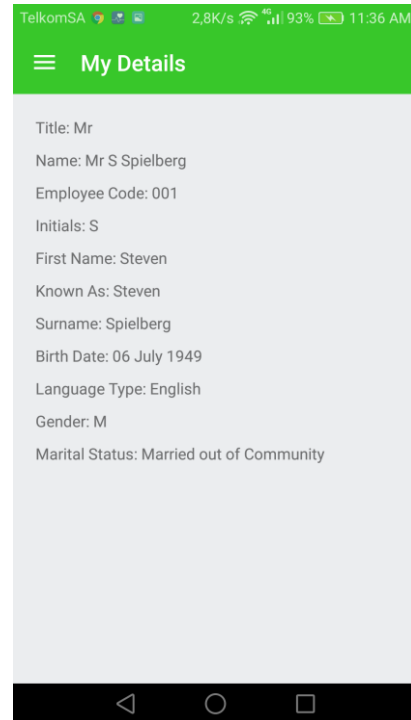Use the camera to scan the QR Code

Default Landing Page

Employee Details retrieved from QR Code, select Register Device
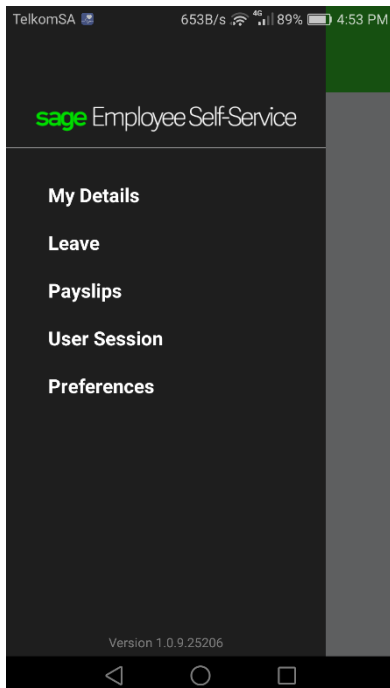
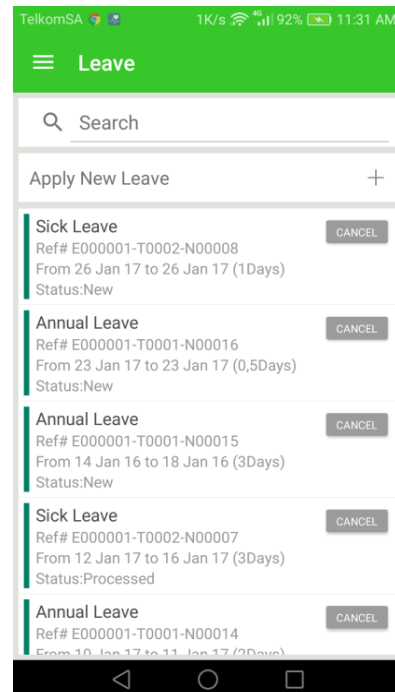# 4.0 Mobile Functions

4.1 View My Details

Select My Details

Employee Details displayed.

4.2 Leave

4.2.1 Apply for Leave

Select Leave

Select Apply New Leave

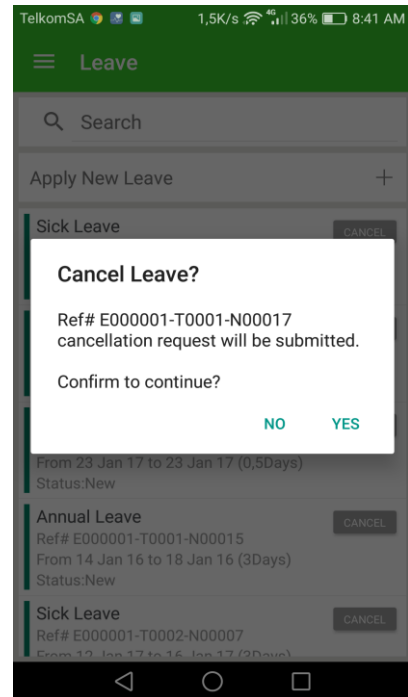Apply Leave Screen

Select Leave Type

Leave Successfully Submitted

Add a Reason, Choose Dates and add comments.
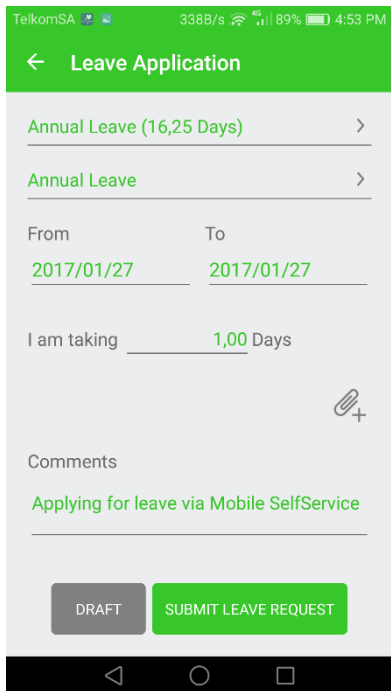
4.2.2   Cancel Leave
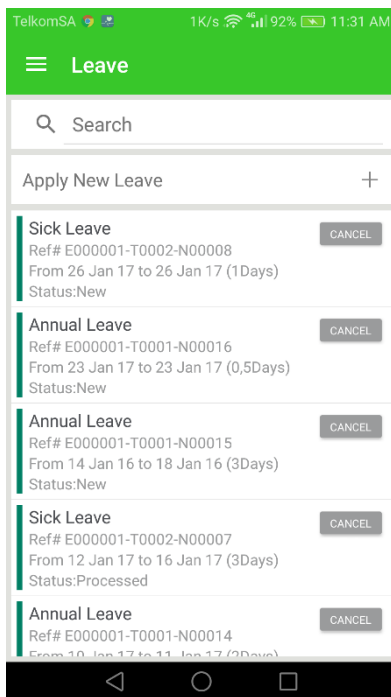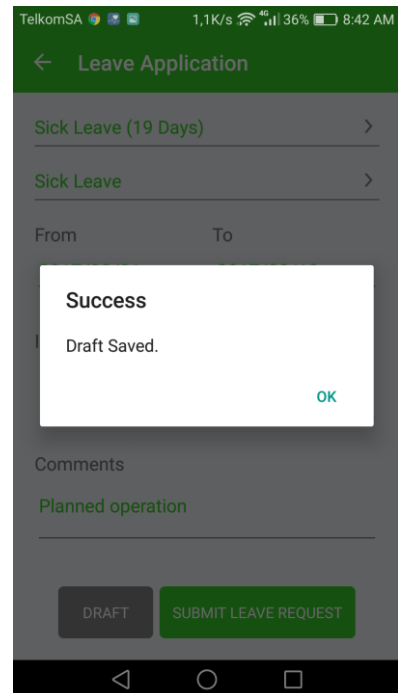

Leave Screen

Select Cancel and Yes if correct

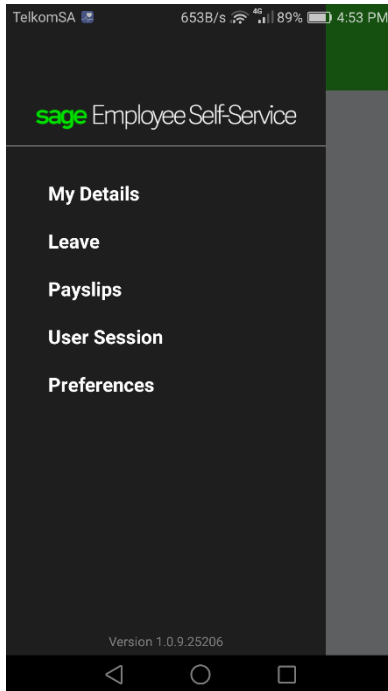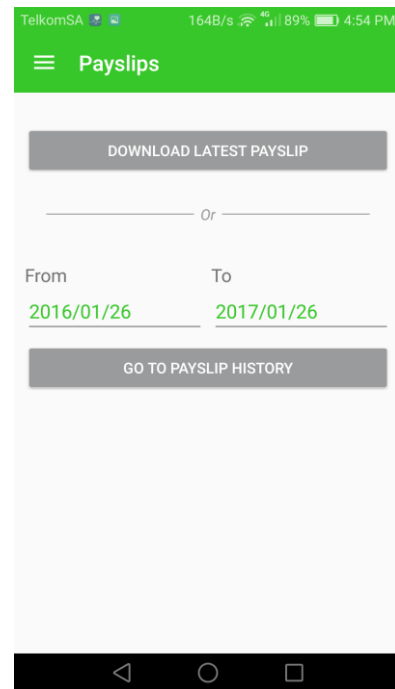### 4.2.3   Leave Draft

Apply Leave Screen

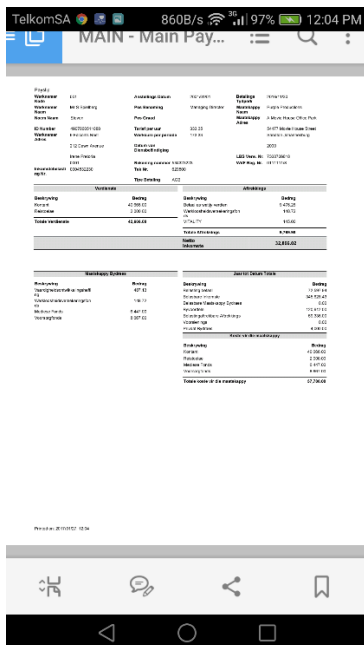Select Draft to save as a draft
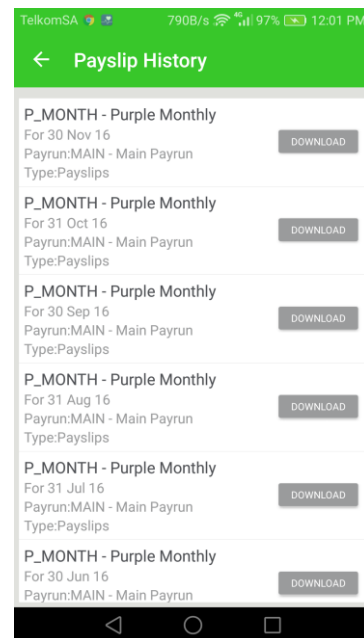
4.3   Payslips

Select Payslips

Either download Latest Payslip or view History Payslips
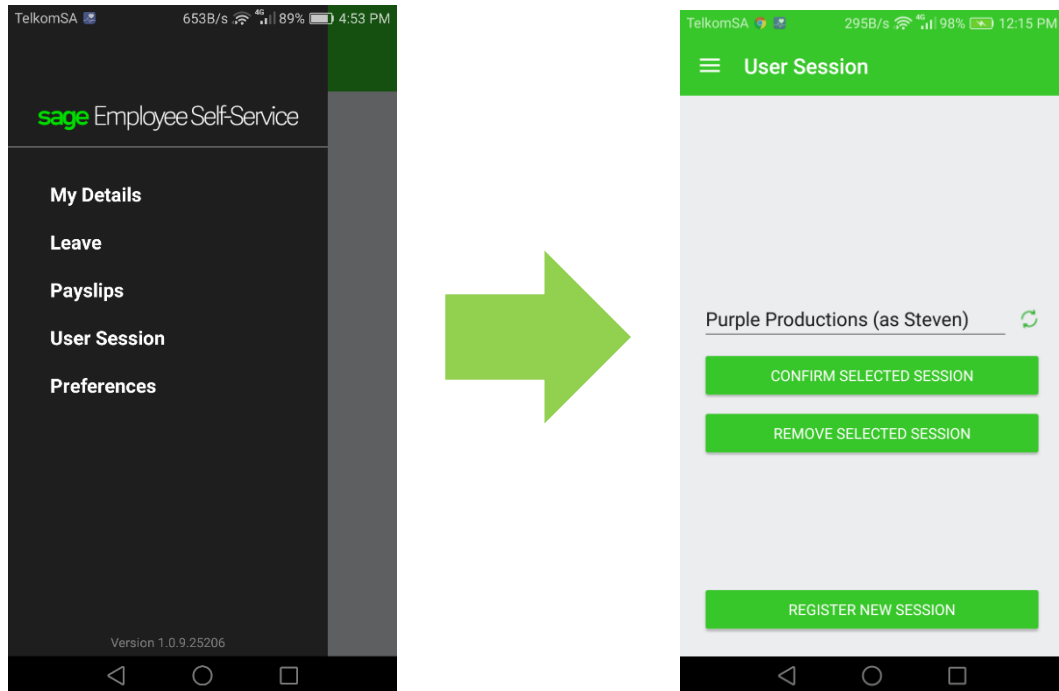

PDF Payslip
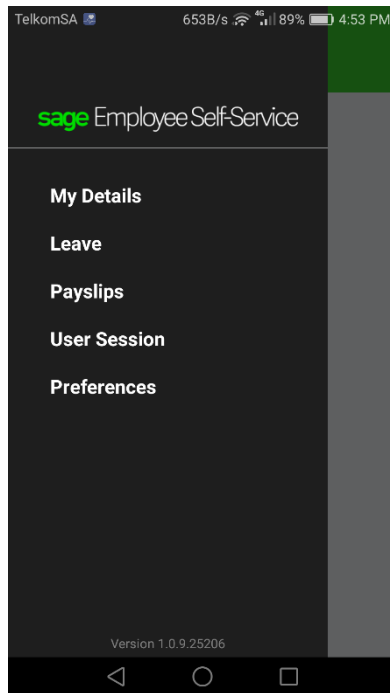

History Payslips select download.
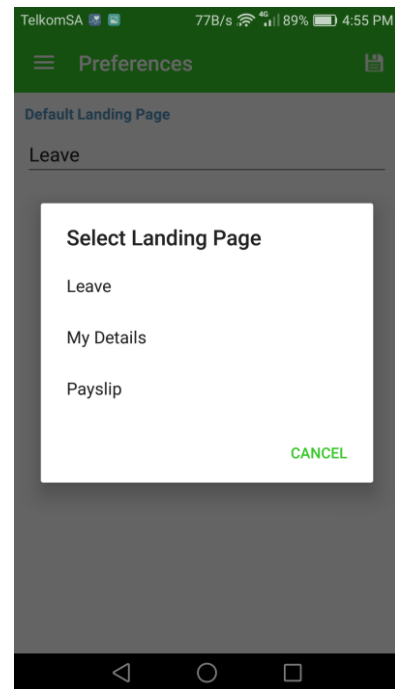
4.4   User Session

Select User Session

User Sessions allows you to either switch between registered profiles, remove a selected profile from the mobile device or to register a new session by means of scanning another QR Code.

4.5   Preferences

Select Preferences

Select your Default Landing Page

The default landing page can be changed to Leave, My Details or Payslip. Once selected click on the save icon to update your selection.