

Sage XRT Solution

Deployment guide

Version 2024



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Distribution:

- Sage technical consultants
- Technical consultants from our partners

Before you start

Important! Read carefully the document titled SXS.2024.TechnicalGuidelines.

Especially if you are <u>deploying **Sage XRT Solution** on a virtual machine</u>, you must ensure that:

- your physical hardware environment is powerful enough to execute all the virtual machines on which you plan to deploy the solution,
- your physical hardware environment is powerful enough to really and effectively allocate Core and RAM resources,
- you respect, as a minimum, the following recommendations from Microsoft if you plan to deploy SQL Server on a virtual environment:
 - 1. your database files shall be apart, not on a virtual drive but on a high velocity physical drive,
 - 2. it is preferable to separate SQL Server from your IIS server for memory usage consumption.

In terms of memory usage, **Sage XRT Solution** is a highly customizable product: the more your users take advantage of the product's capabilities, the more memory they will consume.

We recommend a VM with 64GB RAM, 13 Tenants with an average of 2.7 end users:

- Sage XRT Solution Advanced IIS pool: 12GB
- Sage XRT Solution Advanced Odata IIS pool: 1.5GB
- Sage XRT Solution Advanced Batch Service: 3GB
- Sage XRT Solution Common Functional Service (SCDTS): 500MB
- Sage XRT Solution Common Authentication Service (SCAS): 100MB
- Sage XRT Solution Common Administration Service (SCPS): 500MB
- Sage XRT Solution Communication & Signature: 1GB

Changes impacting the deployment of Sage XRT Solution

- **Sage XRT Solution 2024** proposes a <u>unique launcher</u>, automating the installation of <u>all</u> its components and automating database updates.
- **Sage XRT Solution** is now multi-tenant (one instance of the application serves different customers).
 - During updates, tenant names and information are automatically retrieved from **Common Services** elements.
 - To execute Sage XRT Solution for a specific tenant, open your web browser and enter the following text in the address bar: http://localhost:INSTALL_PORT/TENANT_NAME.
 - To select a tenant from the user interface, enter **http://localhost:INSTALL_PORT** and select a tenant from the list.



• As of version 2023 R1, oData© component is mandatory, since it is used by **XRT Solution Communication & Signature** services to push information to **Treasury** in real time.

Note: Like the application, oData© is now multi-tenant. To authenticate with your user name and password, you must prefix your user code with the tenant name in the form *TENANT_NAME\USER_CODE*.



• All **XRT Solution** Windows services are renamed and prefixed with *Sage XRT Solution* as shown below. Note that Redis© (https://redis.io/) remains our third-party component to maintain in memory data cache and inter-process communications.

Nom	Description	État	Type de démarrage	Ouvrir une session en tant que
Publication des ressources de découverte de fonctions	Publie cet ordinat	En cours d'exécution	Manuel (Déclencher le démarrage)	Service local
ell'inconecteur de port du mode domateur des services dureau a dis-	PRIMES IN DOMESSION	CIT COURS & EXECUTION	manuer	Système local
🖾 Redis	SAGE_CACHE (This	En cours d'exécution	Manuel	Service réseau
Provident Concern	Bernet en et Fre		tuto susticus (d) encher le démarrage)	Service local
Requête du service VSS Hyper-V	Coordonne les co		Manuel (Déclencher le démarrage)	Système local
C. Routage et accès distant	Offre aux entrenri		Décartivé	Système local
Sage XRT Solutions Advanced Batch Service (Sage XRT Advanced)	Host for batch tas	En cours d'exécution	Manuel	Système local
Sage XRT Solutions Advanced Communication Monitor	Sage XRT Solution_	En cours d'exécution	Manuel	Système local
Sage XRT Solutions Advanced LAD Server	Sage XRT Solution	En cours d'exécution	Manuel	Système local
Sage XRT Solutions Advanced Signature Monitor	Sage XRT Solution	En cours d'exécution	Manuel	Système local
Sage XRT Solutions Advanced Communication (SXSABCPServer)	Sage XRT Solution	En cours d'exécution	Manuel	Système local
A Sage XRT Solutions Advanced Signature (SXSAPDSServer)	Sage XRT Solution_	En cours d'exécution	Manuel	Système local
A Sage XRT Solutions Common Administration Service (SCPSServer)	Sage XRT Solution	En cours d'exécution	Automatique	Système local
Sage XRT Solutions Common Authentication Service (SCASServer)	Sage XRT Solution	En cours d'exécution	Manuel	Système local
Sage XRT Solutions Common Functional Service (SCDTSServer)	Sage XRT Solution	En cours d'exécution	Manuel	Système local
-cell serveds	Prena en charge I_	en cours a execution	Automatique (declencher le démarrage)	Système local
Serveur de trame de la Caméra Windows	Permettre à plusie		Manuel (Déclencher le démarrage)	Service local
Children Serveur Gestionnaire de licences Windows	Offre une prise en		Manuel (Déclencher le démarrage)	Service local
Service antivirus Microsoft Defender	Protège les utilisa	En cours d'exécution	Automatique	Système local
Service Arrêt de l'invité Microsoft Hyper-V	Propose un méca		Manuel (Déclencher le démarrage)	Système local
Service Broker de découverte en arrière-plan DevQuery	Permet aux applic		Manuel (Déclencher le démarrage)	Système local
Character des événements système	Coordonne l'exéc	En cours d'exécution	Automatique (déclencher le démarrage)	Système local
a Service Broker du moniteur d'exécution System Guard	Surveille et garant		Manuel (Déclencher le démarrage)	Système local
Service Broker pour les connexions réseau	Connexions du se	En cours d'exécution	Manuel (Dédencher le démarrage)	Système local
Service Broker pour les événements horaires	Coordonne l'exéc	En cours d'exécution	Manuel (Dédencher le démarrage)	Service local
Service Collecteur standard du concentrateur de diagnostic Micro	Service Collecteur		Manuel	Système local

- Regarding import/export folders, the following behavior is implemented during the upgrade from a multi-instance to a multi-tenant architecture:
 - In case personal import/export folders were configured in a *tenant.config* file, they are automatically assigned to the tenant during the upgrade process.
 - Import/export folders can now be defined in Common Services web console under Rights

 Environment Setup.

This information is stored in the registry: HKEY_LOCAL_MACHINE\SOFTWARE\XRT\Common\TENANTS.

Eléments de sécurité	×	<
Clé pour le cryptage de la base de données		
Security_code]
Répertoires d'importation		
1		
	Annuler Enregistrer	



• Automatic usage of tenant names complements common folder settings. During the installation, you can define common import/export directories that will be placed to the common part of the *.config* file.

Example:

- During installation, configure C:\BANK_IMPORT;C:\GL_IMPORT as common directory paths.

– Manually create folders C:\BANK_IMPORT\TENANT_1, C:\BANK_IMPORT\TENANT_2, C:\GL_IMPORT\TENANT_1, etc.

- Sage XRT Solution automatically uses dedicated per-tenant subfolders.

• If you are using SAML authentication, in the setup of **Sage XRT Solution**, the tenant "segment" must be specified in the redirection URL as follows:

From https://XXXXXX.domain.zz/useraccount/logonxcsweb,

to https://XXXXXX.domain.zz/<tenant_name>/useraccount/logonxcsweb.

- Remove all *.SAV* configuration backup files existing on your environment. They are no longer required as the settings are properly managed by the deployment package.
- **Important!** You must <u>remove the existing 2048-bit certificate</u> before deploying version 2024.

certIm - [Certificats - Ordinateur local/Personnel/Certificats] H .ul 10.169 Fichier Action Affichage ? 10.169					59.233.238		- 8 ×	
🗢 🔿 🙍 📆 🖌 🖬 🗙 🛙	1 🔒 🛛 🖬							
 Certificats - Ordinateur local Personnel Certificats 	Délivré à	Délivré par	Date d'expirati	Rôles prévus	Nom convivial	Statut	Modèle de cert	
1	Sage.fcs.client	Sage.fcs.client	08/07/2031	<tout></tout>	<aucun></aucun>			

Installing **Sage XRT Common Services** will deploy a 4096-bit certificate. Once the deployment is complete and your databases are updated, remember to attach this certificate to:

- Sage XRT Advanced application pool
- Sage XRT Advanced OData application pool





To check the version of your certificate, open **IIS**.

Double-click Server Certificates.

Select the Sage.FCS.client certificate and click **View...**, then open the **Details** tab.

Server 6	Certificates				Actions
Use this feature to re	quest and manage certificates that the	Web server can use with websites config	ured for SSL.		Create Certificate Request Complete Certificate Request
Name	Issued To	Issued By	Expiration Date 12/10/2028 14:47:12 21/12/2025 14:43:27	Certif D065(71586	Create Domain Certificate Create Self-Signed Certificate View
	Sage.fcs.client	Sage.fcs.client	12/07/2034 11:46:33	63E8I	Remove Enable Automatic Rebind of Renewed Certificate Help
	Show: <all> Field Valid from Subject Public key Public key Usage Thumbprint</all>	Value vendredi 12 juillet 2024 11:46:33 mercredi 12 juillet 2034 11:46:33 FR, Sage, XRT, Sage, fcs.client RSA (4096 Bits) 05 00 Key Encipherment, Key Agree 63e8d3388ed98d72a2c34f1a2			

If the certificate is 2048-bit, delete it and then relaunch the **Web Console** from **Sage XRT Common Services** to automatically generate a new certificate.

Be sure to attach the certificate to the two application pools listed above to complete the operation.

Naming Conventions

Important! Make you sure you have all the names for the following elements defined prior to installation.

On-premises or cloud single-tenant deployments

Suggested conventions for Sage XRT Solution Communication & Signature			
Tenant	XRT_COMSIGN_suffix		
Common Services database for Communication & Signature	XRT_SCS_COMSIGN_suffix		
XRT Solution Communication database	XRT_COM_suffix		
XRT Solution Signature database	XRT_SIGN_suffix		

Suggested conventions for Sage XRT Solution Advanced TMS			
Tenant	XRT_ADVANCED_suffix		
Common Services database for XRT Advanced	XRT_SCS_ADVANCED_suffix		
XRT Solution Advanced database	XRT_ADVANCED_suffix		

Note: Suffix is optional and can be used to indicate a status (*PROD*, *TEST*, etc.) for database naming.

Cloud multi-tenant deployments

Suggested conventions for Sage XRT Solution Communication & Signature				
Tenant	XRT_COMSIGN_suffix			
Common Services database for Communication & Signature	XRT_SCS_COMSIGN_suffix			
XRT Solution Communication database	XRT_COM_suffix			
XRT Solution Signature database	XRT_SIGN_suffix			

Note: Communication & Signature are multi-tenant at database level.

Suggested conventions for Sage XRT Solution Advanced TMS				
Tenant	XRT_ADVANCED_clientID_suffix			
Common Services database for XRT Advanced	XRT_SCS_ADVANCED_clientID_suffix			
XRT Solution Advanced database	XRT_ADVANCED_clientID_suffix			

Note: *ClientId* is whatever may uniquely identify the customer.



Fresh installation

Deployment checklist

The following elements will be required for the deployment process. Make sure they have been prepared prior to the installation.

- Have your Sage licenses ready.
- Configure a Windows account service to start and run **XRT Common Authentication**, **Administration** and **Functional** services.
- Configure a Windows account service to start and run **XRT Advanced Batch** and **Scheduler** services.
- Configure a Windows account service to start and run **XRT Communication** service.
- Configure a Windows account service to start and run XRT Signature service.
- Specify a local or network directory structure for received files.
- Specify a local or network directory structure for exported files.

Installation procedure

• First, you need to browse your disk to find the launcher file named **Setup**.

L ☑ L = Disk1 Fichier Accueil Partage	e Affichage			
← → × ↑ 📕 > Ce l	PC > Disque local (C:) > XRT PRODUCT	> build 0021 > Disk1 >		
	Nom	Туре	Taille	Modifié le
Accès rapide	BankFormatLibrary	Dossier de fichiers		30/10/2023 17:29
Buleau x	CommonServices	Dossier de fichiers		30/10/2023 17:29
 Telechargements # 	Prerequisites	Dossier de fichiers		30/10/2023 17:29
Documents *	Treasury-Communication	Dossier de fichiers		30/10/2023 17:29
🔚 Images 🛛 🖈	Treasury-Signature	Dossier de fichiers		30/10/2023 17:29
XRT PRODUCT	XRTAdvancedMultitenant	Dossier de fichiers		30/10/2023 17:29
🧢 Ce PC	Setup	Application	2 280 Ko	30/10/2023 17:15
Bureau				

• Right-click on Setup and select Run as administrator.

• Select a language and click **Next**, then **Next** again to confirm the installation of **Sage XRT Solution 2024**.

Sage XRT Solutions 2023 F	t1 (build 0021) - InstallShield Wizard	×
Choose Setup	Language	
sage	Select the language for this installation from the choices below. English (United States) ~	
XRT Solutions		
InstallShield"	Next > Cancel	



• For the purpose of this document, select **Custom** as a **Setup Type**.



The setup wizard analyzes your system and pre-selects the modules and/or components that can be installed.



• Refine your selection and click Install.

The setup wizard will execute the installation packages for each module one after the other. If required, you may be asked to reboot the system. Then, the installation will automatically resume.

Installation of Sage XRT Bank Format Library

• When the following screen appears, click **Next** to confirm the installation, then enter any username you want (purely informative) and click **Next** again.

🖤 Sage XRT Solu	tions 2023 R1 (build 0021) - InstallShield Wizard	×
Installin	g Sage XRT Solutions 2023 R1 (build 0021)	
	🕼 Sage XRT Bank Format Library - InstallShield Wizard 🛛 🗙]
sag	Bienvenue dans l'assistant InstallShield(R) pour Sage XRT Bank Format Library version : 6.1.103.1560	
XRT Solu	L'assistant InstallShield(R) va installer Sage XRT Bank Format Library sur votre système. Pour continuer, cliquez sur Suivant.	
	ATTENTION : Ce programme est protégé par la loi du copyright et les conventions internationales.	
	sage	
	< Précédent Suivant > Annuler	
InstallShield*		Cancel

bca	Sage XRT Bank Format Library - InstallShield Wizard Informations client Indiquez les informations demandées.	× pe
(RT Solu	Nom ytilisateur:	
	v6.1.103.1560 < Précident Suivant > Annu	er

• If required, click **Change...** to select a destination folder for the installation, then click **Next**.

Note: We recommend that you keep the folder paths and only change the volume if needed.

🗫 Sage XRT Solu	tions 2023 R	11 (build 0021) - InstallShield Wizard	×
Installin	g Sage	XRT Solutions 2023 R1 (build 0021)	
1000			
	Sage XR	T Bank Format Library - InstallShield Wizard X	
	Dossier ci	ible cono	
sad	Cliquez : les insta	sur Suivant pour installer les fichiers dans ce dossier ou sur Modifier pour	
	27	Installer Sage XRT Bank Format Library vers:	
XRT Solu		C:\Program Files\Common Files\xrt\ Modifier	
	v6.1.103.1560		
		< Précédent Suivant > Annuler	
		Can	cel

• Unless you have a precise idea of your future needs, you may choose to install the program for **All users**, then click **Install**.



The install process starts.

Wait until the operations are completed and the following screen appears, confirming that **Sage XRT Bank Format Library** has been installed.

Sage XRT Solutions 2023 R1 (build 002	1) - InstallShield Wizard	×
Installing Sage XRT S	Solutions 2023 R1 (build 0021)	
🛃 Sage XRT Bank Form	nat Library - InstallShield Wizard X	
san	Installation de Sage XRT Bank Format Library v6.1.103.1560 terminé	
XRT Solu	L'InstallShield Wizard a installé Sage XRT Bank Format Library avec succès. Cliquez sur Terminer pour quitter l'assistant.	
Sage	Afficher le journal de Windows Installer	
	< Précédent Terminer Annuler	
InstallShield*		Cancel

• Click **Finish** to continue to the next installation step.

Installation of Sage XRT Common Services

• When the following screen appears, click **Next** to confirm the installation, then enter any username you want (purely informative) and click **Next** again.

🕞 Sage	XRT Common Servi	ces - Assistant InstallShield X	
ag		Bienvenue dans l'assistant InstallShield(R) pour Sage XRT Common Services version : 6.1.104.1605	
RT Solu		L'assistant InstallShield(R) va installer Sage XRT Common Services sur votre système. Pour continuer, cliquez sur Suivant.	
		AVERTISSEMENT : ce logiciel est protégé par la loi relative au droit d'auteur et par les conventions internationales.	
S	age	Sage XRT Bank Format Library v.6.1.103.1560	
		< Précédent Suivant > Annuler	

👓 Sage XRT Solu	tions 2023 R1 (build 0021) - InstallShield Wizard	×
Installin	g Sage XRT Solutions 2023 R1 (build 0021)	
cod	Sage XRT Common Services - Assistant InstallShield Informations client Indiquez les informations demandées.	
XRT Solu	Nom utilisateur: USER Organisation: SAGE	
	v6.1.104.1605 < Précédent Suivant > Annuler	
InstallShield		ancel

• If required, click **Change...** to select a destination folder for the installation, then click **Next**.

Note: We recommend that you keep the folder paths and only change the volume if needed.



• Since you are deploying **Sage XRT solution**, you need all the components to be installed! Select the **Complete** setup type and click **Next**.



 Select the options Change service startup accounts and Use the same account for all services, then complete the fields dedicated to the Windows services used to start and run the common Authentication, Administration and Functional services (Refer to <u>Deployment</u> <u>Checklist</u>).



• Unless you have a precise idea of your future needs, you may choose to install the program for **All users**, then click **Install**.



🗫 Sage XRT Soluti	ions 2023 R1 (build 0021) - InstallShield Wizard	\times
Installing	Sage XRT Solutions 2023 R1 (build 0021)	
sad	Sage XRT Common Services - Assistant InstallShield × L'Installation du programme peut commencer Toutes les informations nécessaires à l'installation sont réunies.	
XRT Solu	Pour vérifier les paramètres d'installation ou les modifier, cliquez sur Précédent. Pour quitter l'assistant sans installer le programme, cliquez sur Annuler. Installer ce programme pour: Tous les utilisateurs du système L'utilisateur en cours uniquement (USER)	
v	6 1.104.1605 	
InstallShield		Cancel

The install process starts.

Wait until the operations are completed and the following screen appears, confirming that **Sage XRT Common Services** has been installed.



• Click **Finish** to continue to the next installation step.

To continue with the setup process, both **Administration** and **Authentication** services must be started and running.

The setup wizard proposes to restart your system.



• Click **Yes** to reboot.



Note: Click No only if you know exactly when and how to properly start the services.

After the reboot, the installation process will automatically resume.





• In the Program Maintenance screen, click Modify.



In the **Custom Setup** screen, the items **Sage XRT Bank Format Library** and **Sage XRT Common Services** should now appear unchecked.

• Click **Install** to continue to the next installation step.



Installation of Sage XRT Communication

• When the following screen appears, click **Next** to confirm the installation.



• Since you are deploying **Sage XRT solution**, you need all the components to be installed! Select the **Complete** setup type and click **Next**.

	🛃 Sage XRT Treasury - Communication - InstallShield Wizard 🛛 🛛 🗙
an	Type d'installation Sélectionnez le type d'installation voulu.
ug	Complète
RT Solu	Permet d'installer toutes les fonctions du programme. (Besoins maximum en espace disque.)
	O Personnalisée
	Permet d'effectuer une installation sélective et de définir l'emplacement cible des fonctions choisies. S'adresse aux utilisateurs plus expérimentés.
	O Poste client
	Cette option vous permet d'installer Sage XRT Treasury - Communication sans le service LAD, le moniteur de communication ainsi que le service de communication.
	O Scripts de base de données
	Cette option vous permet d'installer uniquement les scripts sol et le fichier xml d'import des droits applicatifs.
	InstallShield
	< Précédent Suivant > Annuler

• If required, click Change... to select a destination folder for the installation, then click Next.

Note: We recommend that you keep the folder paths and only change the volume if needed.

" an	Sage XRT Treasury - Communication - InstallShield Wizard bossler cible Cliquez sur Sulvant pour installer les fichiers dans ce dossier ou sur Modifier pour S les installer chaes un autre dossier.	age
RT Solu	Installer le Workspace vers: C:\Program Files\Sage\8CP\Wkspace\	hange

• In the **Communication** service configuration screen, enter a name for the **Tenant** (refer to **Naming Conventions**).

nc	Sage XRT Treasury - Cor Configuration du service Indiquez les informations	mmunication - InstallShield Wizard × de Communication de connexions du service.
RT Solu	Tenant : COMMSIGN Ouvrir une session en ta Compte système local © Ce compte Mot de passe :	pool/Administrateur
	InstallShield	< Précédent Sulvant > Annuler

• Select **This account** and specify the information of the Windows service account used to start and run the **Communication** service, then click **Next**.

Note: We recommend that you <u>do not use</u> the **Local system account** option.

• When the following screen appears, click **Install**.



The install process starts.

Wait until the operations are completed and the following screen appears, confirming that **Sage XRT Communication** has been installed.



• Click **Finish** to continue to the next installation step.



Installation of Sage XRT Signature

• When the following screen appears, click **Next** to confirm the installation.



• In the Operating system screen, select Microsoft and click Next.



• Since you are deploying **Sage XRT solution**, you need all the components to be installed! Select the **Complete** setup type and click **Next**.

🖤 Sage XRT Solu	tions 2023 R1 (bui	ld 0021) - InstallShield Wizard	×
Installat	ion de Sa	ge XRT Solutions 2023 R1 (build 002	1)
Sag XRT Solu	Sage XRT Trea Type d'installat Sélectionnez le Complète Complè	sury - Signature - InstallShield Wizard X in type d'installation voulu. Fermet d'installer toutes les fonctions du programme. (Besoins maximum sice Permet d'installer signature și de définir l'emplacement cible des fonctions choisies. S'adresse aux utilisateurs plus expérimentés. In Cette option vous permet d'installer sage XRT Treasury - Signature sans le service IAD, nil service de signature, ni le sitie web. base de donnés Cette option vous permet d'installer uniquement les scripts sol et le fichier xml d'import des droits applicatifs. 	
InstallShield*			Annuler

• If required, click **Change...** to select a destination folder for the installation, then click **Next**.

Note: We recommend that you keep the folder paths and only change the volume if needed.



• In the **Web site** configuration screen, enter the same exact **Tenant** name as specified for **Sage XRT Communication** (refer to **<u>Naming Conventions</u>**).

Sage XRT Sol	lutions 2023 R1 (build 0021) - InstallShield Wizard	×
Installat	tion de Sage XRT Solutions 2023 R1 (bu	ild 0021)
sad	Sage XRT Treasury - Signature - InstallShield Wizard Configuration du site web Indiquez le nom du site web.	æ
XRT Solu	Tenant : COMMSIGN Ouvrir une session en tant que : Compte système local @ Ce compte Mot de passe : 	
	InstallShield <pre></pre>	Annuler
InstallShield"		Annuler

• Select **This account** and specify the information of the Windows service account used to start and run the **Signature** service, then click **Next**.

Note: We recommend that you <u>do not use</u> the **Local system account** option.

• Keep the default name proposed for the site and click **Next**.

	🕼 Sage XRT Treasury - Signature - InstallShield Wizard 🛛 🗙	
5 30	Indiquez le nom du site web.	
(RT Solu	u	
	Nom : prkreBanking	

• When the following screen appears, click **Install**.



The install process starts.

Wait until the operations are completed and the following screen appears, confirming that **Sage XRT Signature** has been installed.



• Click **Finish** to continue to the next installation step.



Installation of Sage XRT Advanced TMS

• When the following screen appears, enter the same name for both **Set Site Name** and **Application Pool Name** fields (Refer to <u>Naming Conventions</u>).

	Sage XRT Advanced MultiTer	nant - InstallShield W	izard X	<
ane	Setup Site Configuration		sage	2
(PT Solutions	Set Site Name Sage.XRT.Advanced		Automatic logout inactivity timeout, min	
arti ooluliono	Application Pool Name			
	Sage.XRT.Advanced		Use secure connection HTTPS	
	Port Number		Port Number for Batch Tasks	
	1025	Modity	1026	
	UserName RatchTasks Service	Passwor	d	

Automatic logout inactivity timeout is a security parameter that will automatically disconnect any end-user after a specified period of inactivity. The default period is set to **15** minutes.

Note: The login timeout value can be changed later by IT, by editing the *XXXX_tenants.config* file.

The default listening ports for the application are defined as follows:

- 1025: Treasury IIS application pool
- 1026: Treasury asynchronous batch tasks service
- 1027 : Treasury OData

Note: To change these settings, refer to **<u>Science Direct - Registered Ports</u>** or contact your IT department.

 Specify the information of the Windows service account used to start and run the asynchronous Batch Tasks Service – the same as used for Communication and Signature services – then click Next. • Since you are deploying **Sage XRT solution**, you need all the components to be installed! Select the **Complete** setup type and click **Next**.

Sage XRT Solutions 2023	3 R1 (build 0021) - InstallShield Wizard	\times
Installation d	le Sage XRT Solutions 2023 R1 (build 0021)	
	. Sage XRT Advanced MultiTenant - InstallShield Wizard X	
sage	Sage	
XRT Solutions	Please select a setup type.	
	Complete All program features will be installed, (Requires the most disk space.)	
	Cluston Choose which program features you want installed and where they will be installed. Recommended for advanced users.	
	InstallShield	
	< Back Next > Cancel	
InstallShield	Annul	er

• In the Odata configuration screen, click Next.

Sage XRT Solutions 2023	3 R1 (build 0021) - InstallShield Wizard	\times
Installation d	le Sage XRT Solutions 2023 R1 (build 0021)	
	🗑 Sage XRT Advanced MultiTenant - InstallShield Wizard X	
sage	Odata configuration	
XRT Solutions	Odata Site Name Sage XKT Advanced Odate Odata Port Number 1027 InstallShield K Back Next > Cancel	
InstallShield"	Annu	ler

Note: OData stack is now mandatory. We strongly suggest that you keep the proposed values:

 The default Odata Site Name corresponds to the Application Site Name followed by the suffix ".oData".

- The default **Odata Port Number** corresponds to the Application Port + 2.



 If you are deploying the solution on-premises, or in a single-tenant environment, specify your local or network folder structure for received and exported files (Refer to <u>Deployment</u> <u>Checklist</u>) in the Import folders configuration screen, then click Next.

Otherwise, refer to **item 5** of **Changes impacting the deployment of Sage XRT Solution**.

	Sage XRT Advanced MultiTenant - InstallShield Wizard X		
age	Import Folders configuration		
-	Allowed path(s) for Import Folders:		
RT Solutions	Please specify one or more local folders paths separated with semicolons to allow creation of Import Folders within them locally on the server (you do not need to specify external network paths starting from \\\).		
	Otherwise creation of Import Folders locally will be possible only within Public Doc\Documents).		
	For example, if allowed paths are specified like C:\BankFiles;D:\GiFiles in this case creation of Import Folders locally will be possible only in C:\BankFiles;D:\GiFiles;C:\Users\Public\Documents folders and in their sub-folders.		
	InstallShield		
	Carcel Next Carcel		

The install process starts.

Wait until the operations are completed and the following screen appears, confirming that **Sage XRT Advanced MultiTenant** has been installed.



• Click **Finish**.



• Click **Finish** to close the setup wizard.

Sage XRT Solution is now installed on your system.



Update of an existing multi-tenant platform

Installation procedure

• Browse your disk to find the launcher file named **Setup**.

	PC > Disque local (C:) > XRT PRODUCT	> build 0021 > Disk1 >		
	Nom	Туре	Taille	Modifié le
Accès rapide Bureau # Téléchargements # Documents # Elmages #	BankFormatLibrary	Dossier de fichiers		30/10/2023 17:29
	CommonServices	Dossier de fichiers		30/10/2023 17:29
	Prerequisites	Dossier de fichiers		30/10/2023 17:29
	Treasury-Communication	Dossier de fichiers		30/10/2023 17:29
	Treasury-Signature	Dossier de fichiers		30/10/2023 17:29
XRT PRODUCT	XRTAdvancedMultitenant	Dossier de fichiers		30/10/2023 17:29
S Ce PC	sep Setup	Application	2 280 Ko	30/10/2023 17:15
Bureau				N

• Right-click on **Setup** and select **Run as administrator**.

The setup wizard analyzes your system and pre-selects the modules and/or components that need to be updated.



• Select the Update Databases option if required and click Install.

Make sure you that you have carefully read and understood the section **<u>Changes impacting the</u> <u>deployment of Sage XRT Solution</u>**, and you're done!

Update of an existing multi-instance platform

Reminder

A multi-instance platform corresponds to the deployment mode existing before multi-tenant version 2023 R1. Typically, this type of platform consisted of:

- 1 deployment of Bank Format Library (BFL) shared by all customers,
- 1 deployment of **Sage XRT Common Services** (SCS) <u>shared by all customers</u>, with 1 workgroup and 1 database per customer,
- 1 deployment of **Sage XRT Advanced** (SXA) <u>per customer</u>, with 1 workgroup and 1 database per customer,
- 1 deployment of Sage XRT Communication shared by all customers,
- 1 deployment of Sage XRT Signature shared by all customers.

Installation procedure

The following instructions enable you to move from a multi-instance to a multi-tenant platform installation.

- Uninstall any instance of Sage XRT Advanced.
- Browse your disk to find the launcher file named **Setup**.

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🕆 📜 > Ce	PC > Disque local (C:) > XRT PRODUCT	> build 0021 > Disk1 >			
A Andrewide	Nom	Туре	Taille	Modifié le	
Acces rapide Bureau	BankFormatLibrary	Dossier de fichiers		30/10/2023 17:29	
	CommonServices	Dossier de fichiers		30/10/2023 17:29	
	Prerequisites	Dossier de fichiers		30/10/2023 17:29	
	Treasury-Communication	Dossier de fichiers		30/10/2023 17:29	
🔚 Images 🛛 🖈	Treasury-Signature	Dossier de fichiers		30/10/2023 17:29	
XRT PRODUCT	XRTAdvancedMultitenant	Dossier de fichiers		30/10/2023 17:29	
Se PC	see Setup	Application	2 280 Ko	30/10/2023 17:15	
Bureau				N	



• Right-click on **Setup** and select **Run as administrator**.

The setup wizard analyzes your system and pre-selects the modules and/or components that need to be installed or updated.



• Refine your selection and click **Install**.

The setup wizard launches the fresh installation of **Sage XRT Advanced**.

Note: The instance is named **Sage XRT Advanced**. It can be changed during the installation process, but we recommend that you keep the default name.

All your previous SXA Workgroups will automatically be changed into Tenants.

• Follow the steps described in the **Fresh Installation** section.

Make sure you that you have carefully read and understood the section **<u>Changes impacting the</u> <u>deployment of Sage XRT Solution</u>**, and you're done!



Creation of Tenants and related Databases

Nothing new here!

You need to browse your disk to find the launcher file named **Administration Sage.NET**, and run the program **as administrator**.

Then just do as you have always done...







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