SAGE PARTNER CLOUD

Study Guide

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Sage Partner Cloud

Sage 200 Professional

Help us Improve our Courseware

Training Guide Version: 2
Your comments are important to us. Please contact us by emailing ukisageuniversity@sage.com,
Attention: Training Admin

Please note:
Every effort has been made to ensure that the information provided is accurate, up-to-date, and complete, but no guarantee is made to that effect. URLs and additional resources are continuously changing. Because the software is customizable in several ways, the language used in this guide may be different from what you 'see' when you work with your product.

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Introduction

This book has been designed to provide you with information for the Sage Partner Cloud for Sage 200 product line.

Learning Objectives

After completing this Sage Partner Cloud study guide, you will be able to:

- Explain what the Sage Provisioning Portal is
- Explain the basic screen elements in the Sage Provisioning Portal
- Explain the onboarding process to the Sage Partner Cloud solution
- Explain the workflow for creating a new partner account
- Access the Sage Provisioning Portal
- Assign and setup an Azure subscription in the Sage Provisioning Portal
- Add a new customer account and site in the Sage Provisioning Portal
- Explain how a customer initiates the invitation process for adding and assigning new users
- Explain how the customer accesses the Sage 200 solution.
- Explain how to set up product registration for Sage 200.
- Explain how to work with backups and how to repair a site.
- Explain how to manage additional Azure SQL servers in the Sage Provisioning Portal

Working With This Manual

You may come across some of the following icons to make your learning experience more interesting and visual:

	Important Information / Important Note / Additional Information	Item where caution and attention are required, or additional insight and information is provided.
	Exercise	Your opportunity to practice a concept.
	End of Exercise	Indicates the end of an exercise.
	Check Your Knowledge	Review questions at the end of a lesson to check your understanding and ability to implement concepts.
	Summary	Overview of the most important items covered in a section or lesson.
	End of Lesson	The end of the lesson.

Application Software Versions

Release Year

This study guide has been developed for Sage 200 Professional Release 1

Certification Assessments

Research has shown that in today's economy it is more important than ever for individuals to obtain solid technical skills and certified proof of their knowledge to secure the best job opportunities. Certification is becoming a requirement for many and the demand for certified professionals has dramatically increased.

Once you have completed a Sage training course, we would therefore encourage you to take the Sage competency assessment. Assessments are offered in English and in an online environment.

Once you complete the requirements to become certified, as a benefit of your certification, we will periodically place partner update training and/or required certification maintenance training and exam packages on your transcript. You will be notified via email of the availability of these packages. We will send periodic reminders up to the due date for all certification maintenance exam requirements.

Certification maintenance: After initial certification, an annual renewal is due to maintain this certification. Certification maintenance packages will be placed on your transcript for completion up to once yearly. We will notify you of the requirements and send periodic reminders up to the due date via email.

Visit www.sageu.com to take your assessment.

Lesson 1 – Sage Provisioning Portal

Learning Outcomes

This lesson provides an overview of the Sage Provisioning Portal, including an explanation about the basic screen elements, and how user accounts are linked to one or more user roles which define access rights to the Portal features and information.

Learning Objectives

After completing this lesson, you will be able to:

A. Explain what the Sage Provisioning Portal is
B. Explain the three types of organizations in the Portal
C. Explain the hierarchy of elements in the Portal and how they work together
D. Explain the basic screen elements
E. Explain the user roles

About Sage Provisioning Portal

The Sage Provisioning Portal is the tool you use to manage online subscriptions and services for Sage products, on the Sage Partner Cloud. The products are deployed on sites in the Portal. When a customer orders a new subscription to a product, you must provision a new site with the required product parts, licenses, and entitlements to match the order.

There are three types of organization in the Portal: operating company, partner, and customer.

Each organization contains users with assigned roles. The data and functionality that each user can access depends on the operating company, the product deployed on the site, the status of the site, and the role assigned to the user's Portal account.

Users with appropriate rights can create new sites and manage existing sites and products from the Portal. This includes adding and removing Portal users, uploading bacpacs, and creating backups.

Hierarchy of Elements in the Portal

There is only one Sage Provisioning Portal URL: https://www.sageerponlineservices.com/

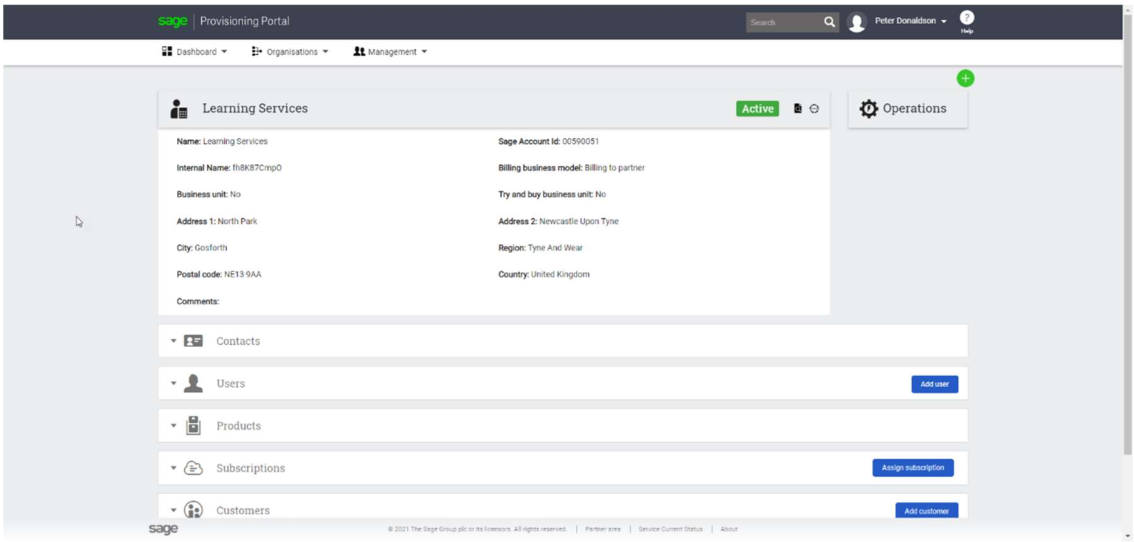
The information available on the Sage Provisioning Portal differs based on roles. For example, the Sage Operator sees more than a Partner Operator, and a Customer Operations Agent can only see their own customer/site record.

The process flow shown below explains the hierarchy of elements in the Sage Provisioning Portal, and how the Sage Operator, Partner Operator, Customer Operations Agent, and Users work together.

Basic Screen Elements

Each screen in the Portal has several tool bars and a main work area where information is displayed.

You can find below a full explanation of each of the options available in the Sage Provisioning Portal.



Sage Provisioning Portal logo

Click to return to your default screen from anywhere in the Portal. If you can access more than one site, your default screen is the Site Summary screen. If you can access one site only, your default screen is the Site Details screen.

Search

Enter keywords and click the Search icon to list all Sage Provisioning Portal records containing the keywords.

My Profile

Displays your roles, the date of your previous log in, and the log out link.

Help

Opens context sensitive help.

Dashboard

Expands a drop-down menu that opens operation, and site dashboards. Dashboards provide an overview and a set of shortcuts for you to perform activities.

Site Dashboard: The Site dashboard allows you to view site information, export site information, add a site, work with bacpacs, assign a user to a site, unassign a user from a site, set site administration rights, amend a site, and change the status of a site.

To display the Site Details screens, click on a site Name. Detailed information about the site is displayed.

There are several sections on this screen. Site header, Operations, Infrastructure, Database servers, Databases, Users, and the Modules panel.

Site header

Provides detailed information about the site.

Operations

The Operations that are available depend on the current screen in the portal, your user role, and the product deployed on the site. Some options available are Amend, Repair, Restore, Suspend, Lock, Backup, Bacpacs, and Change VM size.

The table below shows the operations available and the state of the VM + data disks and Databases.

SPP Operation	Sage 300		Sage 100	Site status when completed	Rollback operation
	VM + data disk	DBs	VM + data disk		
Suspend	stop	no action	stop	Suspended	Resume
Resume	start	no action	start	Ready	-
Shelve	no action because the vm is already stopped	export DBs as bacpac files and delete DBs from SQL Server	no action	Shelved	Unshelve
Unshelve	no action	Create SQL Server databases from bacpac files	no action	Suspended	-
Delete	delete	no action	delete	-	-
Lock	no action	no action	no action	Locked	-
Unlock	no action	no action	no action	Ready	-

The process to delete a Site is: Ready > Suspended > Shelved > Deleted

A Suspended Site displays *Restore, Resume and Shelve* operations.

A Shelved Site displays *Unshelve and Delete* operations.

A Fault Site displays the *Repair* operation.

A Pending Acceptance site displays the *Delete* operation.

Infrastructure Panel

Displays the Azure subscription Id, Storage account name, Internal name, Virtual machine name and Virtual machine size.

Database servers Panel

The Database servers panel displays the Azure SQL server name, the number of databases, Logins, Type, and the status of the database.

Sage Provisioning Portal

Databases Panel

Displays the name of the company, the name of the database, the Azure tier used for the database, current size percentage, the amount of used space and the total amount of space on the database, and the Actions available for the database.

Actions Field

Backup: The Backup icon performs a manual backup,

Restore: The Restore icon restores a database backup,

Connection string: The Connection String icon gets the connection string of the database,

Delete Database: The Delete Database icon deletes a database.

Users Panel

Displays the user's last name and first name, the user's email address, and the role assigned to the user.

It also displays the Status of the user. An Inactive status is a newly created user. Active indicates a user with a registered Sage ID account and Active (Locked) is a registered locked user.

The Assignment status can be Assigned which indicates that the user is assigned and can access the site or Failed where the process of assigning or unassigning the user has failed.

The Actions available are Lock or Unassign a user from the site.

The Assign accountant option allows an accountant to access the product deployed on a customer's site. The accountant cannot log in to Sage Provisioning Portal. You can assign an accountant to a site that has a Ready status.

The Assign User option allows you to assign an existing, active portal user to a site that has a Ready status.

Modules Panel

Displays the product parts that are deployed on the site. The product parts that are available depend on the product.

The Amount field displays the number of licenses for each product part and the capacity for the database. For some product parts, you cannot specify an amount.

Organisations

Expands a drop-down menu that opens a list of Users, Customers, and Partners. You can use the Organisations menu to select and manage an organisation type.

Users: From the User Summary screen, you can view user information, add a user, register a user, edit a user, lock, and unlock a user, and delete a user.

Customers: From the Customer summary screen, you can view customer information, add a customer, register a customer, edit a customer, lock, and unlock a customer, and delete a customer.

The Actions available are Audits and Processes.

To display the Customer Details screen , click on a Customer Name. Detailed information about the customer is displayed. There are several sections on this screen. Customer header, Operations, Customer data, Contacts data, Sites, and Users.

Partners: From the Partner Summary screen you can view partner information, add a partner, edit a partner, lock, and unlock a partner, and delete a partner.

To display the Partner Details screen, click on a Partner Name. There are several sections on this screen. Partner header, Operations, Contacts, Users, Products, Subscriptions, and Customers.

Management

Expands a drop-down menu that displays audits and product terms and conditions.

Quick Actions

Add Customer: Opens the New customer wizard. You must have rights to view this option.

Add Partner: Opens the New partner wizard. You must have rights to view this option.

Work Area

Displays Portal information. To view information in a section, click the Expand icon. To change the order in which information is displayed, click the arrow in the relevant column heading. To search for specific items, click the Filter icon in the relevant column heading, enter search words, and click Filter. To move between pages of results, click the navigation buttons at the bottom of the work area.

Footer

The information displayed here depends on the operating company.

Info Legal: Displays legal information.

Disclaimer: Displays disclaimer.

Partner Area: Opens your Sage Account Area log on page.

Service Current Status: Displays the status of the product.

Sage Provisioning Portal

Service Availability: Displays information about the service availability.

About: Displays the version number and the publication date of Sage Provisioning Portal.

User Roles

Sage Provisioning Portal user accounts are assigned one or more user roles. These roles determine what the users can access in the Portal. Menu options, buttons, and information are available based on the user's role.

To view the roles assigned to your account, click your name in the top-right corner of the page.

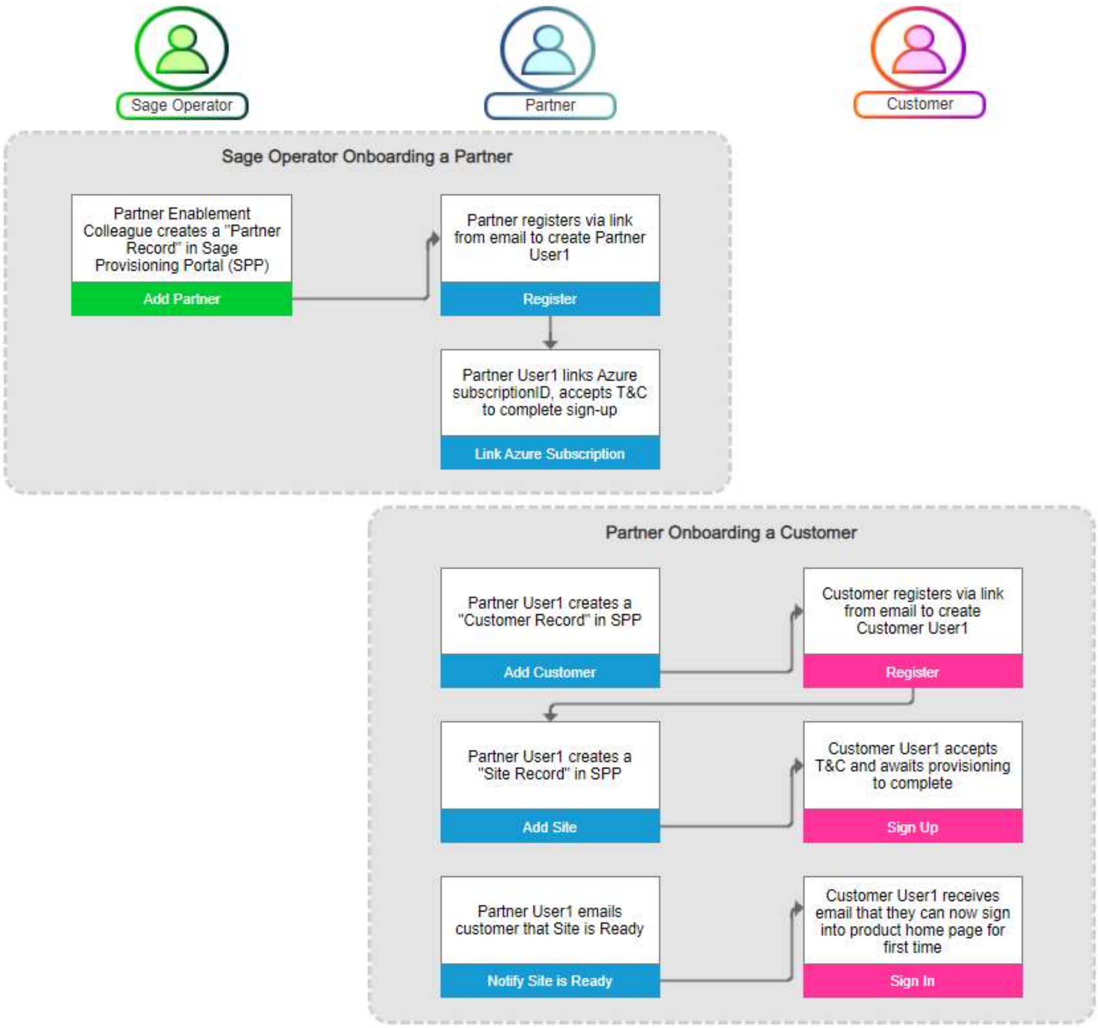
The table below describes each user role.

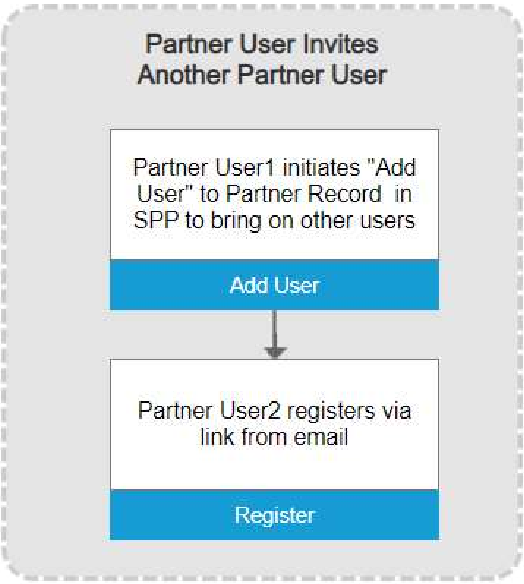
Role	What you can do in Sage Provisioning Portal
Sage Operations Agent	You are a Sage employee, fulfilling a particular Sage role in using the Portal.
Partner Administrator	You are an administrator user with the channel partner organization who performs billing and back office activities.
Partner Operations Agent	You are a channel partner employee who performs operational tasks for a customer, for example, create a backup or create a site.
Partner Support Agent	You are a channel partner employee who performs support activities for a customer, for example, review logs and answer billing queries. You have a high level of IT expertise and experience of on-premise deployments on customer sites.
Customer Administrator	You are an administrator user within the customer's organization.
Customer Operations Agent	You are a customer user who operates and manages users, version, and site credentials.
Customer User	You are a customer user who fulfils a function in the customer's organization, for example sales clerk.

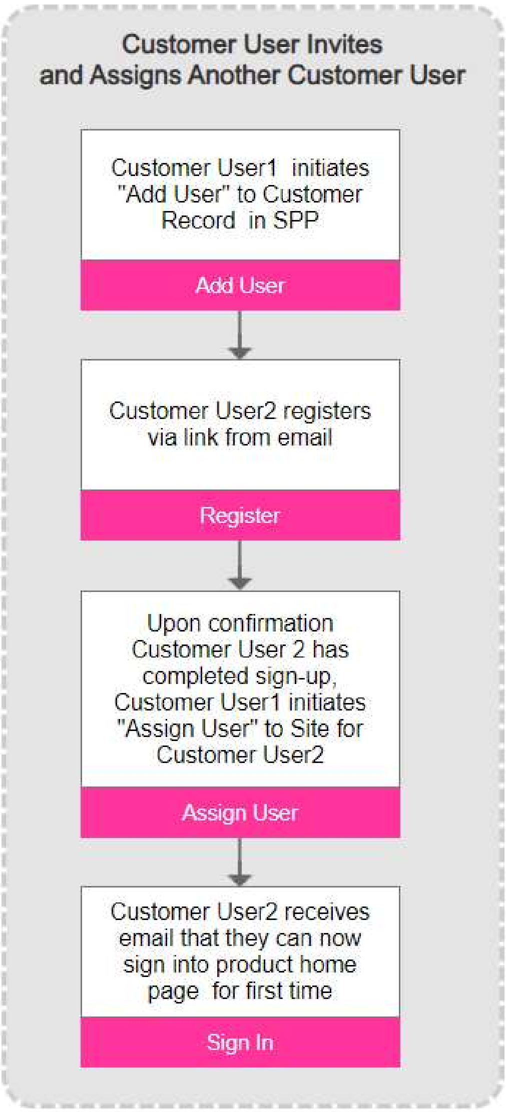
Sage Provisioning Portal

Onboarding and User Assignment Workflows

The process flow shown below explains the onboarding and user assignment, for the Sage Partner Cloud solution.




Partner User Invites
Another Partner User
Partner User1 initiates "Add User" to Partner Record in SPP to bring on other users
Add User
Partner User2 registers via link from email
Register


Customer User Invites
and Assigns Another Customer User
Customer User1 initiates "Add User" to Customer Record in SPP
Add User
Customer User2 registers via link from email
Register
Upon confirmation Customer User 2 has completed sign-up, Customer User1 initiates "Assign User" to Site for Customer User2
Assign User
Customer User2 receives email that they can now sign into product home page for first time
Sign In

Check Your Knowledge

Answer the following questions about the material covered in this lesson.

Short Answer
Write a short answer to the questions below.

1. What are the three types of organization in the Portal?

____

____

2. What is the process flow for the hierarchy of elements in the Sage Provisioning Portal?

____

____

Multiple Choice
Mark the correct answer(s) to the question below.

3. What icon do you select to add a new customer in the Sage Provisioning Portal?
   - A. _____ Add partner
   - B. _____ Add site
   - C. _____ Add user
   - D. _____ Add customer

Summary

Sage Provisioning Portal is the interface you use to manage online subscriptions and services for Sage products. The products are deployed on sites in the Portal.

When a customer orders a new subscription to a product, you must provision a new site with the required product parts, licenses, and entitlements to match the order.

There are three types of organization in the Portal: operating company, partner, and customer.

Sage Provisioning Portal user accounts are linked to one or more user roles which define access rights to the Portal features and information.

Menu options, buttons, and information are displayed or hidden according to user roles. To view the roles assigned to your account, click your name in the top-right corner of the page. To view user roles assigned to another user, select Organisation, Users and then click the User Name.

End of Lesson

Lesson 2 – Onboarding to Sage Partner Cloud

Once a Partner requests access to participate in the Sage Partner Cloud through the Sage Provisioning Portal Service, a Sage Operator will start the Partner onboarding process.

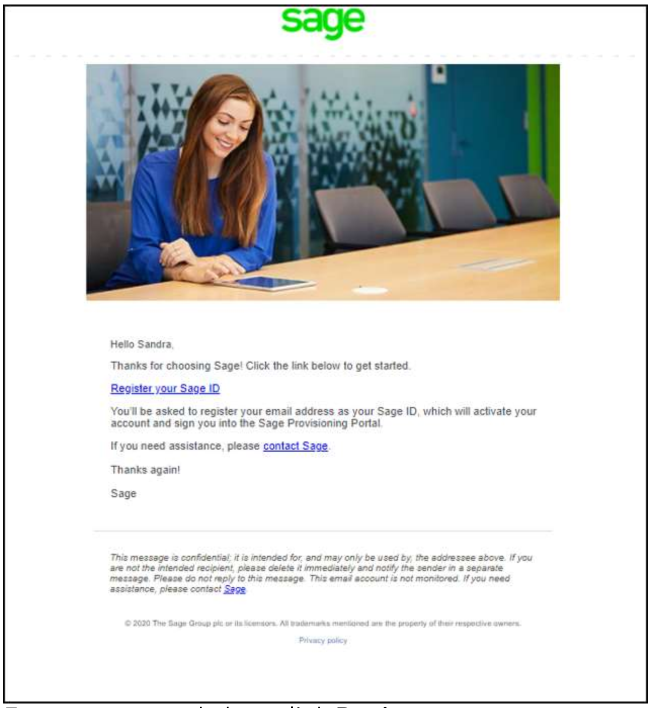
- A Sage Operator will send a communication with links to Sage University for required training, as well as the Sage Partner Cloud Agreement.
- The Sage Operator will verify that the Sage Partner Cloud Certified Consultant training has been completed, and the Sage Partner Cloud Agreement has been submitted.
- Once the Sage Operator creates the account an invitation to register is sent to the Partner contact, who must read and agree to the Sage Provisioning Portal Service, Terms & Conditions upon their first log on.

Important Information

A new Sage Account is created using the email address provided during sign up.

Once the Sage Operator has entered the partner information in the Sage Provisioning Portal, a Sage Account Registration email is sent to the partner. The email will come to the same email address you gave during sign up and this email will not change, since it is used to create your account.

1. Click the "Register your Sage Account" link to register a Sage account. *Sage Account is formerly known as Sage ID.*



Hello Sandra,

Thanks for choosing Sage! Click the link below to get started.

Register your Sage ID

You'll be asked to register your email address as your Sage ID, which will activate your account and sign you into the Sage Provisioning Portal.

If you need assistance, please contact Sage.

Thanks again!

Sage

This message is confidential; it is intended for, and may only be used by, the addressee above. If you are not the intended recipient, please delete it immediately and notify the sender in a separate message. Please do not reply to this message. This email account is not monitored. If you need assistance, please contact Sage.

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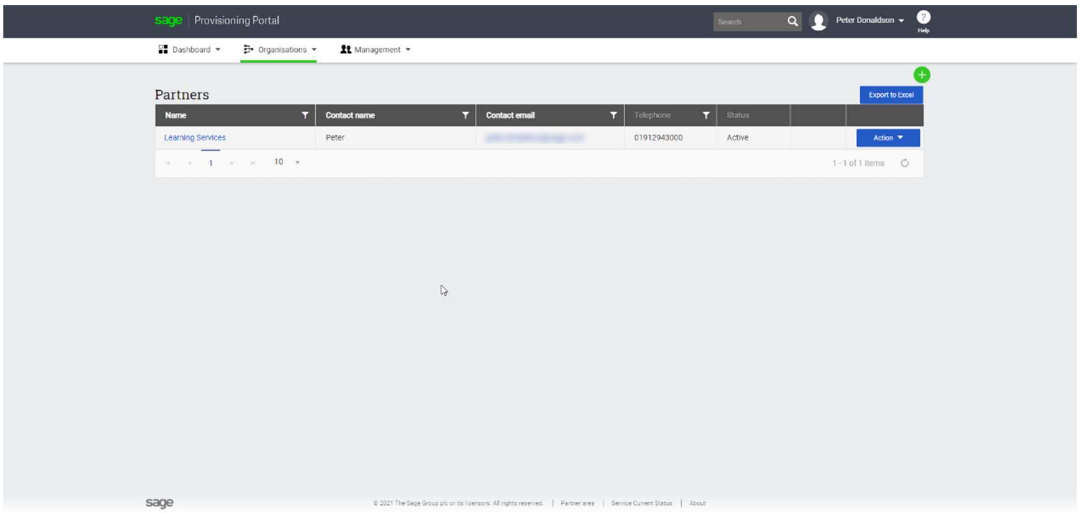
Privacy policy

2. Enter a password, then click Register.

Important Note

If a partner already has a Sage Account, they will register their existing Sage Account to this service. This is the same Sage Account used for Sage Partner Hub or Sage City.

3. You will receive a Verification Code that is sent to your email.
4. Enter the Sage Account Verification Code, then click Continue.
5. Upon completing the Sage Account registration, you will be redirected onto the Sage Provisioning Portal.



6. You will receive an email confirming that your Sage Account has been registered.

Important Note

You can add another level of security for your Sage Account by setting up two-factor identification. Sign in with your Sage Account, click Manage Account, and in the Two-Factor Authentication area, click Add. Follow the on-screen steps. See the Appendix for additional information on the Two-factor Identification.

Adding Products to a Partner

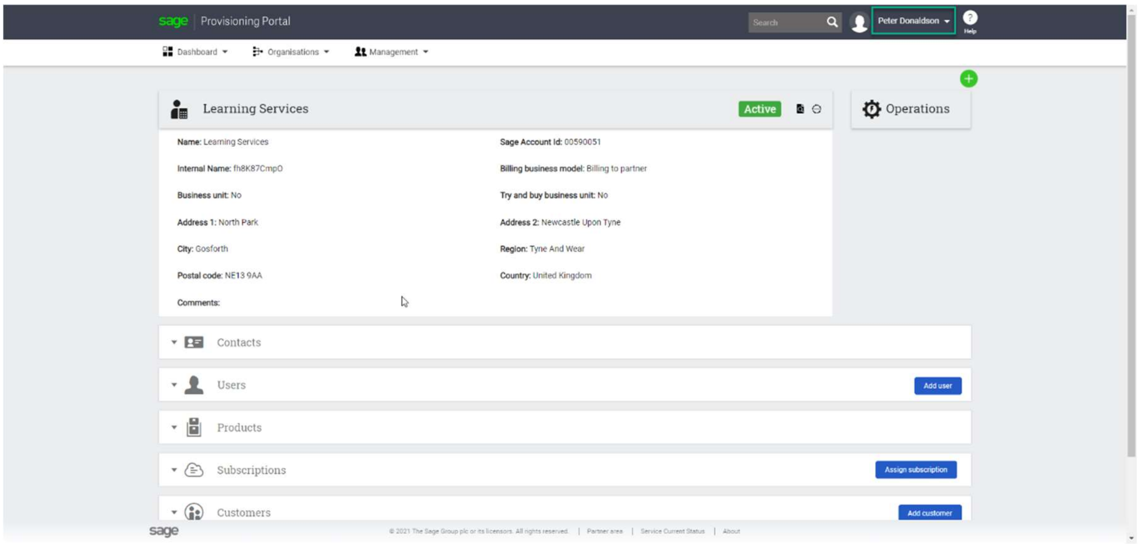
Partners can manage several products in the Sage Provisioning Portal. Before creating sites for customers, they need to be added to the partner record. The Sage Operator will assign the products that the partner is authorised for.

Accessing the Portal

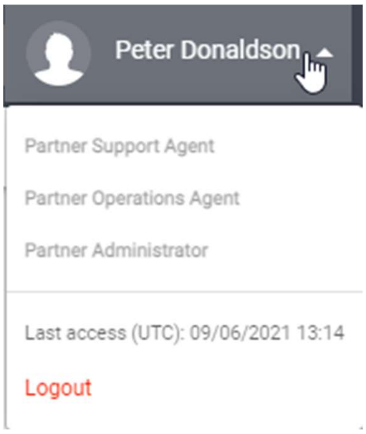
Partner Operator

You can access the Sage Provisioning Portal through the following URL:
https://www.sageerponlineservices.com/

Now that you have accessed the Sage Provisioning Portal, you can view the user roles assigned to your account.



To view user roles assigned to your account, click your name in the top-right corner of the page. The roles are listed below your name. To view user roles assigned to another user, select **Organisations, Users** and then click the User **Name.**



Check Your Knowledge

Answer the following questions about the material covered in this lesson.

Short Answer

Write a short answer to the question below.

1. What are the two ways to access the Sage Provisioning Portal?

____

____

Multiple Choice

Mark the correct answer(s) to the question below.

2. What information is used to create a new Sage ID?
   - A. _____ Address
   - B. _____ Email
   - C. _____ Name
   - D. _____ Region

Summary

There are several steps to complete before you can start using the solution.

1. The Partner completes the onboarding process for the Sage Partner Cloud solution.
2. The Sage Operator creates the account for a partner.
3. Once the Sage Operator has entered the partner information in the Sage Provisioning Portal, a Sage ID Registration email is sent to the partner.
4. After completing the Sage Account registration, the partner will be redirected onto the Sage Provisioning Portal.
5. Once the site is created by the Sage Operator, the partner will receive an email confirming that their Sage Account has been registered.
6. The Sage Operator will then assign products to the partner.

You can access the Sage Provisioning Portal through the following URL:
https://www.sageerponlineservices.com/

End of Lesson

Lesson 3 – Partner Operator: Setting up Subscriptions

Learning Outcomes

This lesson explains how to assign an Azure subscription to your partner account, and how to set it up to make it available for site provisioning.

It is essential that, before you continue, you fully read and understand our article on AVD License Price Per User Access Plan Pricing here…
https://gb-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=210928085359643

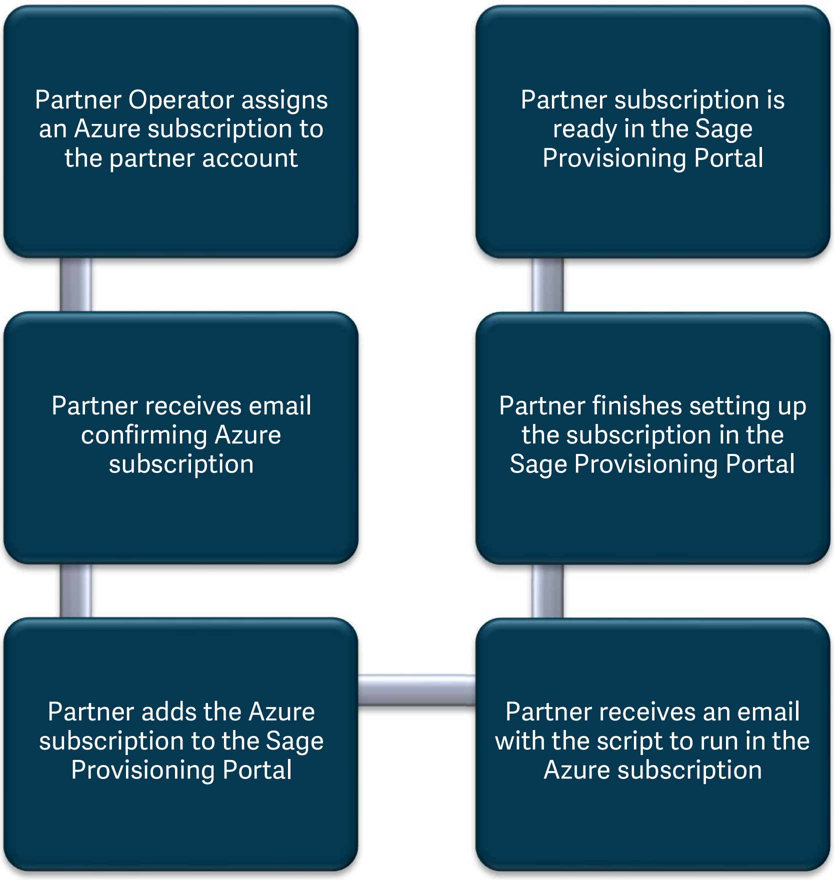
Learning Objectives

After completing this lesson, you will be able to:

A. Explain how to assign an Azure subscription to your partner account
B. Explain how to make the Azure subscription available for site provisioning

Setup Process

You can follow the process flow shown below when setting up an Azure subscription.



Subscriptions

You can find below a full explanation of each of the options available under the Subscriptions panel.

Azure subscription Id : Your Azure subscription ID.

Name: A name to identify the subscription.

Organisation: Partner or customer name.

Region: The area in which the resources will be deployed.

Status:

- Assigning: Assigning the subscription in the Sage Provisioning Portal.
- Pending Setup: Subscription assigned to the Sage Provisioning Portal, but not configured yet.
- Setting up: Subscription setup is on going.
- Ready: The subscription is ready to be used.
- Fault: Error when executing the Sage Provisioning Portal configuration.
- Locking: Subscription in the process of lock.
- Locked: Subscription not available for new site creation.
- Unlocking: Subscription in the process of unlock.
- Unassigning: Subscription in the process being unassigned from Sage Provisioning Portal.
- Unassigned fault: The unassigned process has failed.

Actions:

- Assign subscription: Assign a partner Azure subscription.
- Download subscription files: Click to download the configuration files.
- Setup subscription: Click to execute Sage Provisioning Portal setup on the subscription.
- Lock Subscription: Click to lock the subscription. It is not visible when creating a site.
- Unlock: Click to unlock the subscription.
- View Logs: Displays the logs for the subscription setup.
- Re-send email: Click to send the email to the partner to download the files.
- Unassign subscription: Click to unassign the subscription.

Partner Operator: Setting up Subscriptions

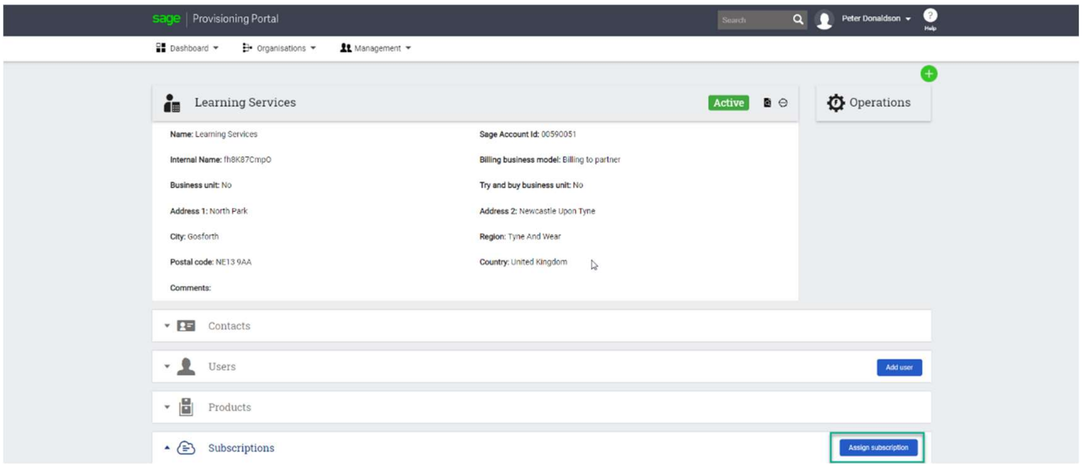
Assigning an Azure Subscription

There are several steps for the Partner Operator to complete to assign an Azure subscription in the Sage Provisioning Portal.

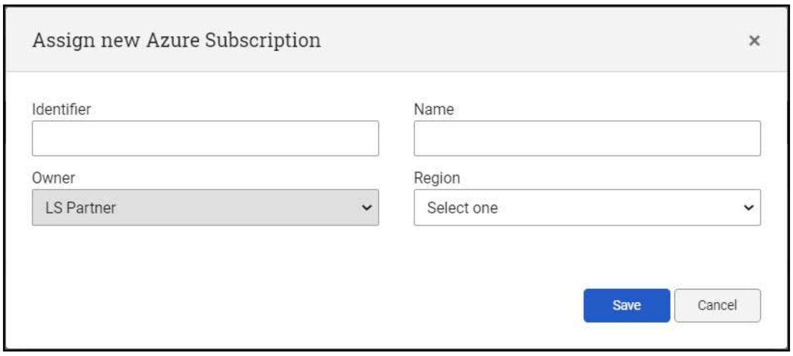
Partner Operator

First, the Partner Operator opens the partner account to assign the Azure subscription.

1. In the **Subscriptions** panel, click the **Assign subscription** option.



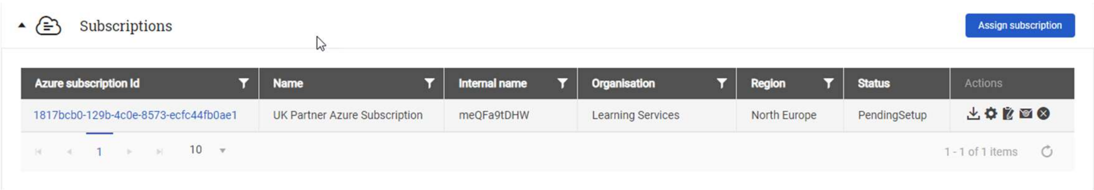
2. In the **Assign new Azure Subscription** screen, enter the **Identifier (Azure Subscription Id)**, **Name**, **Owner**, **Region**, and then click **Save**.



Important Note

The Azure subscription Id is provided by your Microsoft Cloud Solution Provider (CSP).

3. The new subscription now appears under the **Subscriptions** panel, with a **Pending Setup** status. Check your email for further instructions.



Steps to Setup an Azure Subscription

You must follow these steps to setup an Azure Subscription:

1. Download the required file (PowerShell script) from the email received or through the Sage Provisioning Portal.
2. Confirm that you have read how to configure the subscription information.
3. Save a copy of the ConfigureSageADIdentityzip file on your computer.
4. Execute the files to setup the subscription. You will run PowerShell scripts through the Azure Cloud Shell.
5. Set up the subscription in the Sage Provisioning Portal.
6. You will then receive an email informing you that the subscription has been setup, and that you can now access the Sage Provisioning Portal.

Important Information

You must download the required file and confirm that you have read the subscription information before you can proceed to setup the subscription.

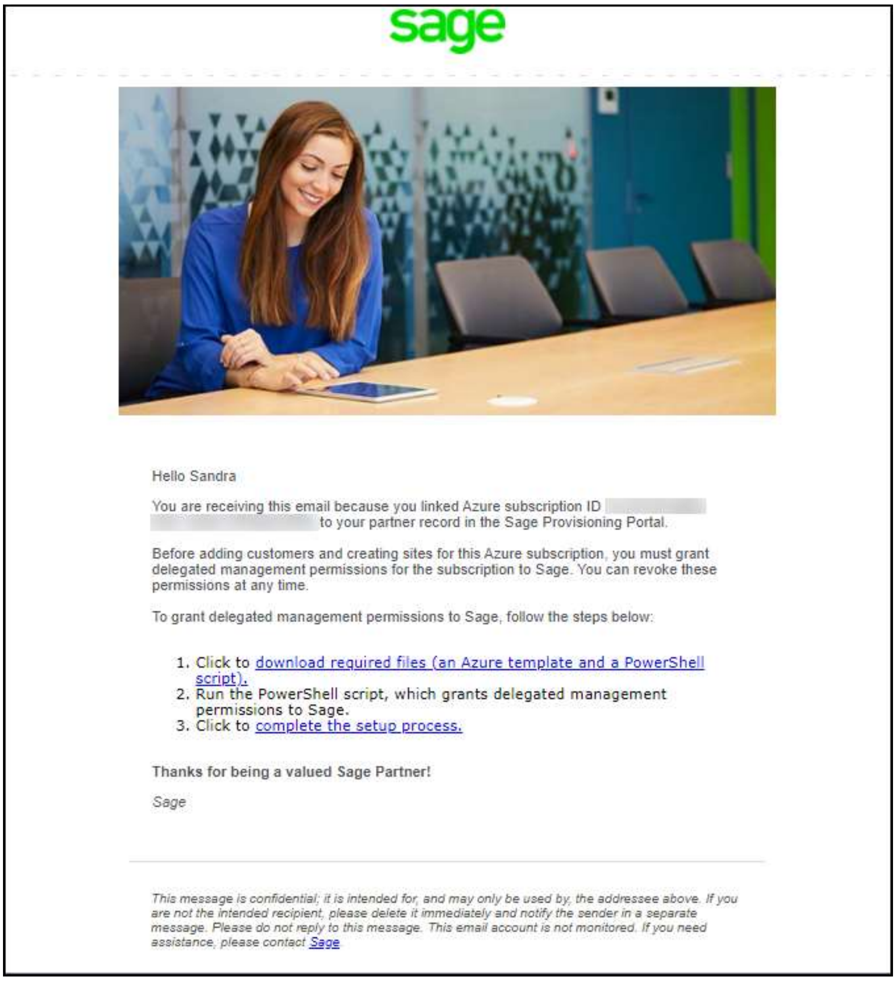
Partner Operator: Setting up Subscriptions

Setting up an Azure Subscription

Partner Operator

Once the Partner Operator has assigned a new subscription to their partner record, an email is sent to the partner with instructions to setup the subscription.

1. Review the steps in the email to grant delegated management permissions for the subscription to Sage, then click the link in step 1.



Hello Sandra

You are receiving this email because you linked Azure subscription ID to your partner record in the Sage Provisioning Portal.

Before adding customers and creating sites for this Azure subscription, you must grant delegated management permissions for the subscription to Sage. You can revoke these permissions at any time.

To grant delegated management permissions to Sage, follow the steps below:

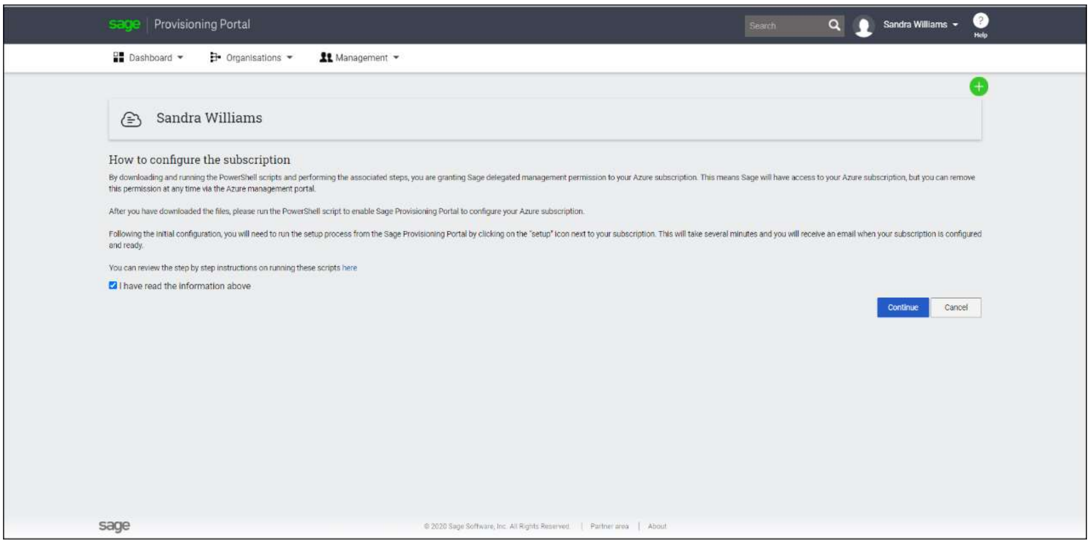
1. Click to download required files (an Azure template and a PowerShell script).
2. Run the PowerShell script, which grants delegated management permissions to Sage.
3. Click to complete the setup process.

Thanks for being a valued Sage Partner!

Sage

This message is confidential; it is intended for, and may only be used by, the addressee above. If you are not the intended recipient, please delete it immediately and notify the sender in a separate message. Please do not reply to this message. This email account is not monitored. If you need assistance, please contact Sage

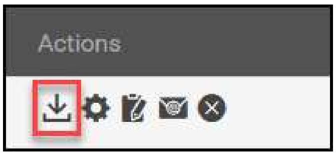
2. Review the How to configure the subscription information, then select I have read the information above. Click Continue.



3. The ConfigureSageADIdentity.zip file will now download. Save a copy of the file on your computer.

Additional Information

You can also download the PowerShell script through the following method: In the Subscriptions panel, go to the Actions column, then click on the Download subscription files icon.



4. Go to the ConfigureSageADIdentity.zip file on your computer and extract the file.

For the next step, you have must execute the files to setup the subscription. You will run the PowerShell script through the Azure Cloud Shell.

Azure Cloud Shell

Azure Cloud Shell is an interactive, authenticated, browser-accessible shell for managing Azure resources. It offers the flexibility of being able to choose the shell experience that best suits the way you work, Bash or PowerShell.

To learn more about Azure Cloud Shell go to:

https://docs.microsoft.com/en-us/azure/cloud-shell/overview?view=azps-4.8.0

Partner Operator: Setting up Subscriptions

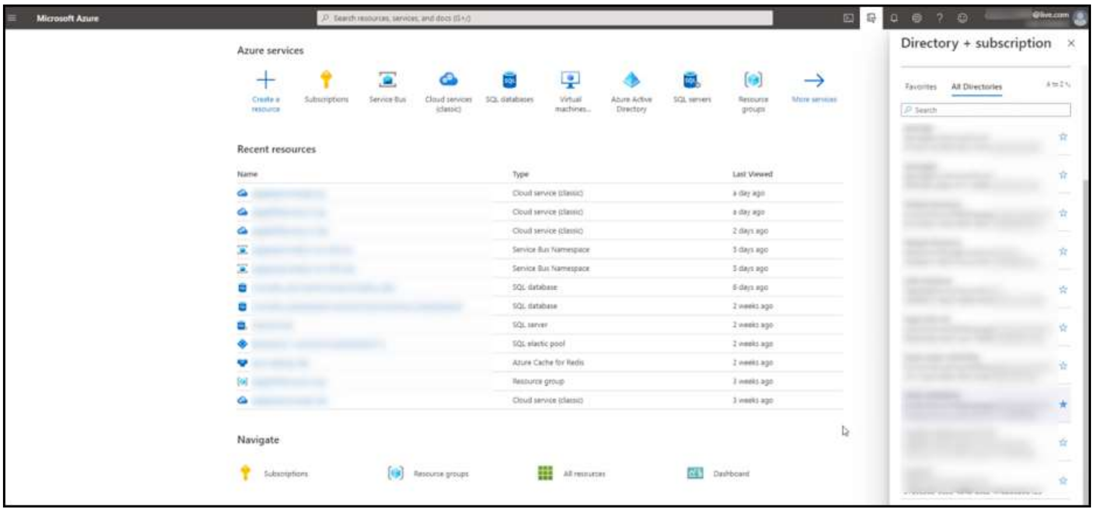
To run the PowerShell scripts through the Cloud Shell, perform the following steps:

1. Go to http://portal.azure.com/
2. Sign in to your **Microsoft Azure** account.

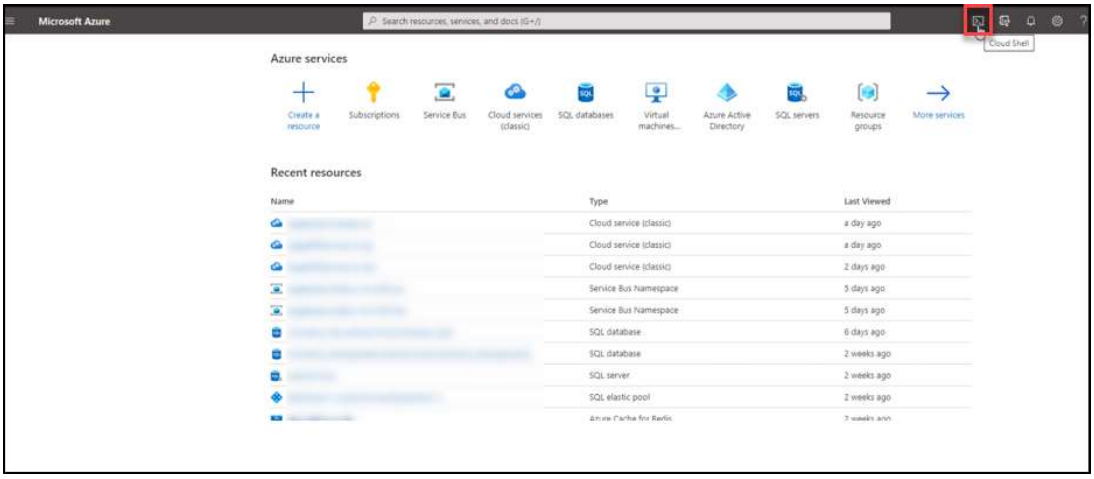
Important Information

You must log in using your Administrator credentials for your Azure subscription.

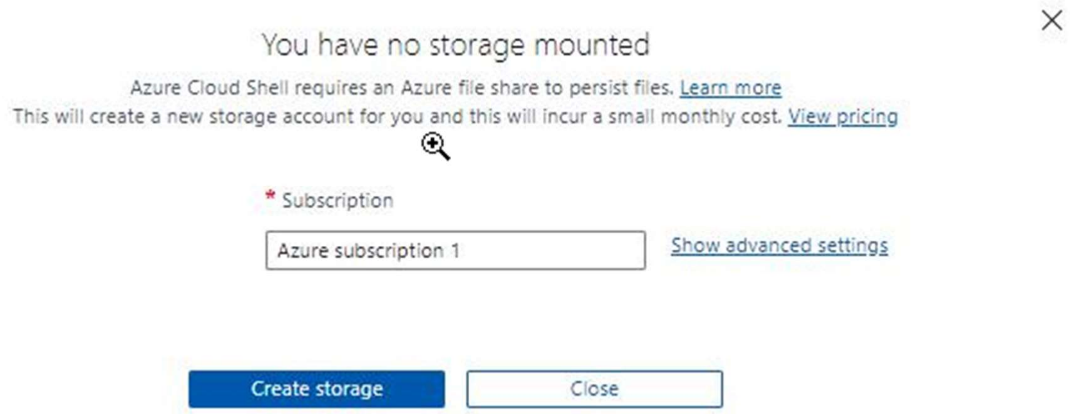
3. Select the **Directory and subscription**.



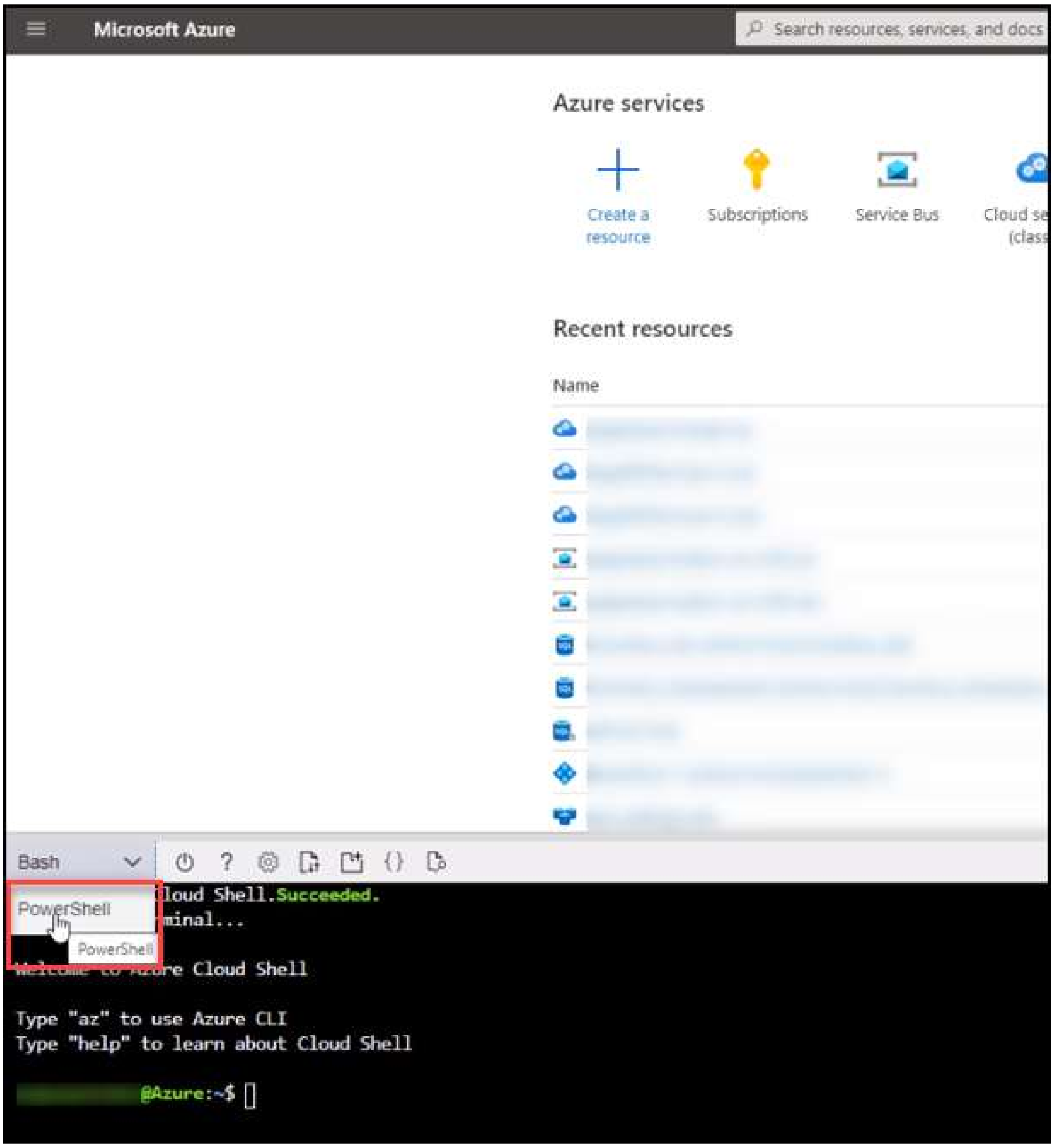
4. Click on the **Cloud Shell** icon.



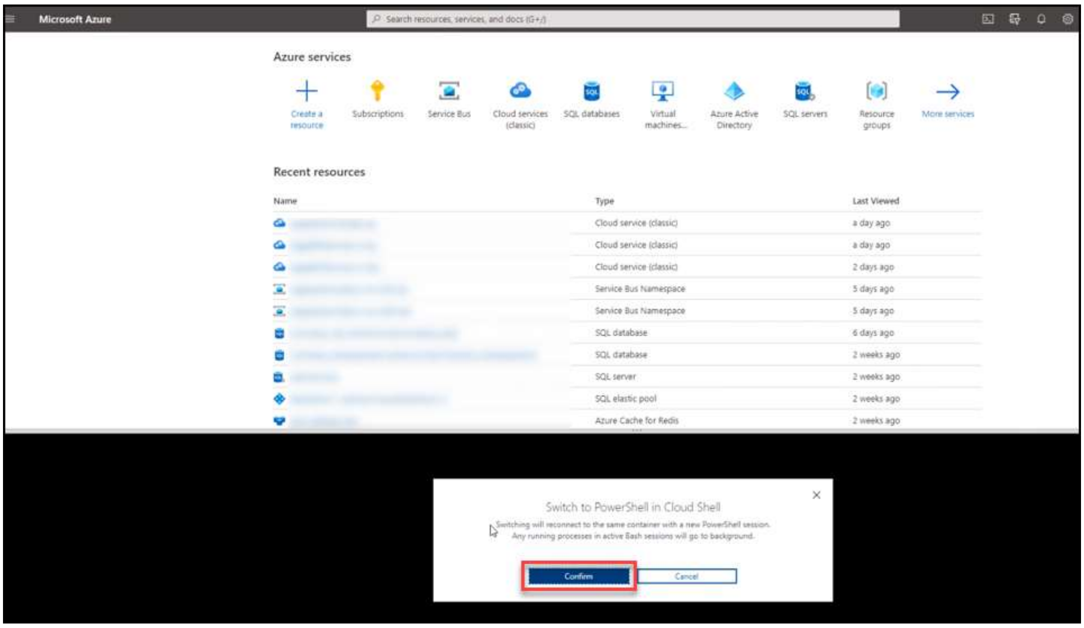
5. If this is the first time you've started Cloud Shell in Azure you will see this screen. Click on 'Create Storage' to continue. Once the process has completed (it may take a few minutes) move on to Step 6.



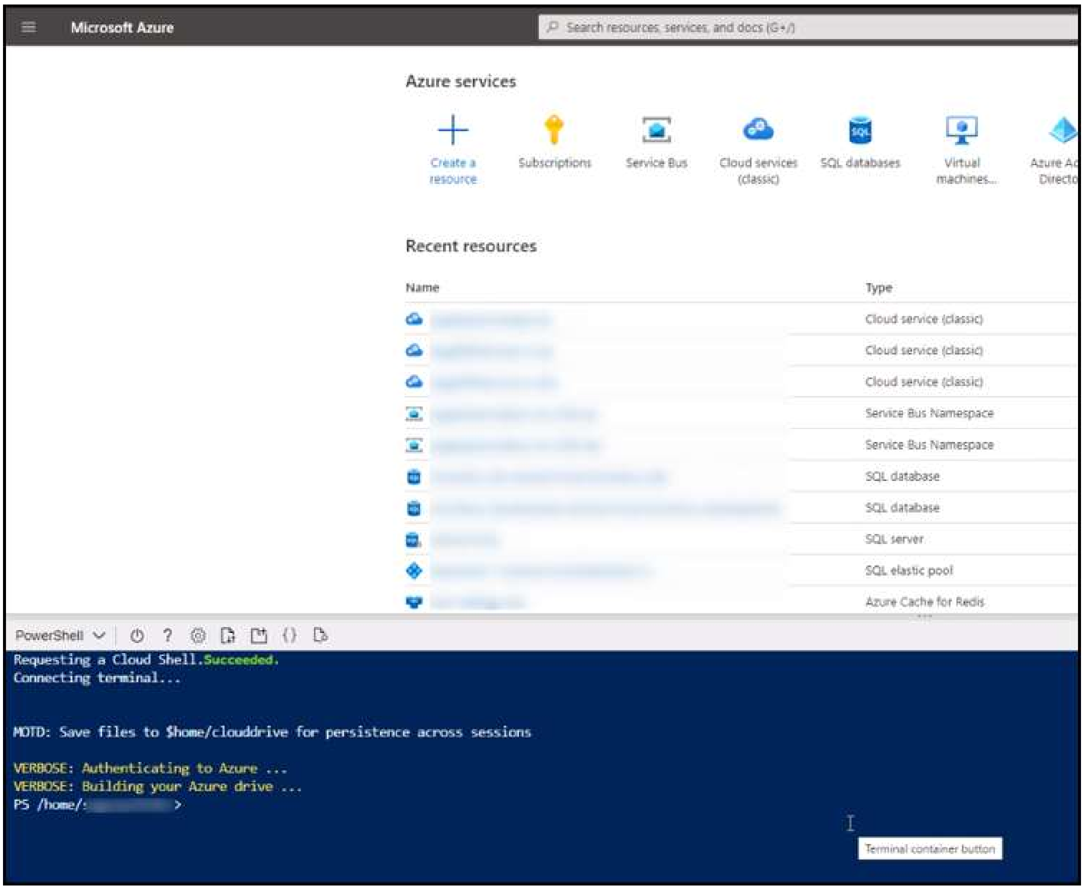
6. From the drop-down menu select **PowerShell**.



7. Click **Confirm**, to Switch to PowerShell in Cloud Shell.

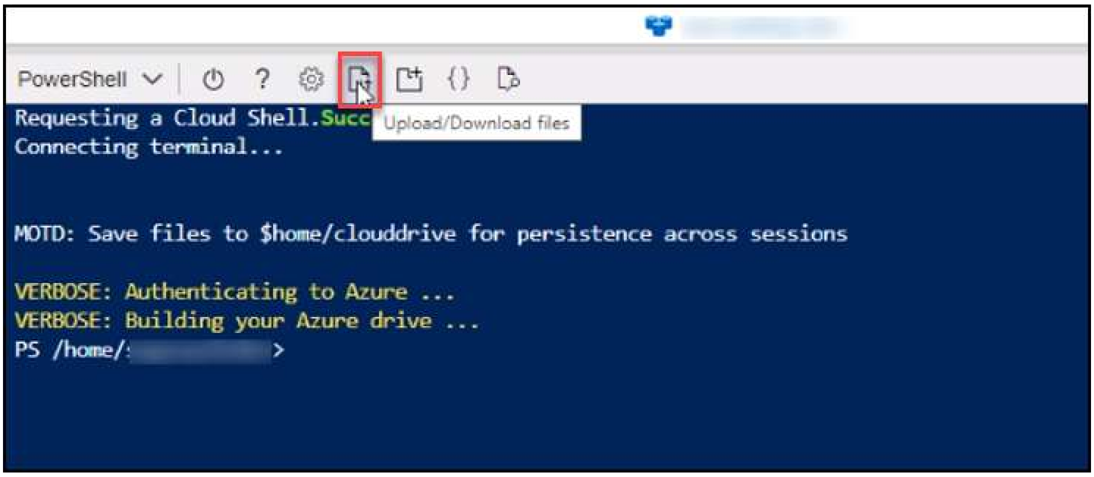


8. A PowerShell command prompt will appear.

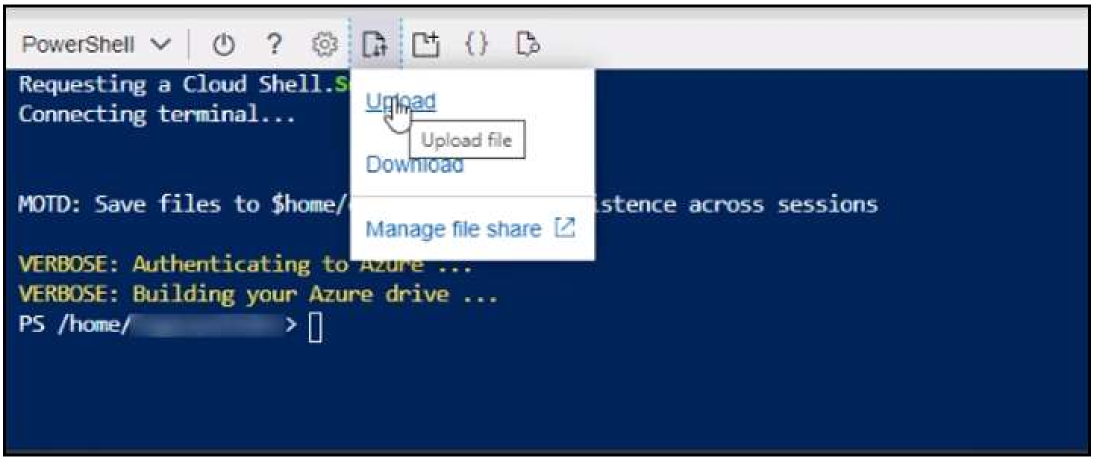


Partner Operator: Setting up Subscriptions

9. Click on the **Upload/Download files** icon.



10. Select the **Upload file** option.



11. Navigate to the downloaded file (previously unzipped) and click Open to upload it.

12. From the command prompt, type dir and hit return to confirm that the file has been uploaded.

13. From the command prompt enter: ./ConfigureSageADIdentity-*subscriptionId*.ps1

    In the file name 'ConfigureSageADIDentity-*subscriptionId*', the subscriptionId will be your Azure subscription ID.

14. Type Y to confirm and continue.

15. After the configuration process is complete you will be returned to a command prompt. At this point, you will also receive your Azure API credentials in the form of the Tenant ID, Client ID and Client Secret. *Make a note of these as you will need them later.*

16. To verify that the scripts ran successfully, login to the Azure Portal then complete the following steps:

    - Click on Azure Active Directory
    - Click on App Registrations
    - Select All Applications

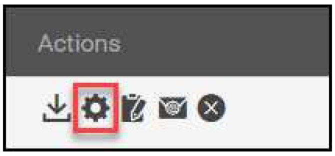
    You should see your Sage application listed here.

Important Information

If the Sage entry is not listed in this window, do not proceed. Please contact support for further instructions.

Once you have run the PowerShell file, you can now setup the subscription in the Sage Provisioning Portal.

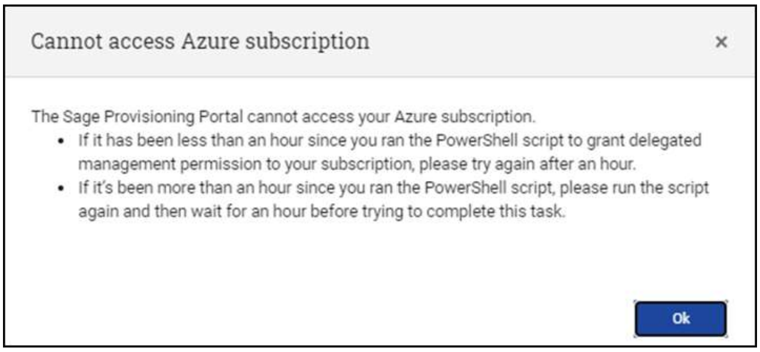
17. In the partner details, go to the Subscriptions panel. Notice that the status is showing Pending Setup for the new subscription.
18. Hover over the Actions column for the new subscription, then click on the Setup Subscription icon.



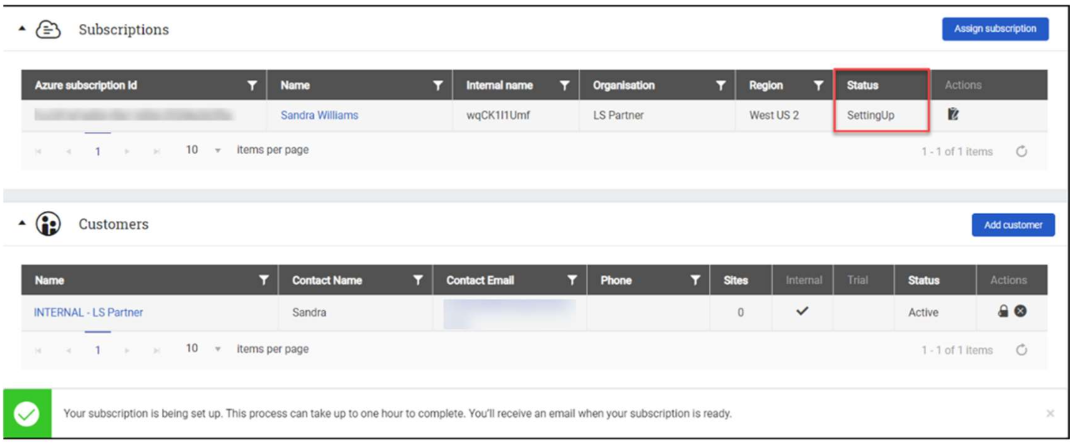
19. Enter your Azure API Credentials, then click Accept.

Important Information

If you have not run the PowerShell script in Azure or you did run the PowerShell script and the subscription is not ready yet, you will then receive the following message.

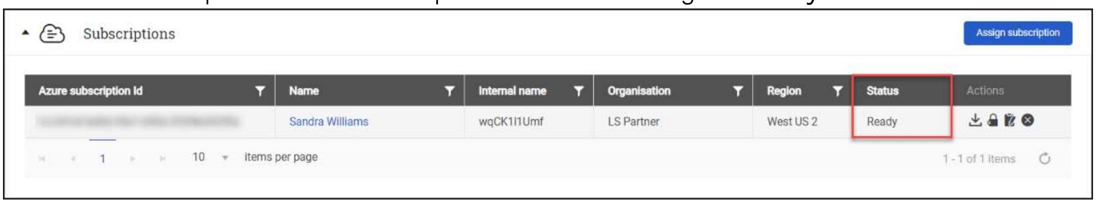


20. You will see that the status has changed to Setting Up. The setup process may take an hour to complete. You will receive an email when your subscription is ready.



21. You can use the **View Logs** icon to display the logs for the subscription setup. This option is useful for troubleshooting setup issues.

22. Once the Subscription has been setup the status will change to Ready.



23. You will then receive an email informing you that the subscription has been setup, and that you can now access the Sage Provisioning Portal to add customers and create sites.

Editing an Azure Subscription

To edit an Azure subscription in the Sage Provisioning Portal:

1. Click on the subscription name to be edited.
2. Enter the new **Name** of the subscription.
3. Click **Save**.
   The Sage Provisioning Portal updates the subscription name in the database.

Check Your Knowledge

Answer the following questions about the material covered in this lesson.

Short Answer
Write a short answer to the question below.

1. What is the first step for setting up an Azure subscription?

Multiple Choice
Mark the correct answer(s) to the question below.

2. What Action can you use to help troubleshoot setup issues?
   - A. _____ View Logs
   - B. _____ Re-send email
   - C. _____ Lock Subscription
   - D. _____ Assign subscription

Summary

There are several steps to complete when setting up an Azure subscription.

1. First, the Partner Operator assigns an Azure subscription to the partner account.
2. The Partner Operator receives an email with instructions to setup the subscription.
3. The Partner Operator accepts the terms and conditions and downloads the PowerShell script file.
4. The Partner Operator runs the script in the Azure subscription.
5. The Partner Operator requests the Sage Provisioning Portal to setup the Azure subscription.
6. The subscription is ready in the Sage Provisioning Portal.

To edit an Azure subscription in the Sage Provisioning Portal, click on the subscription name to be edited. Enter the new Name of the subscription, then click Save.

End of Lesson

Lesson 4 – Partner Operator: Managing Customers

Learning Outcomes

This lesson explains how to add a new customer and new customer site, activate, and invite new users, and will discuss how to access Sage 200 Professional.

Learning Objectives

After completing this lesson, you will be able to:

A. Add a new customer
B. Add a new customer site
C. Add and assign users
D. Open Sage 200 Professional

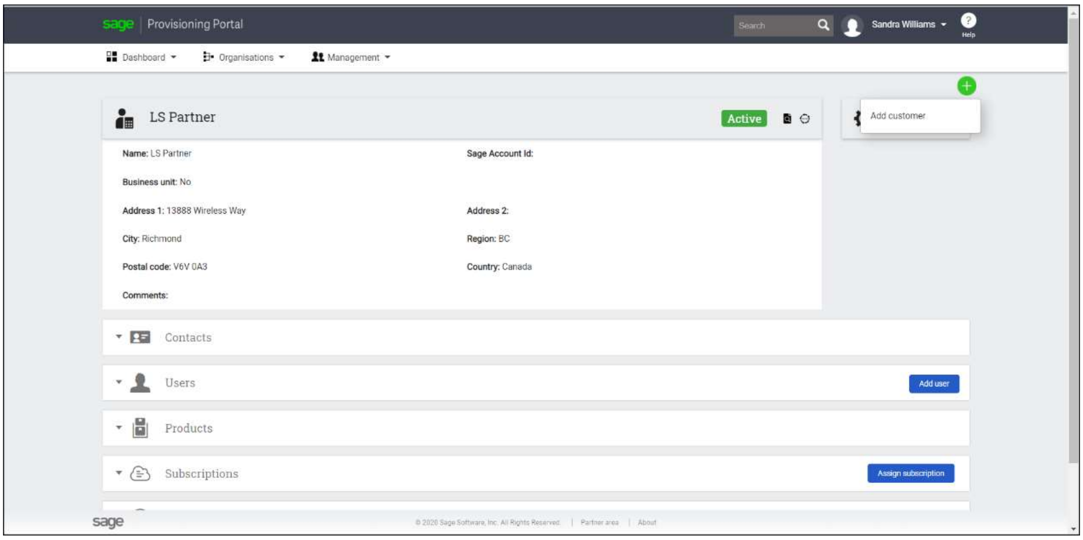
Adding a New Customer

There are several steps to complete before a customer can start using Sage 200.

Partner Operator

First, the Partner Operator creates the account for a new customer.

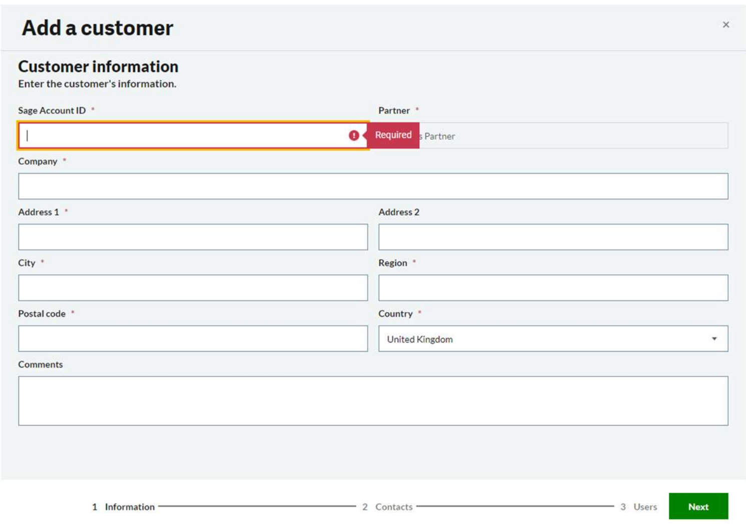
1. From the **Quick Actions** option, click **Add customer**.



Additional Information

You can also add a new customer through the following method: In the Customers section, click the Add customer icon.

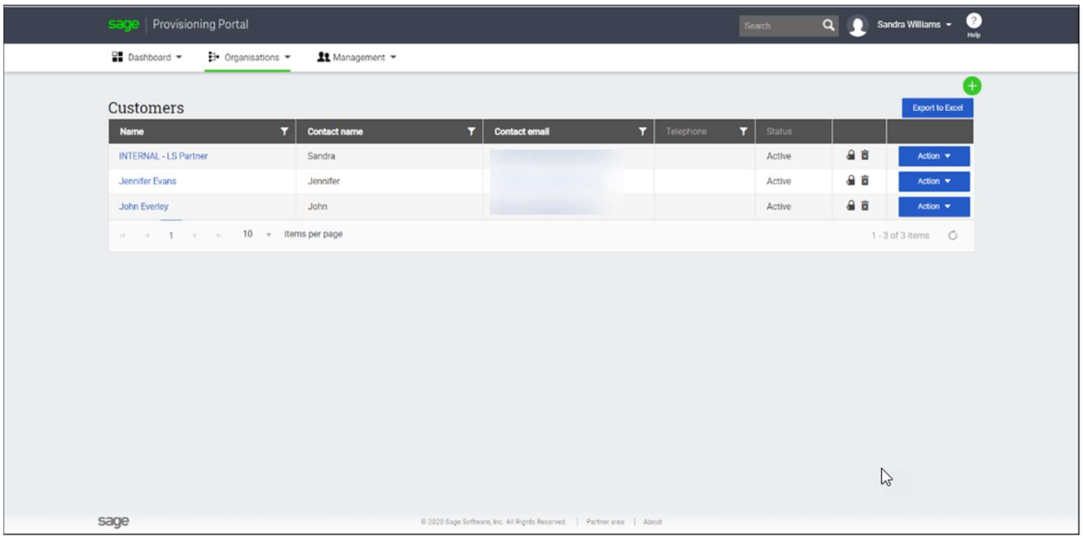
2. Enter the customer details in the **New Customer** wizard, then click **Finish**.



Important Information

A new Sage Account is created using the email address provided.

3. A new customer record is now created.



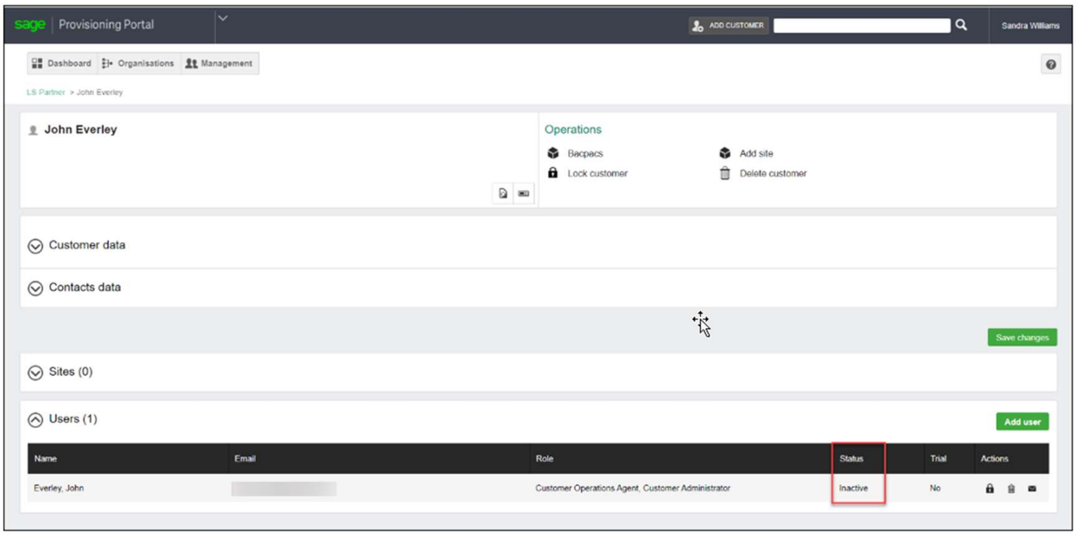
4. Once the Partner Operator has entered the customer information in the Sage Provisioning Portal, a Sage Account Registration email is sent to the customer. The email will come to the same email address the customer gave during sign up and this email will not change, since it is used to create the customer account.

Important Information

If the customer has not received the Sage Account registration email, a partner can resend another email. From the customer profile, scroll down to the Users panel, then under the Actions heading click on the mail icon.

Partner Operator: Managing Customers

5. To view the status of the customer, click on the customer account details, then scroll down to the **Users** panel. The status will show **Inactive** until the customer has registered for a Sage Account.



For the customer to start using the solution, they will need to go through a few steps to get the process going.

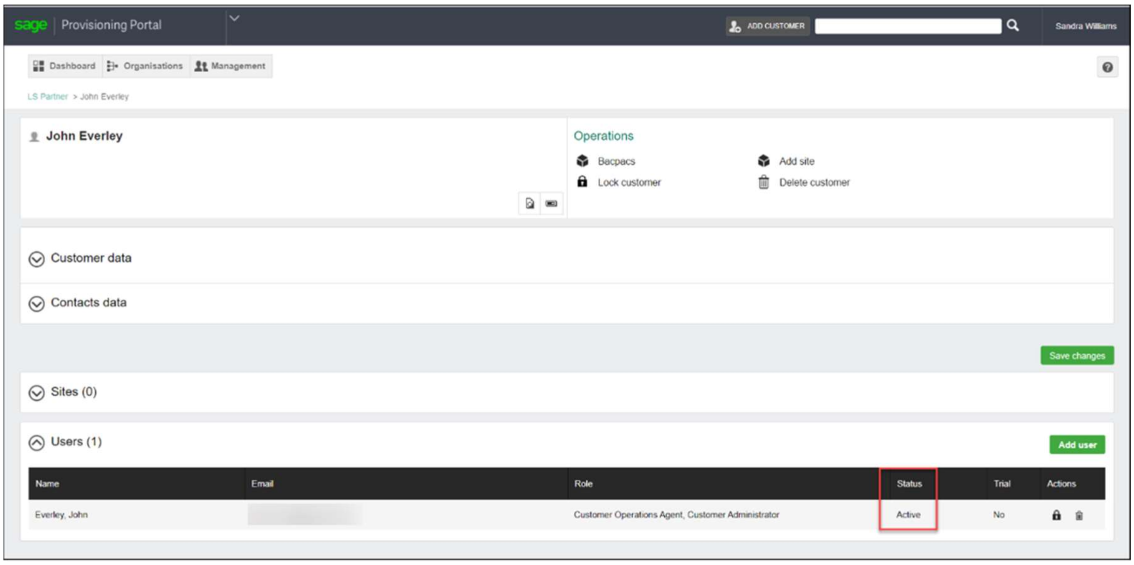
1. The customer will receive an email containing a link to register their Sage Account.
2. Click the link, create a password when prompted then click Register.

Important Information

If a customer already has a Sage Account, they will register their existing Sage Account to this service.

3. The customer will then receive a **Verification Code** that is sent to their email.
4. They enter the **Sage Account Verification Code**, then click **Continue**.
5. Upon completing the Sage Account registration, they will be redirected onto the Sage Provisioning Portal. The site is currently being worked on by the Partner Operator. Check your email for further instructions.
6. They will receive an email informing them that their Sage Account has been registered, and that they can sign into the portal / Sage 200 application once it has been set up.

To view the status of the customer once they have registered, click the refresh button on your browser, then scroll down to the **Users** panel. The status will show **Active** when the customer's Sage Account has been registered. A new site can now be created for the customer.

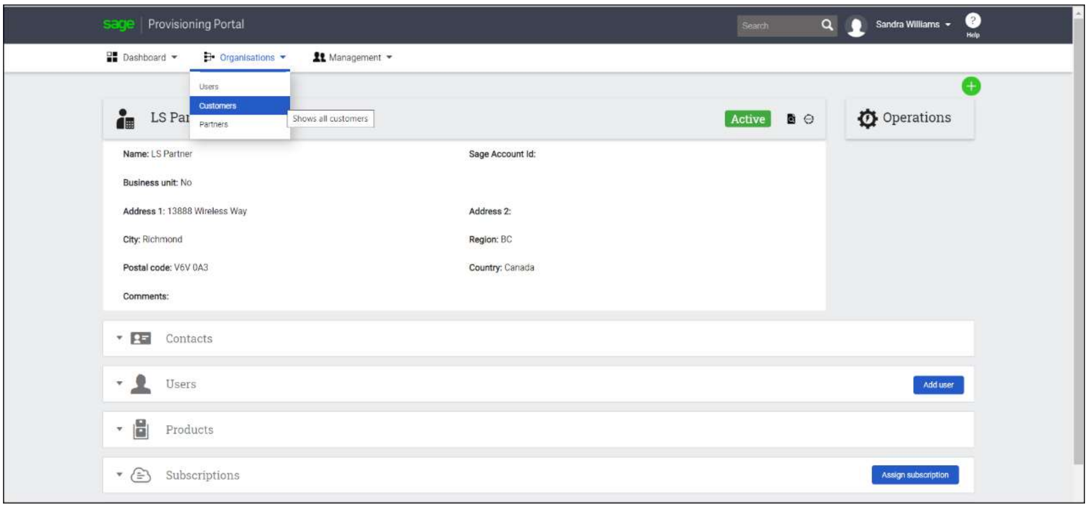


Adding a New Customer Site

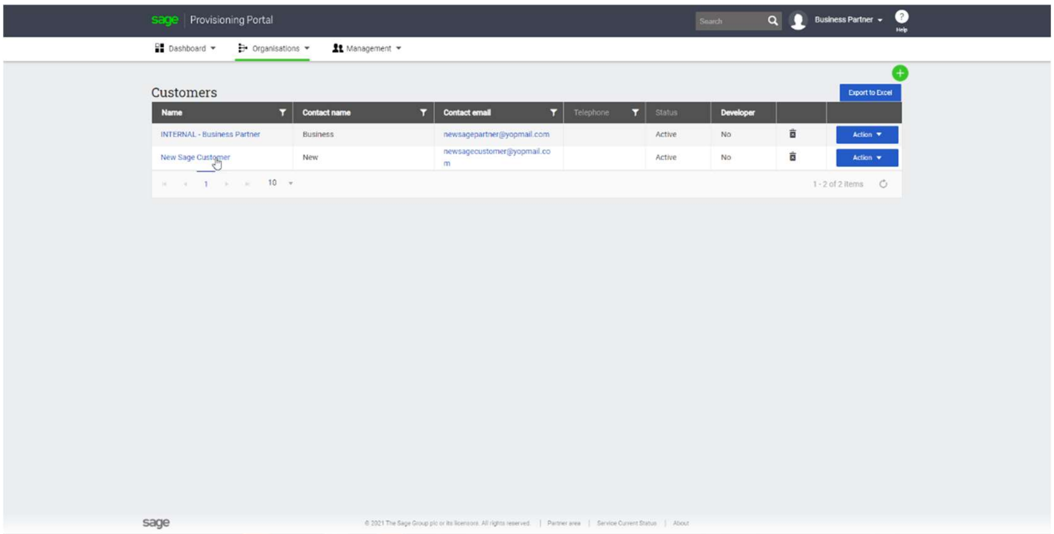
Once the customer has registered their Sage ID, the partner can now add a new site for the customer.

Partner Operator

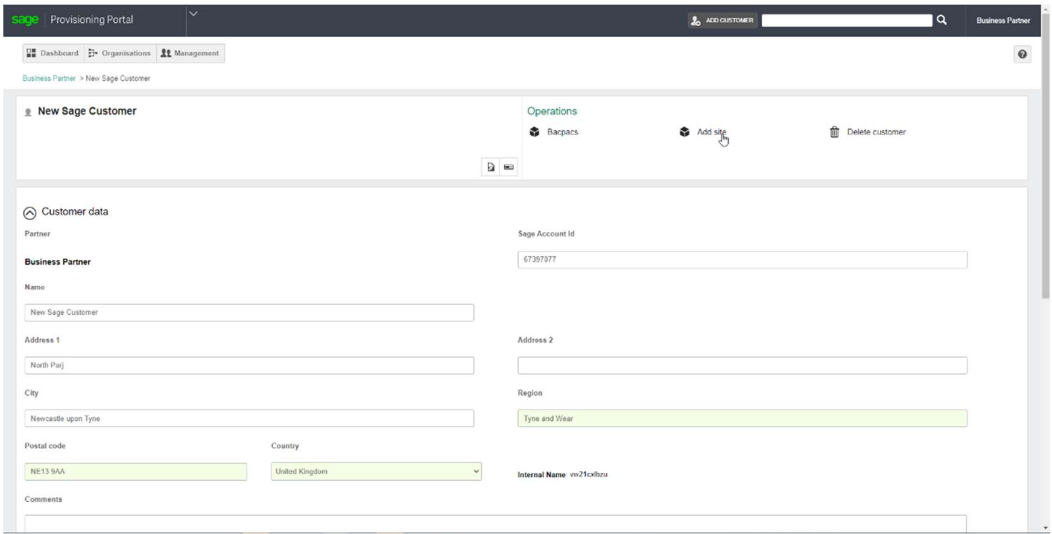
1. To create a Site for a customer, go to **Organisations**, then select **Customers**.



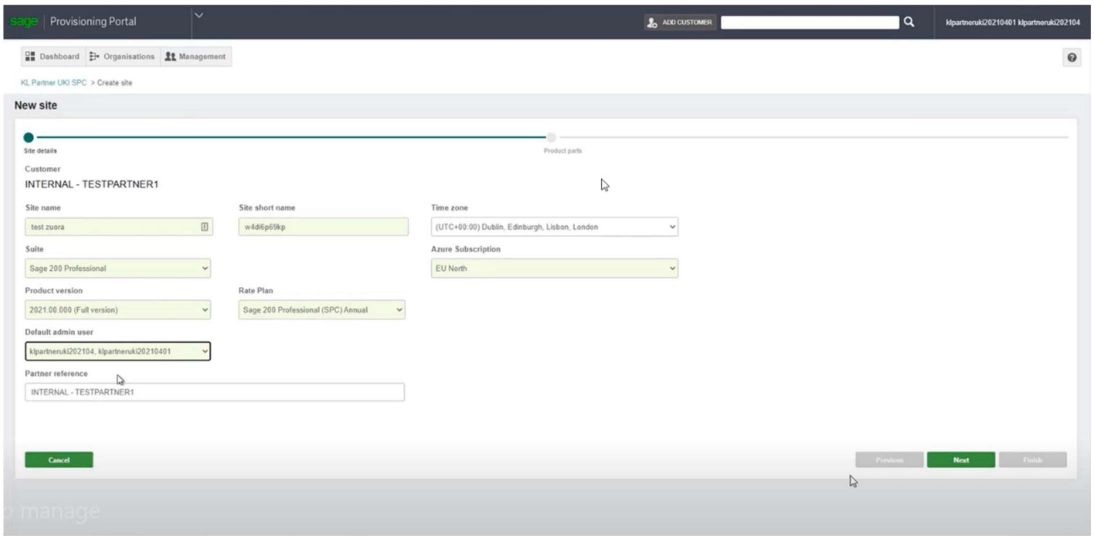
2. Select the customer that you would like to create a new site for.



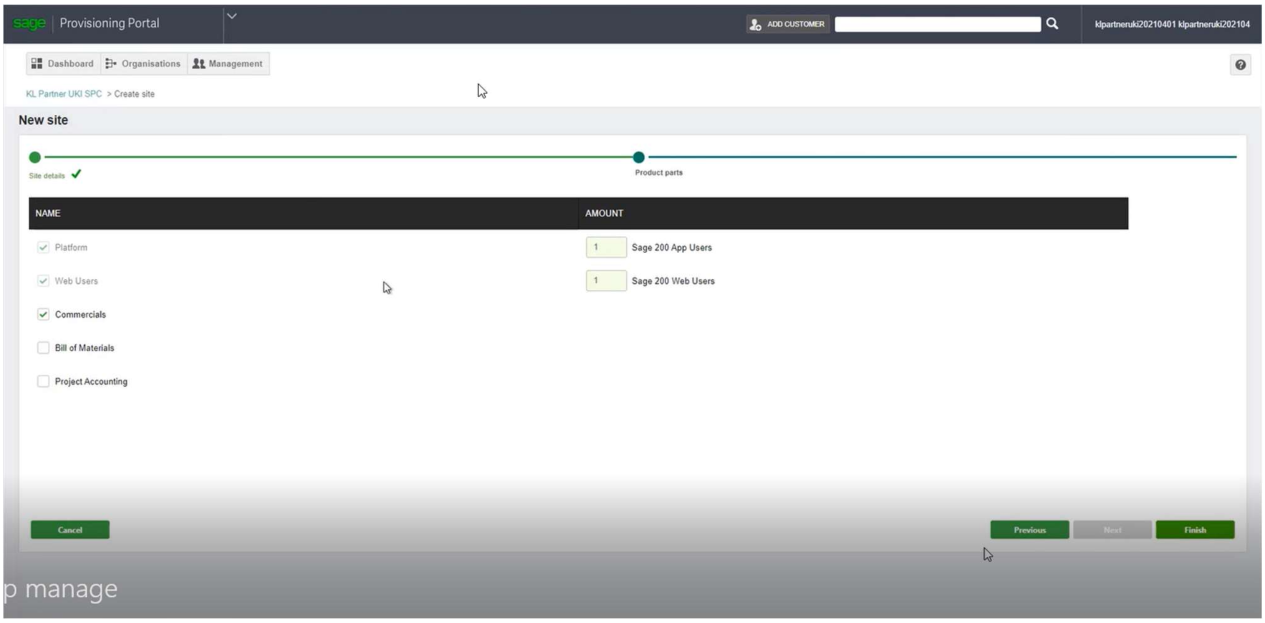
3. To add a site for this customer, go to the **Operations** panel, then click **Add Site.**



4. Enter the **Site name**, then select the **Azure Subscription**, **Suite**, **Time zone**, **Product version**, **Rate Plan** and **Default admin user** details. Click **Next**.



5. Select the required **modules** then select the amount of **App User** and **Web User** licenses you require.



6. After you have finished entering the site details, the following message will appear '**All steps were completed you will be notified when the site creation process has finished.**'
7. The status for this new site shows **Pending Acceptance**.

8. Once the Partner Operator has entered the customer site information in the Sage Provisioning Portal, a Sage Site Creation Confirmation Acceptance email is sent to the customer. There will be a link in the email that the customer will click on to accept our terms and conditions.

After they click the link, they will be taken to a screen which shows the modules that have been selected for them and confirm that they have read the **Terms and conditions.**

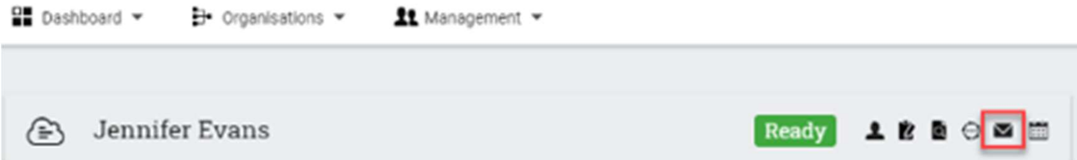
Once the customer is happy to continue they click '**I accept the terms and conditions**', and '**I acknowledge and agree that my Sage business partner will have administrator access to the site that hosts my Sage product(s) and the data therein**', then click **Confirm**.

Once they have acknowledged that they have read the information the following message will appear '**The site has been accepted successfully.**' The status for this site now shows as **Provision**.

After the customer has accepted the terms and conditions, about one hour later the partner will receive an email informing them that the site is ready for use.

9. The partner can now send an email to the customer to inform them that the site is now ready.

Select the new customer site, then click on the mail icon.



Select **Yes** to notify the customer that the site is ready for use.

10. The following message will appear: "**The email notification has been sent to the customer**".

Customer

11. The customer will receive an email informing them that the Sage 200 site is ready. There is an option on the email to **Manage your site and invite other users.** They can do this to add and assign any users that require access to the site…

Adding and Assigning Users

Sage 200 Professional uses single Sage Account sign-on. All users are managed from the Sage Provisioning Portal.

After registering for a Sage 200 subscription, the initial user will be able to add and assign additional users to the offering. *It is imperative that the users are created using the following steps. Do not create users in Azure Active Directory manually – this will cause issues. The users must be created in the Sage Provisioning Portal to ensure that they are provisioned in Azure correctly and are placed in the correct Azure Active Directory groups.*

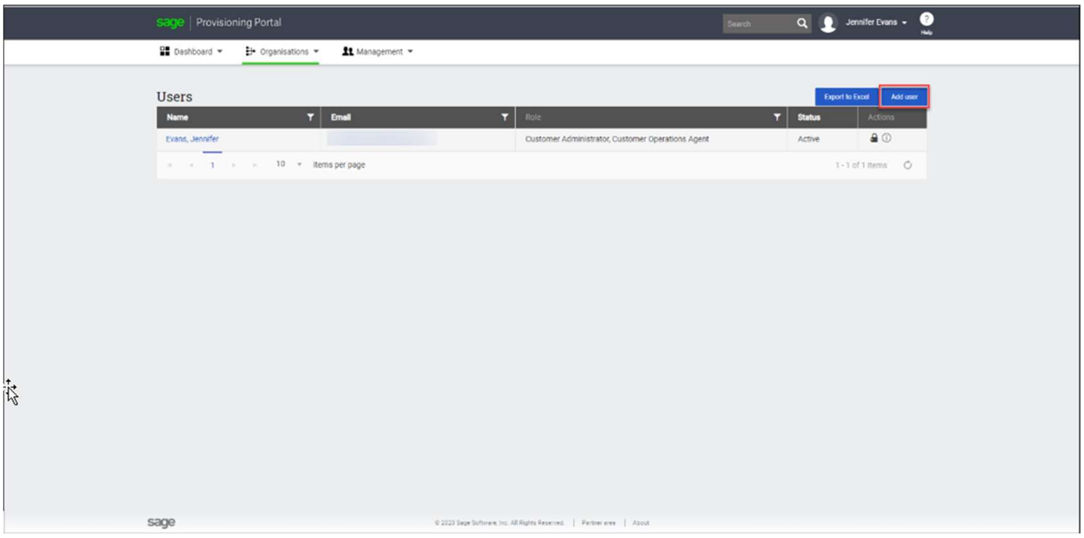
Allowing additional users for access to Sage 200 Professional requires 2 steps:

1. Adding the user to the customer record. An email address is required for them to get registered.
2. Assigning the registered user to the Site.

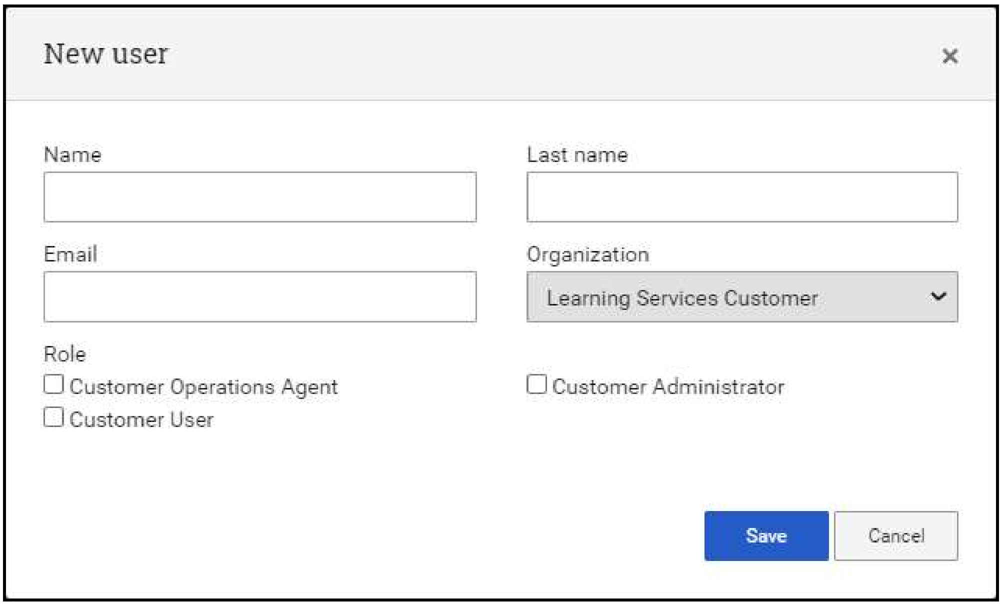
Customer Operations Agent (Inviter): Adding a user

The customer operations agent can access the Sage Provisioning Portal to initiate the invitation process for adding a user.

1. From the **Organisations** menu, select **Users** then click **Add user**.



2. You can find below a full explanation of each of the fields available in the **New user** screen.

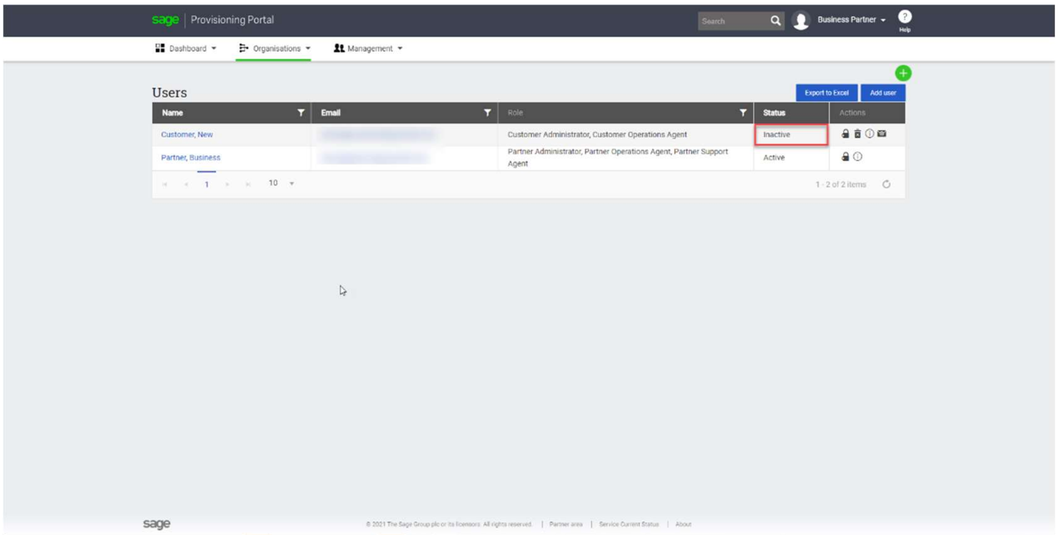


Name/Email: Fill out the appropriate name and email address for the user.

Role: Select the appropriate role for the user.

> **Customer Operations Agent** –This is a user with privileges to Sage Provisioning Portal for managing users as well as access to Sage 200 Professional. *This user can create Customer Operations Agent and Customer User roles on the portal.*
>
> **Customer User** – This is a user that can only access Sage 200 Professional.
>
> **Customer Administrator** –This user is the Business Owner that can accept the terms and conditions and can manage users. It is uncommon to select this privilege when adding/assigning new users. *This user can create Customer Administrator, Customer Operations Agent and Customer User roles on the portal.*

3. After adding the new user information and clicking **Save**, the user is added in the list, and the invitee user status is **Inactive.**



Invitee: Sage ID Registration

1. The 'Invitee' receives an invitation email in their inbox.
2. The invitee follows the steps on the email to register their Sage Account.
3. Upon completing the Sage Account registration, the invitee will be redirected onto the Sage Provisioning Portal.
4. The invitee then receives another email in their email inbox which confirms that their Sage Account has been registered.

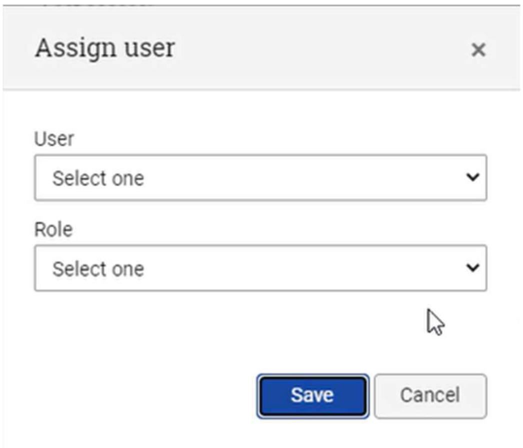
Customer Operations Agent (Inviter): Assigning Invitee to a Site

1. Once the Invitee has completed the Sage Account registration, the Customers Operations Agent (Inviter) can refresh the customer record to see that the Invitee status has switched to Active.

   Previously, the status was Inactive. Only when the Sage ID is switched to Active can the Customers Operations Agent (Inviter) assign the invitee to a Site for the customer record.

2. The Customers Operations Agent (Inviter) can access the **Site Dashboard**, select the site, and then in the **Users** panel, click the **Assign user** option to assign this invitee to the site.

3. When assigning the user to the Site, choose the **Role** from the dropdown for the invited user.



   The Assign user options available will depend on the role that you have.

Partner Operator: Managing Customers

Customers Operations Agent (Invitee): Access to Sage 200 Professional

The newly assigned user will now receive two emails.

- The first email states that they have been given access to a Sage 200 Application site, and advises the user to download the Remote Desktop Application.

Dear Christopher Hall CustomerServices ,

DT2UKCust has granted you access to Sage 200: PCPRInternalCustServices .

In order to access the software, you will need to install Microsoft Remote Desktop.
You can do this from the Microsoft Store, or if you are using Mac you can do this from the Mac App Store.

Please note: Separate third party terms and conditions will apply to your use of Microsoft Remote Desktop, and it is your responsibility to ensure that you understand and accept these terms, and have the right licences in place to use Microsoft Remote Desktop.

Instructions on how to obtain your Login details for Microsoft Remote Desktop will be sent to you in a seperate email.

Thank you for using the Sage Provisioning Portal.

The Sage 200 Team

- The second email provides a link to obtain their login details for Microsoft Windows Virtual Desktop. This will contain a temporary password that must be changed on first login.

Dear Christopher Hall CustomerServices ,

A request has been received to perform a change relating to your Sage 200 application.

Please click on this link to confirm the operation:

Dashboard
CustomerServices, Christopher Hall

Operation	Get Azure Active Directory initial login password
Requested by	Christopher Hall CustomerServices (
Date	06/28/2021 11:53
IP	79.65.85.172
Link expires on	06/29/2021 11:53

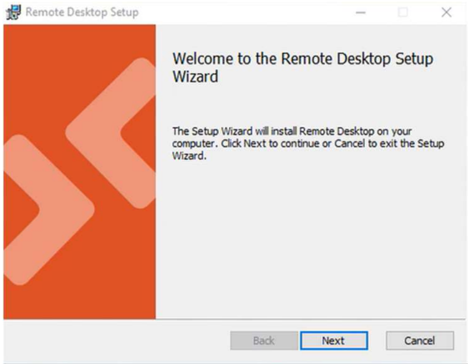
Thank you for using the Sage Provisioning Portal

The Sage 200 Team

Accessing and Opening Sage 200 Professional

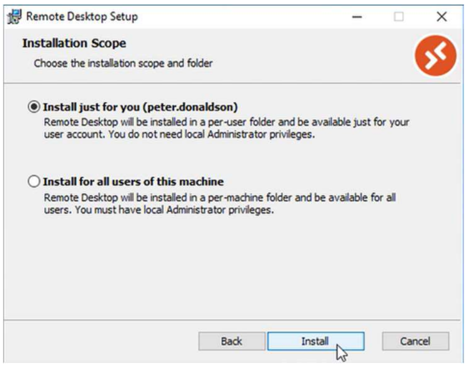
Using the link in the first email, the customer user will download and run the installer for Microsoft Remote Desktop.

1. They will be presented with this screen...

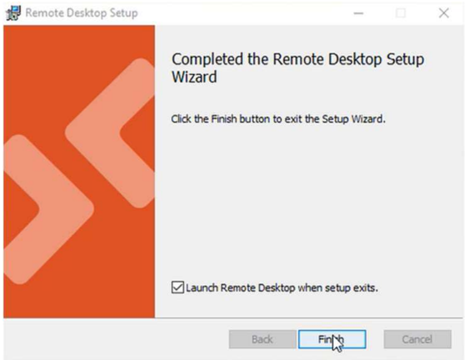


Click Next to continue.

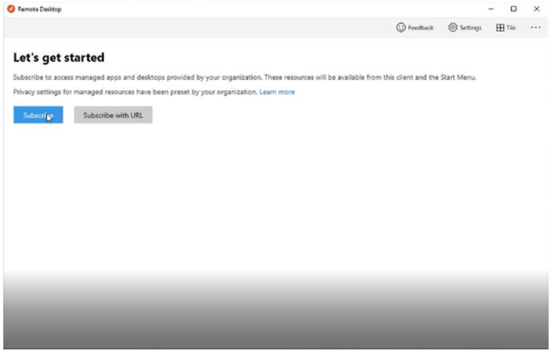
2. Accept the terms and conditions.
3. Select the installation scope then click install.



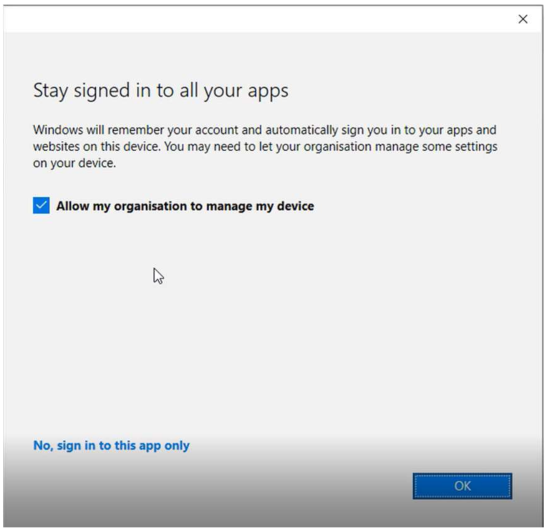
4. Let the installation complete then launch the application.



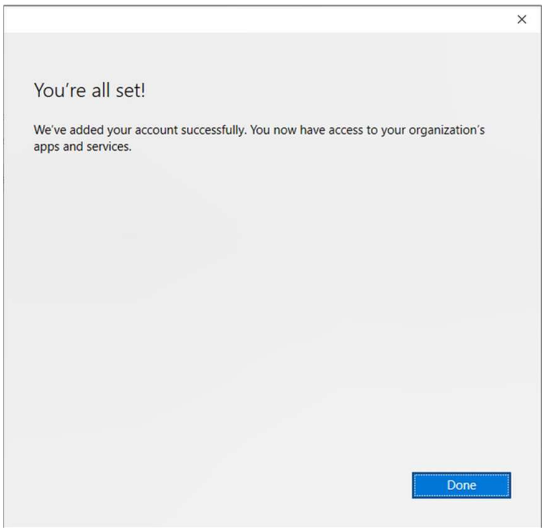
5. Once the application launches, you will be presented with this screen. Click Subscribe.



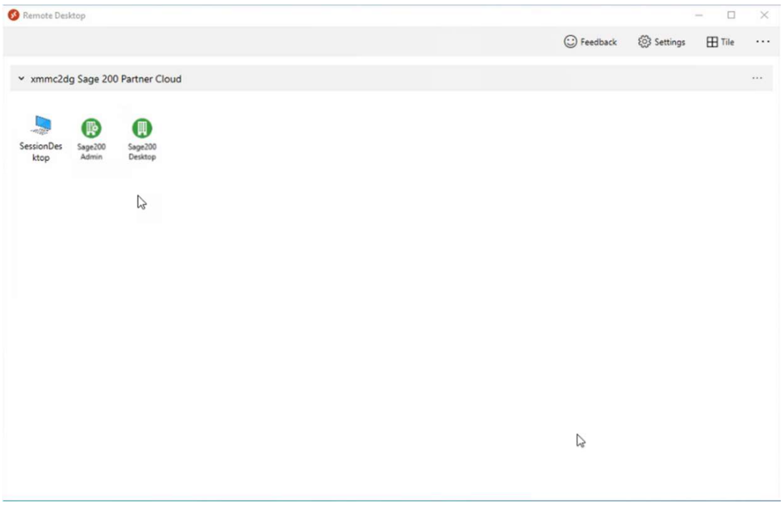
6. Sign in with your Sage Account. If you see the following screen, choose whether to stay signed in.



7. Once the process has completed, you'll see this screen…



8. When you open the Remote Desktop app, it will look like this…



Depending on the user's level of access, you may not see all of these icons.

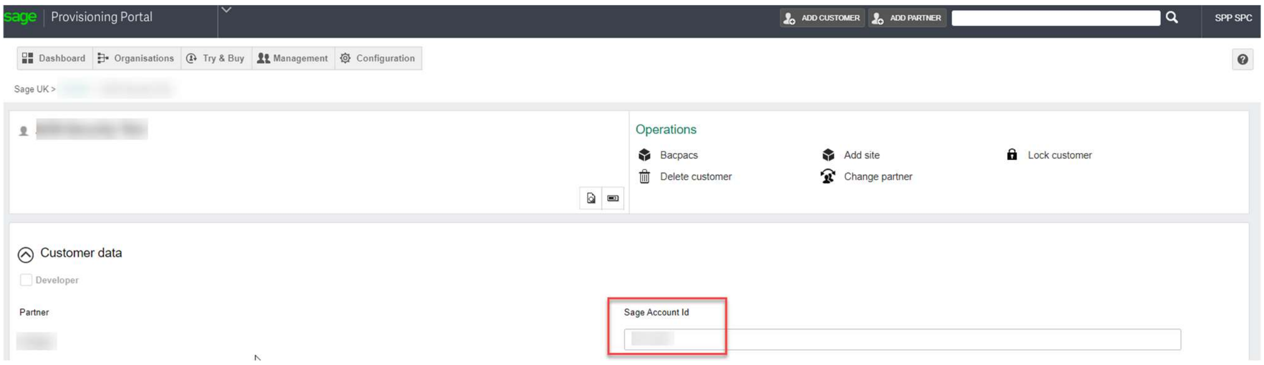
SessionDesktop: This icon gives you access to the virtual machine to allow you to perform additional tasks like installing Excel for example. This icon will usually only be visible to the business partner.

Sage200 Admin: This icon gives you access to the Sage 200 Administrator application.

Sage200 Desktop: This icon gives you access to the Sage 200 Professional desktop application.

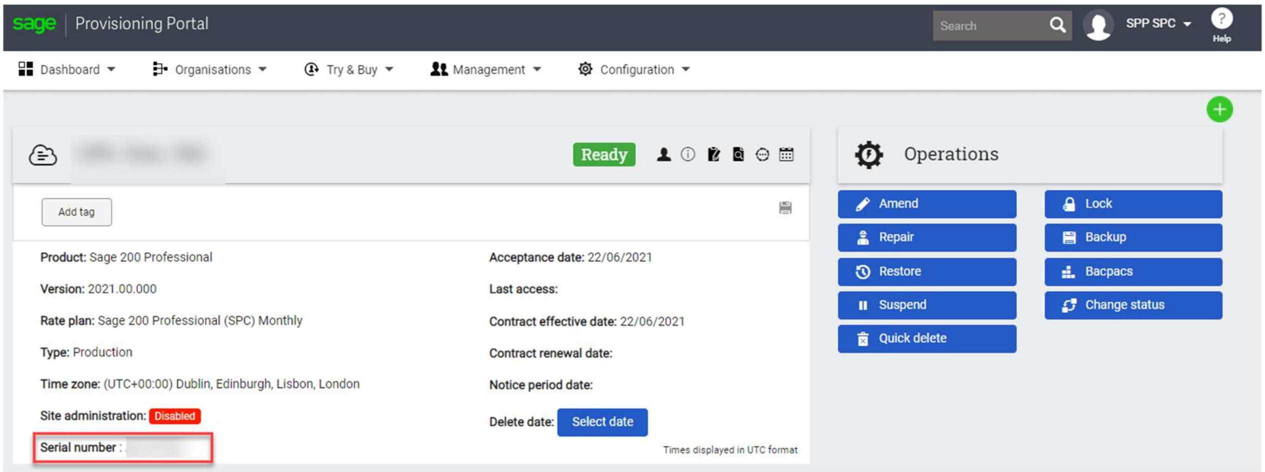
Double clicking on any of the icons will open them in a new window on your desktop. The users would then use the application as they normally would if this were an on-premise version.

When you open Sage System Administrator for the first time, you should be prompted to enter the Account Number and Serial Number for your customer. This can be found in the Sage Provisioning Portal. The account number can be found in the Customer Record…

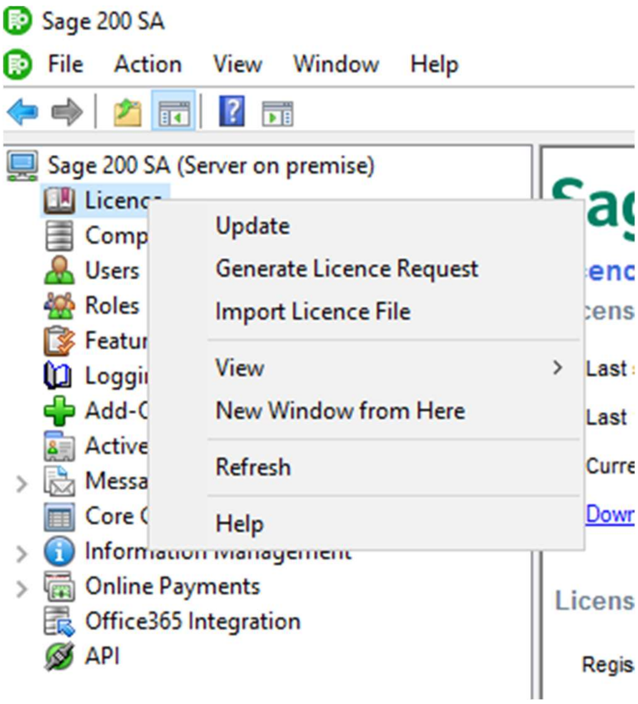


Partner Operator: Managing Customers

The Serial Number can be found on the Site page within the portal…



If, for some reason, you are not prompted to enter the details then right-click on the License menu option and click Update.



Enter your Account Number and Serial Number then click OK. The program will then validate the license.

Summary

There are several steps to complete before a customer can start using the solution.

1. First, the Partner Operator creates the account for a new customer.
2. Once the Partner Operator has entered the customer information in the Sage Provisioning Portal, a Sage Account Registration email is sent to the customer.
3. After completing the Sage Account registration, the customer will be redirected onto the Sage Provisioning Portal.
4. Once the site is created by the Partner Operator, the customer will receive an email confirming that their Sage Account has been registered.

Allowing additional users for access to Sage 200 requires 2 steps:
1. Adding the user to the customer record.
2. Assigning the registered user to the Site.

The 'Manage Sage 200 and invite others to use it' link is only available to assigned users given the Customer Operations Agent role. A user given Customer User role will not have access to this link.

End of Lesson

Lesson 5 – Partner Operator: Site Maintenance

Learning Outcomes

This lesson explains how to work with backups and how to repair a site.

Learning Objectives

After completing this lesson, you will be able to:

A. Back up Policy
B. Back up a database for Sage 200
C. Back up a site
D. Restore a database backup for Sage 200
E. Delete a database for Sage 200
F. Restore a site backup
G. Repair a site
H. Change a virtual machine size
I. Recover files from Azure virtual machine backup

Backup Policy

Sage Provisioning Portal (SPP) uses automatic rolling backups, and you can create backups on demand.

Rolling backups

SPP keeps a backup of the virtual machine and databases for the previous 7 days, 1 month and 1 year.

Regardless of when a site is created, SPP creates a monthly backup on the last day of the month. For example, if a site is provisioned on January 1st, on February 1st you would be able to restore data for the entire month of January.

When creating daily and monthly backups for the Sage Partner Cloud, SPP uses Azure Recovery Services Vault for the virtual machine and point in time recovery (PiTR) for the databases (no physical file is created). Yearly backups use Azure Recovery Services Vault for virtual machines. Any SQL Server databases are backed up in a bacpac file. These files are stored in a geo replicated storage container for each site.

On demand backups

You can create a backup of a site or individual databases at any time.

How the automatic backups work

Daily / Monthly:

SPP has a physical backup for the VM data disk and use PiTR for the databases (no physical file is generated).

Yearly:

SPP has a physical backup for the VM data disk and export the databases in a bacpac format.

SPP uses restore points (Azure Recovery Services vault) for the VM and export the databases in a bacpac format.

Additional Information

SPP keeps the yearly backup until December 31.

On demand backups:

SPP has a physical backup for the VM data disk and export the databases in a bacpac format.

SPP adds a restore point (Azure Recovery Services vault) for the VM and export the databases in a bacpac format.

Additional Information

The Sage Provisioning Portal does not keep physical files for VM restore points (Azure Recovery Services vault) or PiTR for databases. For those files that SPP exports they are stored in a storage container per site (VM data disk backup and database bacpac files). Storage containers are geo replicated.

Backing up a Database for Sage 200

You can create an on-demand backup that does not affect users working with the product. Only the selected database is backed up. The point-in-time restore (PITR) feature is used for database backups.

To create an on-demand backup for Sage 200:

1. From the **Sage Provisioning Portal**, go to **Dashboard**, then select **Site Dashboard**.
2. Select the **Site Name**.
3. Expand the **Databases** panel.
4. Under the **Actions** heading, click the **Backup** icon for the database that you want to back up.
5. Click **Yes**.

Backing up a Site

A site backup includes backups for the virtual machine and data disks. All Azure SQL databases that are included in the site are included in the backup. The backups are housed in Azure Recovery Services vaults.

To create a site backup:

1. From the **Sage Provisioning Portal**, go to **Dashboard**, then select **Site Dashboard**.
2. Select the **Site Name**.
3. Under the **Operations** panel, click **Backup**.
4. Click **Yes**.

Restoring a Database Backup for Sage 200

To restore a database backup for Sage 200:

1. From the **Sage Provisioning Portal**, go to **Dashboard**, then select **Site Dashboard**.
2. Select the **Site Name**.
3. Expand the **Databases** panel.
4. Under the **Actions** heading, click the **Restore** icon.
5. From the **Restore database backup** screen, click **Restore database** next to the date that you choose to restore.
6. Click **Yes** to the confirmation message.

   This may take some time (e.g., 15 minutes to one hour) to restore a database backup for Sage 200.

You can also restore ICT databases for Sage 200. For system databases you can only copy and then download the database.

Important Information

When Sage Provisioning Portal restores any database it automatically creates a database with the same name and the suffix "_restored". This "_restored" database is used for the PiTR (Point in Time Restore) and it is automatically deleted after 30 days.

You should NOT delete the "_restored" databases as they are used by Sage Provisioning Portal for restore options.

What is the difference between Restore and Copy?

Restore: The Restore option restores the database up to the date you choose to restore the database.

Copy: The Copy backup option exports the database, and then is moved to the "on demand backups" section. Backups in this section are never deleted and can be downloaded as a bacpac file.

Retention Policy: When a site is deleted, database backups are kept for 60 days.

Deleting a Database for Sage 200

To delete a database for Sage 200 Professional:

1. From the **Sage Provisioning Portal**, go to **Dashboard**, then select **Site Dashboard**.
2. Select the **Site Name**.
3. Expand the **Databases** panel.
4. Under the **Actions** heading, click the **Delete** icon.
5. Click **Yes**.

Restoring a Site Backup

When you restore a site, the virtual machine and all data disks are restored. All SQL databases are included in the restore.

The virtual machine is stopped before it is restored. It is started again after the restore process is complete.

1. From the **Sage Provisioning Portal**, go to **Dashboard**, then select **Site Dashboard**.
2. Select the **Site Name**.
3. Under the **Operations** panel, click **Restore**.
4. From the **Restore site backup** screen, click **Restore site** icon next to the date to restore a site backup.
5. Click **Yes** to the confirmation message.
6. The status of the site will change to **Restoring**. Once the restore is complete the status will change back to a **Ready** status.

Repairing a Site

You can repair a site regardless of its status. This operation is used to troubleshoot minor issues. The actions associated with the repair operation depend on the operating company.

To repair a site:

1. From the Sage Provisioning Portal, go to Dashboard, then select Site Dashboard.
2. Select the Site Name.
3. Under the Operations panel, click Repair.
4. Click Yes.

Changing a Virtual Machine Size

To change the virtual machine size:

1. From the Sage Provisioning Portal, go to Dashboard, then select Site Dashboard.
2. Select the Site Name.
3. Under the Operations panel, click Change VM size.
4. From the drop-down menu, select the Size.
5. Click Save.

Recover Files From Azure Virtual Machine Backup

For more advanced users, you can recover files and folders from an Azure VM backup. Restoring files and folders is available only for Azure VMs deployed using the Resource Manager model and protected to a Recovery Services vault. The backups performed within the Sage Provisioning Portal utilize this approach, so these instructions apply to automatic and manual backups performed in the portal.

To learn more about how to recover files from Azure virtual machine backup go to:
https://docs.microsoft.com/en-us/azure/backup/backup-azure-restore-files-from-vm

Important Note

The training resources provided above is created and maintained by Microsoft. Every effort has been made to ensure that the information provided is accurate, up-to-date, and complete, but no guarantee is made to that effect as URLs are continuously changing.

Caution:

- Manually replacing individual files in a Sage 200 installation can cause system corruption or instability and should only be attempted by partners with experience doing so, or with guidance from Sage support.
- If you choose to recover files from an Azure VM backup, there will be no audit trail in the Sage Provisioning Portal for this action.

Check Your Knowledge

Answer the following questions about the material covered in this lesson.

Short Answer
Write a short answer to the question below.

1. What are the two steps to back up a site?

____

____

Multiple Choice
Mark the correct answer(s) to the question below.

2. What option do you select under the Actions heading to back up a database?
   A. _____ Repair
   B. _____ Backup
   C. _____ Restore
   D. _____ Delete

Summary

You can create an on-demand backup that does not affect users working with the product.

A site backup includes backups for virtual machines, databases, and disks.

You can repair a site regardless of its status. This operation is used to troubleshoot minor issues. The actions associated with the repair operation depend on the operating company.

End of Lesson

Lesson 6 – Partner Operator: Managing Additional Azure SQL Servers

Learning Outcomes

This lesson explains how to manage additional Azure SQL servers in the Sage Provisioning Portal.

Learning Objectives

After completing this lesson, you will be able to:

A. Add an Azure SQL Server
B. View Azure SQL Server database details
C. Add a login for an Azure SQL Server database
D. Assign a login account to a database
E. Change the password for a server login account
F. Change the role(s) assigned to a login account for a database

Managing Additional Azure SQL Servers

If you are installing an application that requires its own Azure SQL server, you can add an Azure SQL server to the site.

When you create Azure SQL servers and add databases to them, the databases are automatically synchronized with the Sage Provisioning Portal. The synchronization process automatically starts every hour. You can also synchronize them manually. Because the databases are synchronized, you can use the backup and restore features in the provisioning portal.

Important Note

- When you delete a site, the Azure SQL server and related databases are not deleted.

Because the databases are not created as part of the site creation process, when you delete the site, these databases are not deleted.

Adding an Azure SQL Server:

1. From the Sites list, select the site to open the site details page.
2. In the Database servers panel, click Add SQL Server.
3. In the New SQL Server window, enter and confirm the password for the SQL server administrator account.
   The password must meet the following requirements:
   - Between 8 and 128 characters.
   - Cannot contain all or part of the login name (part is defined as three or more consecutive characters).
   - Must contain at least one character from three of the following characters:
     - An uppercase letter from the English alphabet
     - A lowercase letter from the English alphabet
     - A number
     - A non-alphanumeric character

4. The server name and server administrator name are automatically created and cannot be changed.
5. Click Save.

The Azure SQL Server is added to the Database servers list. Initially the status is Creating, and it will switch to Ready within a few minutes.

To view Azure SQL Server database details:

1. From the **Sites** list, select the site to open the site details page.
2. In the **Database servers panel**, in the **Name** column, click the Azure SQL server name.
   The Azure SQL server details window opens showing the following fields:
   - **Name**: The URL for the Azure SQL server. (You'll need this to connect to the server.)
   - **Server admin**: administrator account user name.
   - **Server logins panel**: Displays the logins that have been created. (For security purposes the default login is not shown.)
   - **Databases panel**: Shows the databases that have been created in the Azure SQL server.

   The following buttons are available in the Operations area:
   - **Set server admin password**: Click to set a new password for the database administrator.
   - **Sync databases**: Click to manually synchronize the databases in Azure with the Sage Provisioning Portal.
   - **Delete server**: Click to delete the Azure SQL server. You can delete a server only if it contains no databases.

Adding a login for an Azure SQL Server database:

1. From the **Sites** list, select the site to open the site details page.
2. In the **Database servers** panel, in the **Name** column, click the SQL server name. The SQL server details window opens.
3. In the **Server logins** panel, click **Add Login**. The Add Login window opens.
4. In the **Name** field, enter a user name.
   The field contains a view-only area with text that is automatically added to the beginning of the user name.
5. Enter and confirm the password.
   The password must meet the following requirements:
   - Between 8 and 128 characters
   - Cannot contain all or part of the login name (part is defined as three or more consecutive characters)
   - Must contain at least one character from three of the following characters:
     - An uppercase letter from the English alphabet
     - A lowercase letter from the English alphabet
     - A number
     - A non-alphanumeric character
6. Click **Save**.

The login account is added to the Server logins panel. Initially the status is Pending while the account is being created. The status will then change to Active.

Important Note

Click the Refresh button to refresh the status list.

Partner Operator: Managing Additional Azure SQL Servers

Assigning a login account to a database:

1. From the **Sites** list, select the site to open the site details page.
2. In the **Database servers** panel, in the **Name** column, click the SQL server name. The SQL server details window opens.
3. In the **Databases** panel, in the **Actions** column, click the **Manage Logins** button. The Manage login accounts window opens.
4. In the **Database users** panel, click **Assign login**. The Assign login account window opens.
5. In the **Login** field, select the login.
6. In the **Roles** area, select one or more roles for the account.
7. Click **Save**.

The login account is added to the Database users panel. Initially the status is Pending. The status will then change to Active when the login account has been added to the database.

Changing the password for a server login account (other than the administrator account):

1. From the **Sites** list, select the site to open the site details page.
2. In the **Database servers** panel, in the **Name** column, click the SQL server name. The SQL server details window opens.
3. In the **Server logins** area, in the **Actions** column, click the **Set password** button. The Set login password window opens.
4. Enter and confirm the new password.
5. Click **Save**.

Changing the role(s) assigned to a login account for a database:

1. From the **Sites** list, select the site to open the site details page.
2. In the **Database servers** panel, in the **Name** column, click the SQL server name. The SQL server details window opens.
3. In the **Databases** panel, in the **Actions** column, click the **Manage Logins** button. The Manage login accounts window opens.
4. In the **Database Users** panel, in the **Actions** column, click the **Edit** button. The Edit database user roles window opens.
5. In the **Roles** area, select or clear the role checkboxes as needed to assign or unassign roles.
6. Click **Save**.

Check Your Knowledge

Answer the following questions about the material covered in this lesson.

Short Answer
Write a short answer to the question below.

1. What are the steps to change the password for a server login account?

____

____

Multiple Choice
Mark the correct answer(s) to the question below.

2. What option do you select to add an Azure SQL Server?
   A. _____ Add SQL Server
   B. _____ Assign Login
   C. _____ Sync Databases
   D. _____ Manage Logins

Summary

If you are installing an application that requires its own Azure SQL server, you can add an Azure SQL server to the site.

When you create Azure SQL servers and add databases to them, the databases are automatically synchronized with the Sage Provisioning Portal.

End of Lesson

Sage Partner Cloud - Answer Keys

This chapter includes the answers for all the Check Your Knowledge sections in this guide.

Lesson 1 – Sage Provisioning Portal

1. Operating company, partner, and customer.
2. Sage Operator creates new partner accounts, Partner Operator creates new accounts and sites for a customer, Customer Operations Agent adds users to the customer record then assigns users to the site.
3. D

Lesson 2 – Sage Operator

1. You can click on the Portal link, in the email that confirms that your Sage ID has been registered.
   You can access the Portal through the following URL: https://www.sageerponlineservices.com/
2. B

Lesson 3 – Partner Operator: Setting up Subscriptions

1. In the manage your subscription email, select step 1 to download the Azure template and PowerShell script.
2. A

Lesson 4 – Partner Operator: Managing Customers

1. Adding the user to the customer record. Assigning the registered user to the Site.
2. C

Lesson 5 – Partner Operator: Site Maintenance

1. From the Sage Provisioning Portal, go to Dashboard, then select Site Dashboard.
   Select the Site Name.
   Under the Operations panel, click Backup.
   Click Yes.
2. B

Lesson 6 – Partner Operator: Managing Additional Azure SQL Servers

1. From the Site list, select the site to open the site details page.
   In the Database servers panel, in the Name column, click the SQL server name.
   In the Server logins area, in the Actions column, click the Set password button.
   Enter and confirm the new password.
   Click Save.
2. A

End

Appendix

Learning Outcomes

The following topics are included in this Appendix:

- Microsoft Azure Resource Tagging
- Microsoft Azure Training Resources
- Two-factor Identification
- Creating a User in Azure
- Giving Users Permissions
- About Execution Policies
- Change the Execution Policy
- Azure PowerShell Command Line
- Office Deployment Tools
- Windows Update
- Selecting a Mode to Run Applications

Appendix

Microsoft Azure Resource Tagging

Resources created by the Sage Provisioning Portal in Azure are tagged so that it is easier to filter them. The following table lists the resources that are tagged and the tags for each one.

	Tagged Resources	Tags
Virtual machine for sites hosted in an SPP subscription	Virtual Machine Data Disk OS Disk Network Interface Card	SPPSite SPPCustomer SPPProduct SPPSubscription SPPPartner
Virtual machine for sites hosted in a partner subscription	Virtual Machine Data Disk OS Disk Network Interface Card Application Security Group	SPPSite SPPCustomer SPPProduct SPPSubscription SPPPartner
Partner infrastructure	Network Security Group Recovery Services Vault KeyVault Virtual Network Storage Account Application Security Group	SPPSubscription SPPPartner
Databases	All site databases	SPPSite SPPCustomer SPPProduct SPPSubscription SPPPartner

Microsoft Azure Training Resources

The following are recommended training resources that will help develop the competencies that you require.

Important Note

The training resources provided below are created and maintained by Microsoft. Every effort has been made to ensure that the information provided is accurate, up-to-date, and complete, but no guarantee is made to that effect as URLs are continuously changing.

Quickstart: Create an Azure SQL Database single database
https://docs.microsoft.com/en-us/azure/azure-sql/database/single-database-create-quickstart?tabs=azure-portal

Connect to a SQL Server virtual machine on Azure
https://docs.microsoft.com/en-us/azure/azure-sql/virtual-machines/windows/ways-to-connect-to-sql

Authorize database access to SQL Database, SQL Managed Instance, and Azure Synapse Analytics https://docs.microsoft.com/en-us/azure/azure-sql/database/logins-create-manage

Elastic pools help you manage and scale multiple databases in Azure SQL Database
https://docs.microsoft.com/en-us/azure/azure-sql/database/elastic-pool-overview

The Creation of resources in Azure is governed by Role based Access Control. RBAC can be applied at the subscription, resource group or resource level.
https://docs.microsoft.com/en-us/azure/role-based-access-control/role-assignments-portal

Azure DevOps multi-stage deployments
https://levelup.gitconnected.com/azure-devops-multi-stage-deployments-708a54700a85

Multi-stage pipelines user experience
https://docs.microsoft.com/en-us/azure/devops/pipelines/get-started/multi-stage-pipelines-experience?view=azure-devops

Azure DevOps Pipelines – Multi-Stage Pipelines and YAML for Continuous Delivery
https://devblogs.microsoft.com/premier-developer/azure-devops-pipelines-multi-stage-pipelines-and-yaml-for-continuous-delivery/

Service Organization Controls (SOC)
https://docs.microsoft.com/en-us/microsoft-365/compliance/offering-soc?view=o365-worldwide

Microsoft Azure Compliance Offerings (Download and jump to the compliance requirement)
https://azure.microsoft.com/en-us/resources/microsoft-azure-compliance-offerings/

Two-factor Identification

To add an extra layer of protection for your Sage Account, you can add two-factor authentication. With this feature added, after you enter your Sage Account and password to log in to an application, you will receive a text message or phone call with a code. You must then enter the code to complete the log-in process. You can select a check box so that you do not have to enter a code the next time that you log in on that same device.

To add two-factor identification for your Sage Account:

1. Click this link or copy it into your browser address bar: https://account.sso.sage.com
2. Log in with your Sage Account.
3. Click Manage Account.
4. In the Two-Factor Authentication area, click Add.
5. Click Continue.
6. Select your country code and enter a phone number.
7. Select an option to get the code by either a text message or phone call.

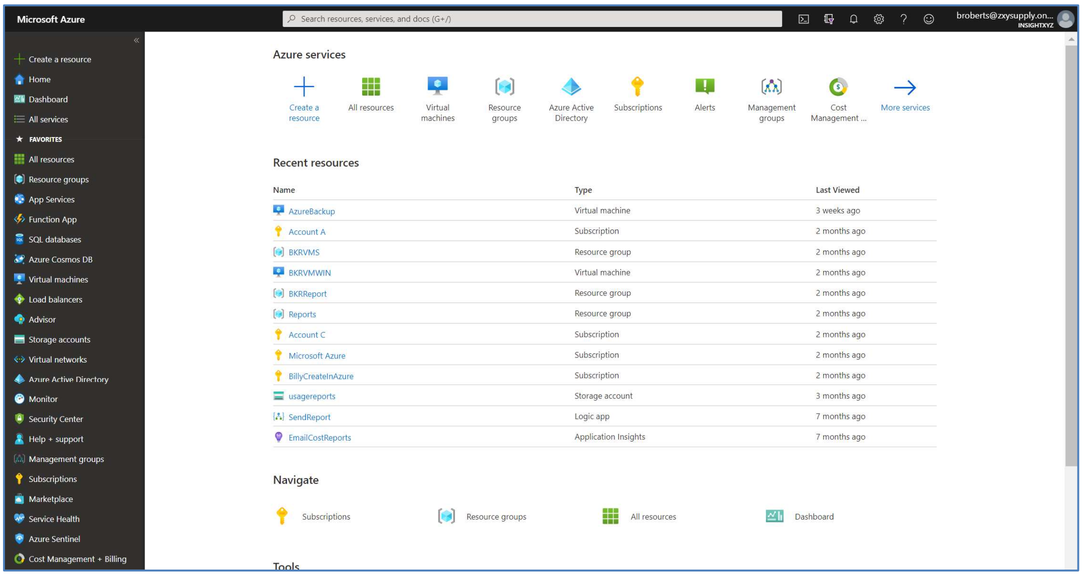
8. Click Continue. A code is sent to the phone number that you entered.

9. Enter the code and then click Continue.

   Two-factor identification is now set up for your Sage ID.

Creating a User in Azure

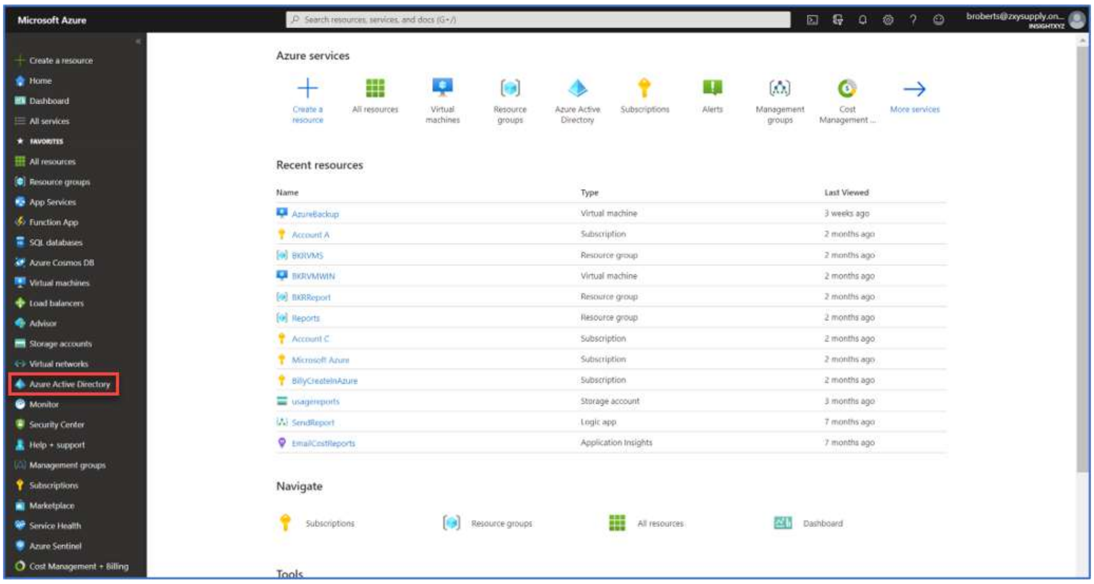
1. Log in to: Http://portal.azure.com



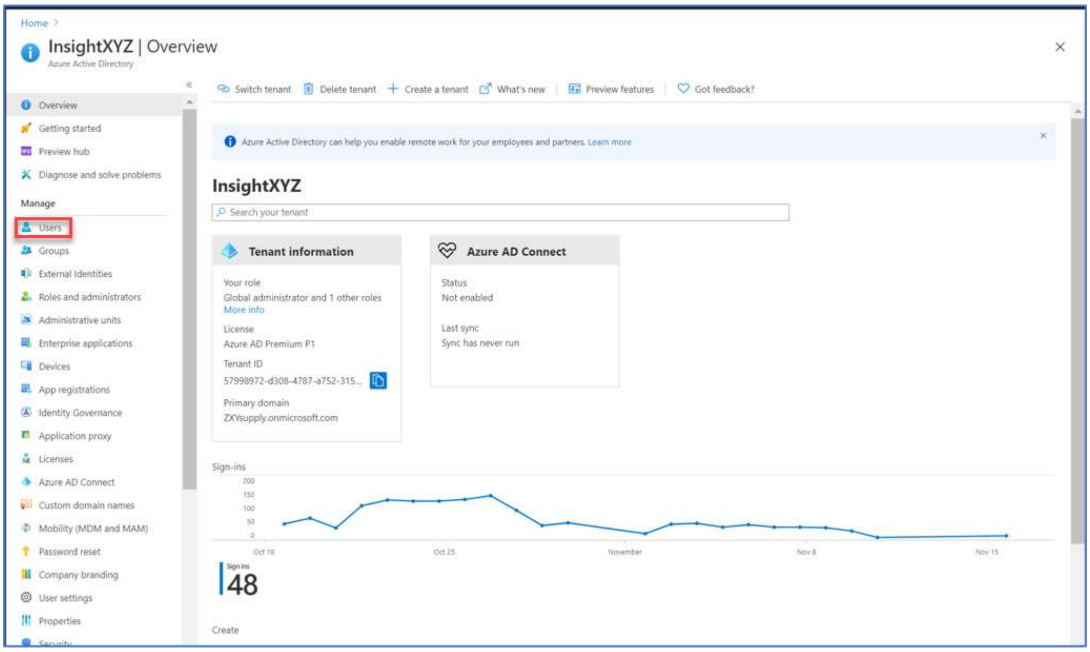
Important Note

Your screen may look different depending on the resources that you may or may not have.

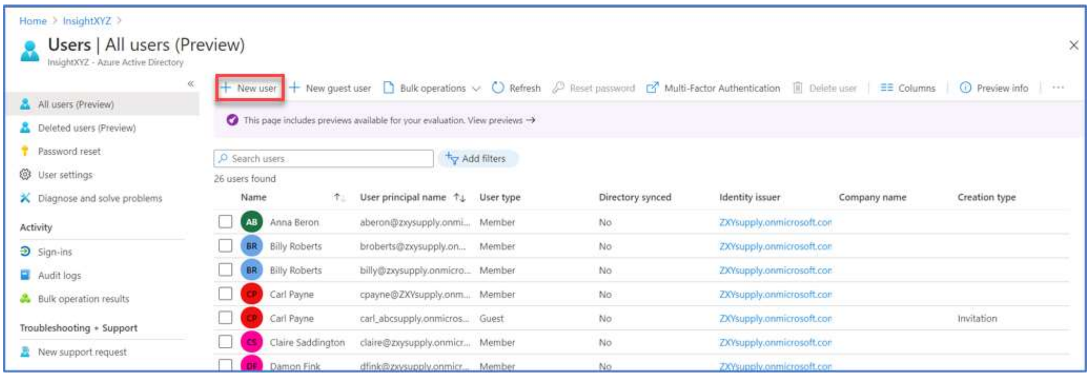
2. Click on Azure Active Directory.



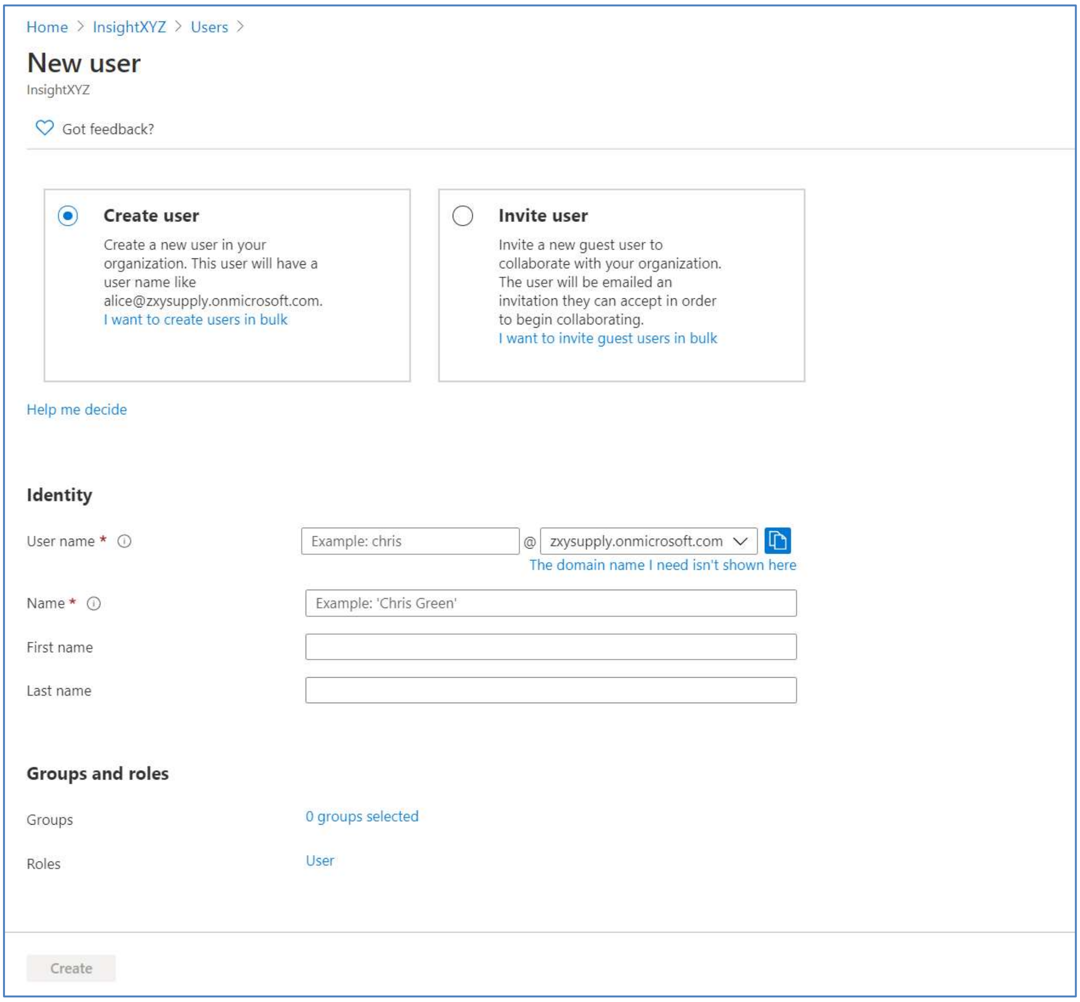
3. The **Azure Active Directory** screen should appear. Click on **Users**.



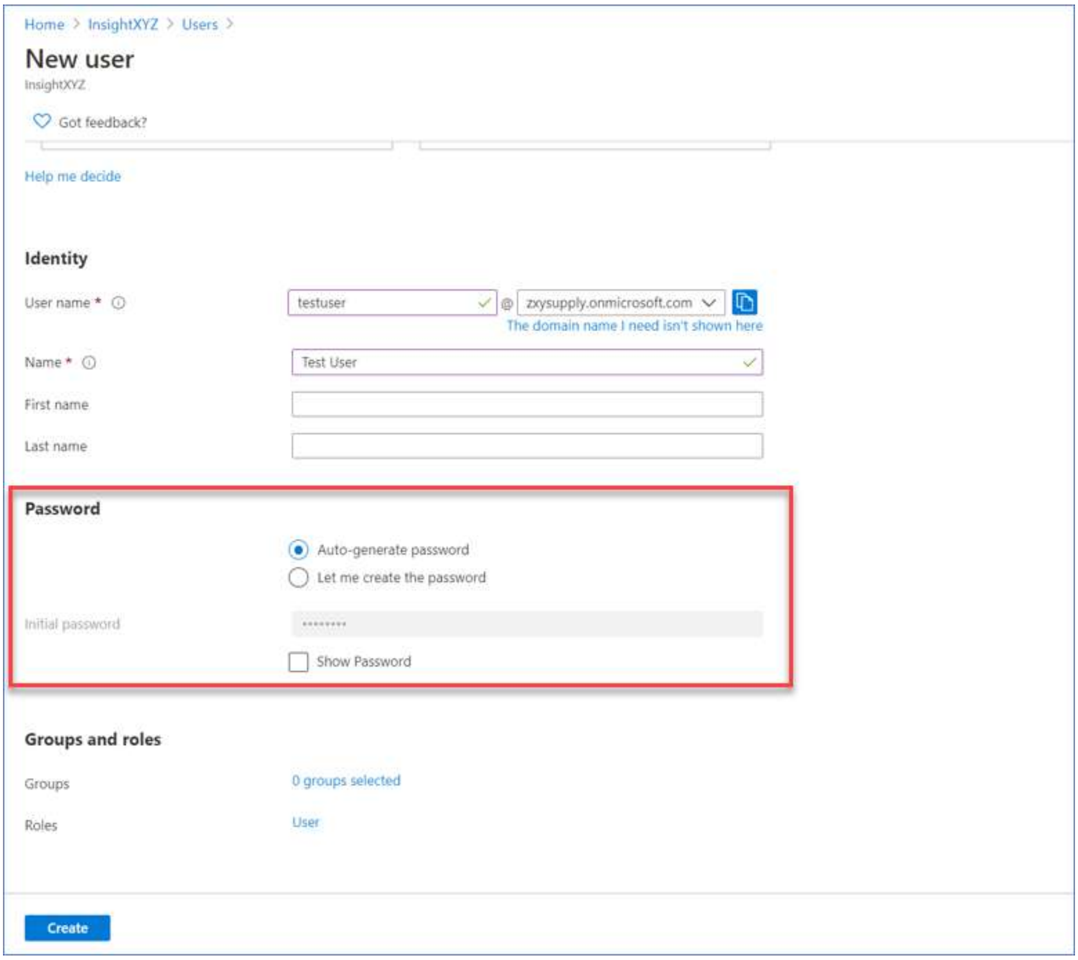
4. From the **Users** screen, click on **New user**.



5. You will now create a **New user**. Enter the details in the **Identity** section.

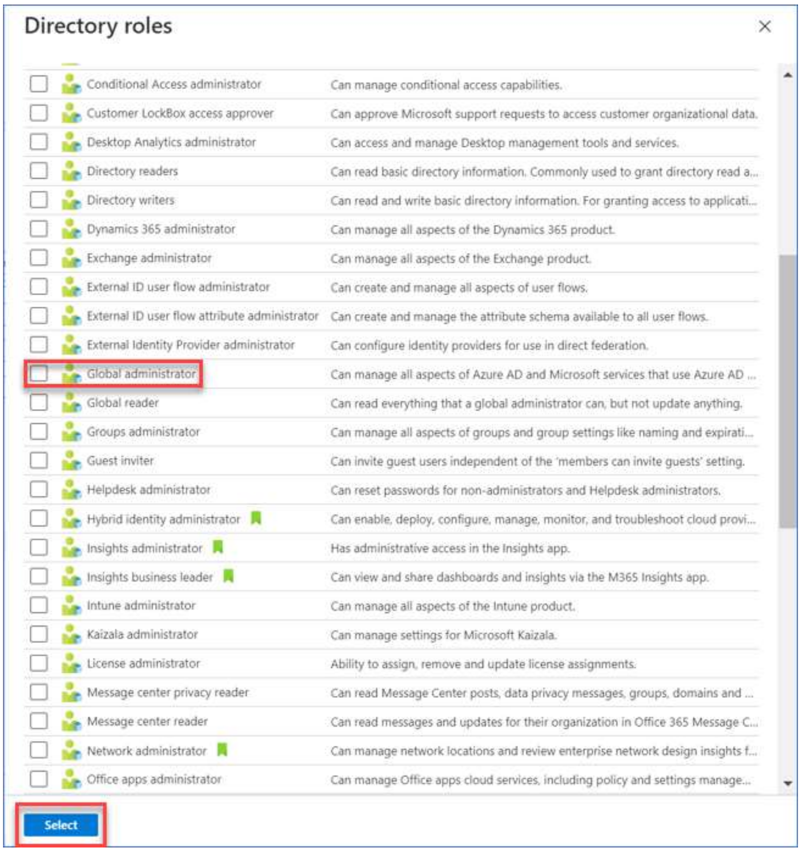


6. After you enter the information in the **User name** and **Name** fields, the section for **Password** information will display. You can either create your own password or let Azure create one for you. If you let Azure auto-generate a password, then click **Show Password** to make note of the password.

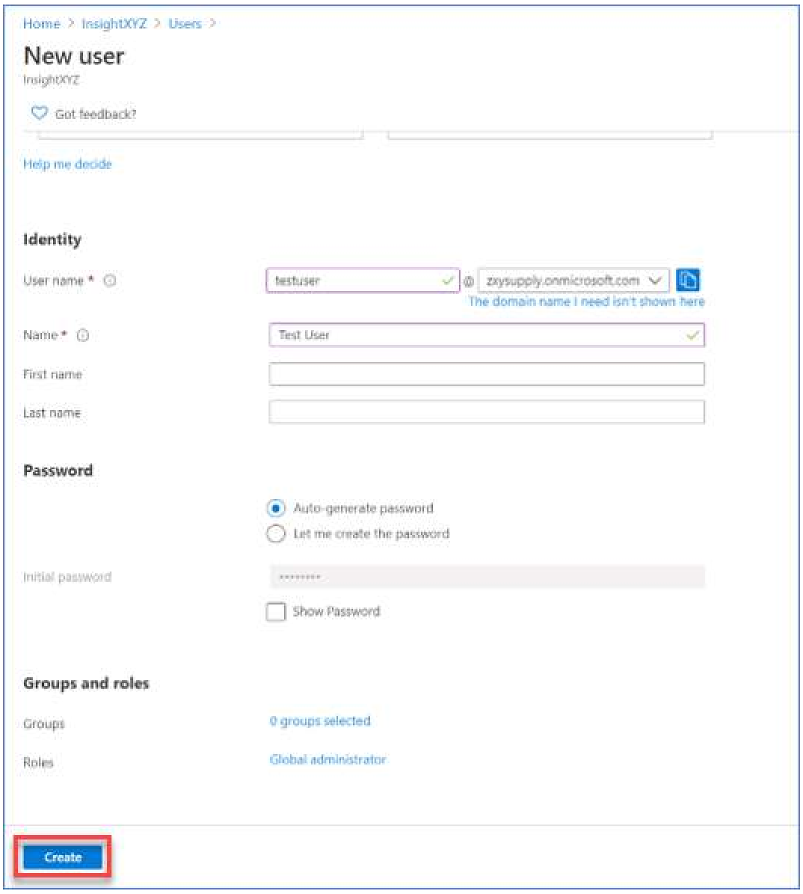


7. If you need to create a Global Admin that can create other passwords, then in the **Groups and roles** section, click on **User.** If not, skip this step.

8. From the list of roles available select **Global administrator** , then click **Select**.



9. Click **Create**, to create this new user.

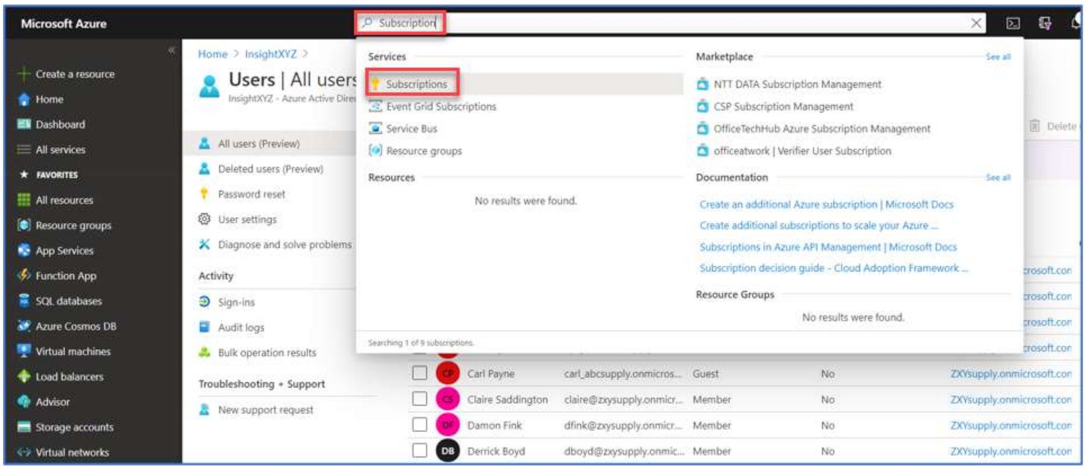


You have created an Azure user. The next step is to give this user access to the Azure subscription. Until they have access to a subscription, they will not be able to administer the Sage environment.

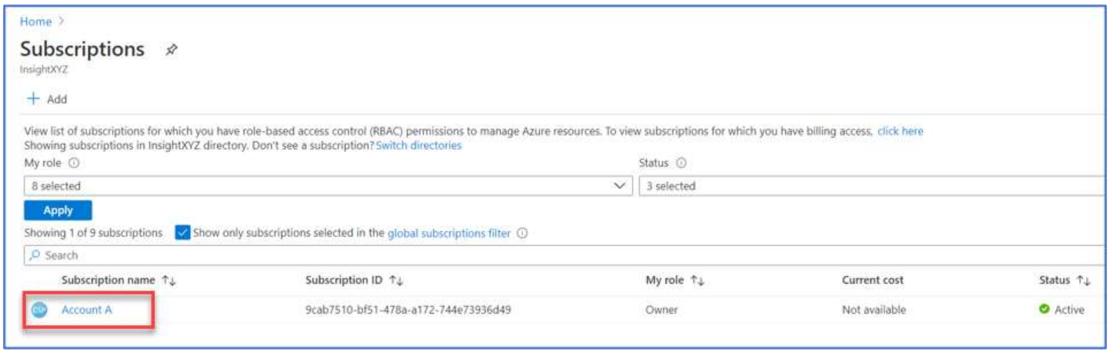
Giving Users Permissions

You now need to give the user access to the subscription that the Sage environment is provisioned.

1. In the search bar type in the word **Subscription**, then click on **Subscriptions**.

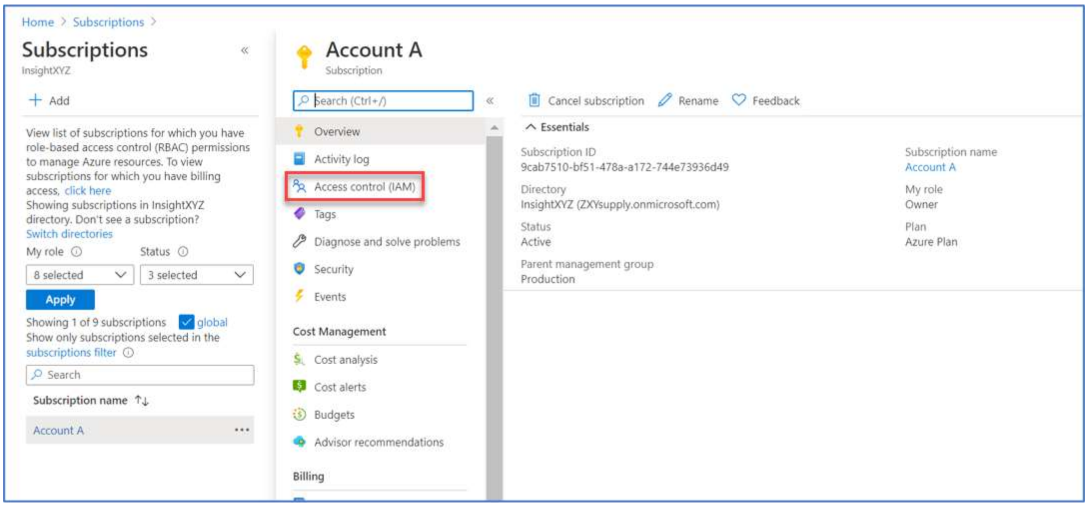


2. The **Subscriptions** screen will appear. Click on the subscription name, which may be different then what is shown below.

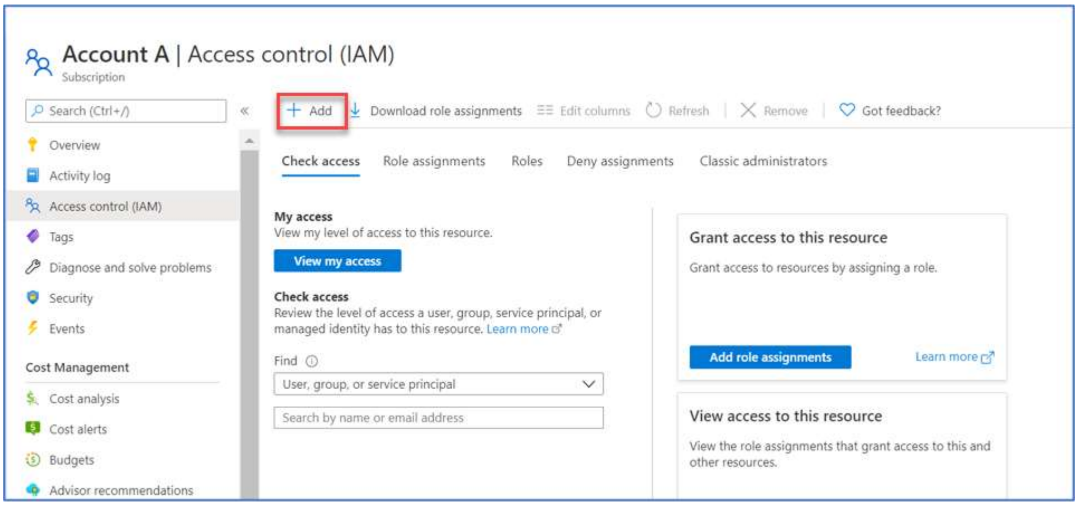


Appendix

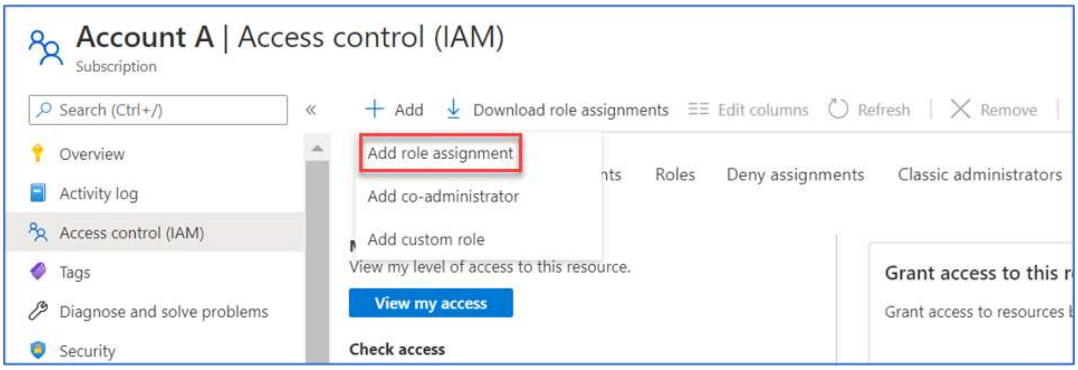
3. From the **Subscriptions** screen, click on **Access control (IAM)**.



4. From the Access control (IAM) screen, click **Add**.



5. Click **Add role assignment**.



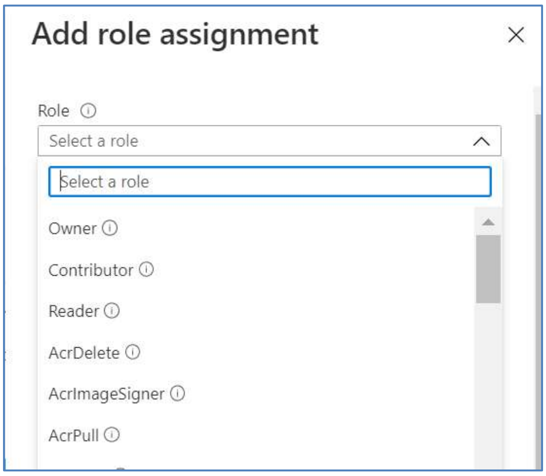
You now need to decide on the Role type that you want to give the user. The main three are displayed at the top of the drop-down list.

Owner - Has full rights and can create and delete resource.

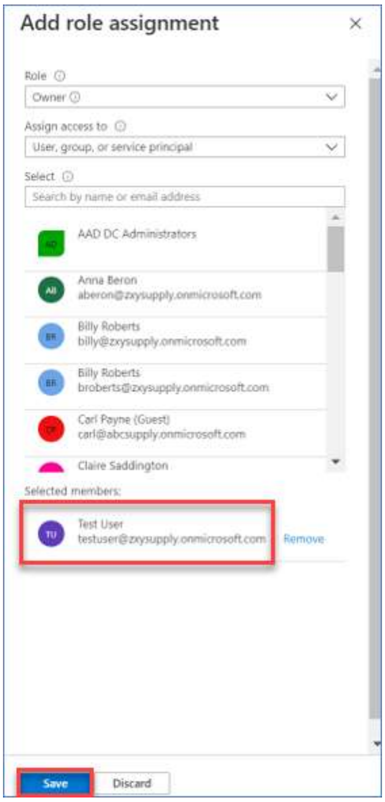
Contributor - Has full rights with the exception that they cannot delete resources.

Reader - Can only see what is in the subscription and cannot change anything.

6. Select the **Role** that you want to assign.



7. Select the **User**, then click **Save**.



This will now give the user that you have selected, permissions to access the Sage Environment that is provisioned in the subscription.

About Execution Policies

PowerShell's execution policy is a safety feature that controls the conditions under which PowerShell loads configuration files and runs scripts. This feature helps prevent the execution of malicious scripts.

On a Windows computer you can set an execution policy for the local computer, for the current user, or for a particular session. You can also use a Group Policy setting to set execution policies for computers and users.

Execution policies for the local computer and current user are stored in the registry. You do not need to set execution policies in your PowerShell profile. The execution policy for a particular session is stored only in memory and is lost when the session is closed.

The execution policy is not a security system that restricts user actions. For example, users can easily bypass a policy by typing the script contents at the command line when they cannot run a script. Instead, the execution policy helps users to set basic rules and prevents them from violating them unintentionally.

Change the Execution Policy

To change the PowerShell execution policy on your Windows computer, use the Set-ExecutionPolicy cmdlet. The change is effective immediately. You do not need to restart PowerShell.

If you set the execution policy for the scopes LocalMachine or the CurrentUser, the change is saved in the registry and remains effective until you change it again.

If you set the execution policy for the Process scope, it is not saved in the registry. The execution policy is retained until the current process and any child processes are closed.

For example:

Set-ExecutionPolicy -ExecutionPolicy RemoteSigned -Scope CurrentUser

To learn more about PowerShell execution policies, please review the following link:
https://docs.microsoft.com/en-us/powershell/module/microsoft.powershell.core/about/about_execution_policies?view=powershell-7

Azure PowerShell Command Line

For more advanced users, you can also execute the files to setup the subscription from the Azure PowerShell Command Line.

Azure PowerShell is a set of cmdlets for managing Azure resources directly from the PowerShell command line. Azure PowerShell is designed to make it easy to learn and get started with but provides powerful features for automation. Written in .NET Standard, Azure PowerShell works with PowerShell 5.1 on Windows, and PowerShell 6.x and higher on all platforms.

To learn more about Azure PowerShell go to:

https://docs.microsoft.com/es-es/powershell/azure/?view=azps-4.7.0

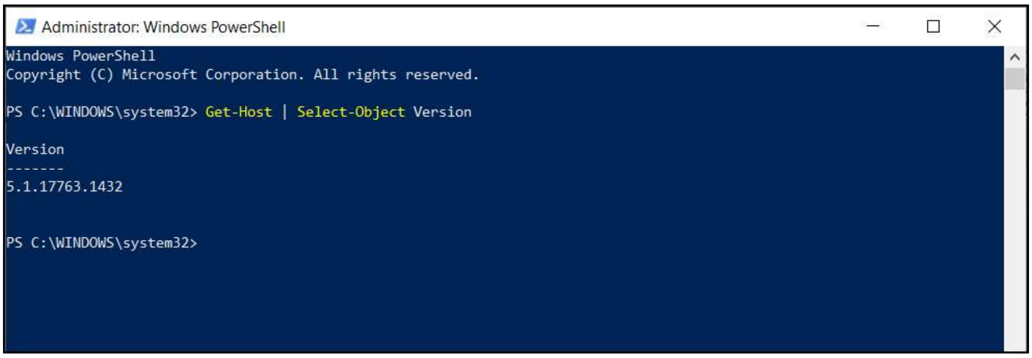
To run the PowerShell scripts from your local computer, perform the following steps:

1. Open a PowerShell session as an Administrator from your computer. Go to the Windows icon and enter PowerShell in the search field, then select Run as Administrator.

2. A Windows PowerShell session will appear.

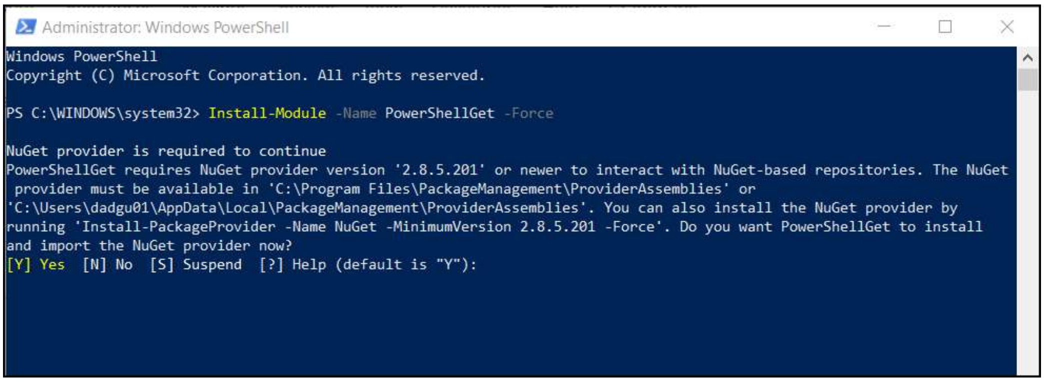
Important Note

To check the version of PowerShell on your machine, enter the following command:
PS C:WINDOWS\system32> Get-Host | Select Object Version



3. First, execute the following command:

   PS C:\WINDOWS\system32> Install-Module -Name PowerShellGet -Force

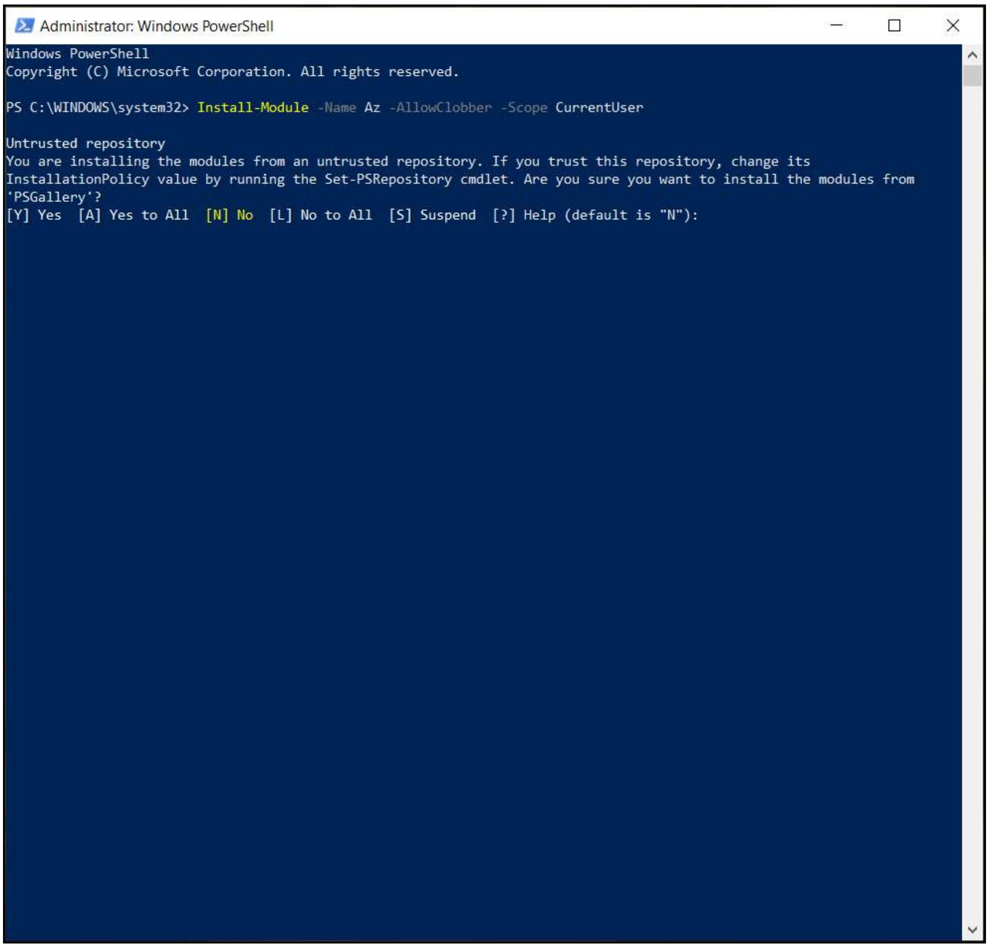


Important Note

If you get the following message, select Yes (Y) to allow PowerShell to install and import the NuGet provider.

4. Next, execute the following command:

PS C:\WINDOWS\system32> Install-Module -Name Az -AllowClobber -Scope CurrentUser

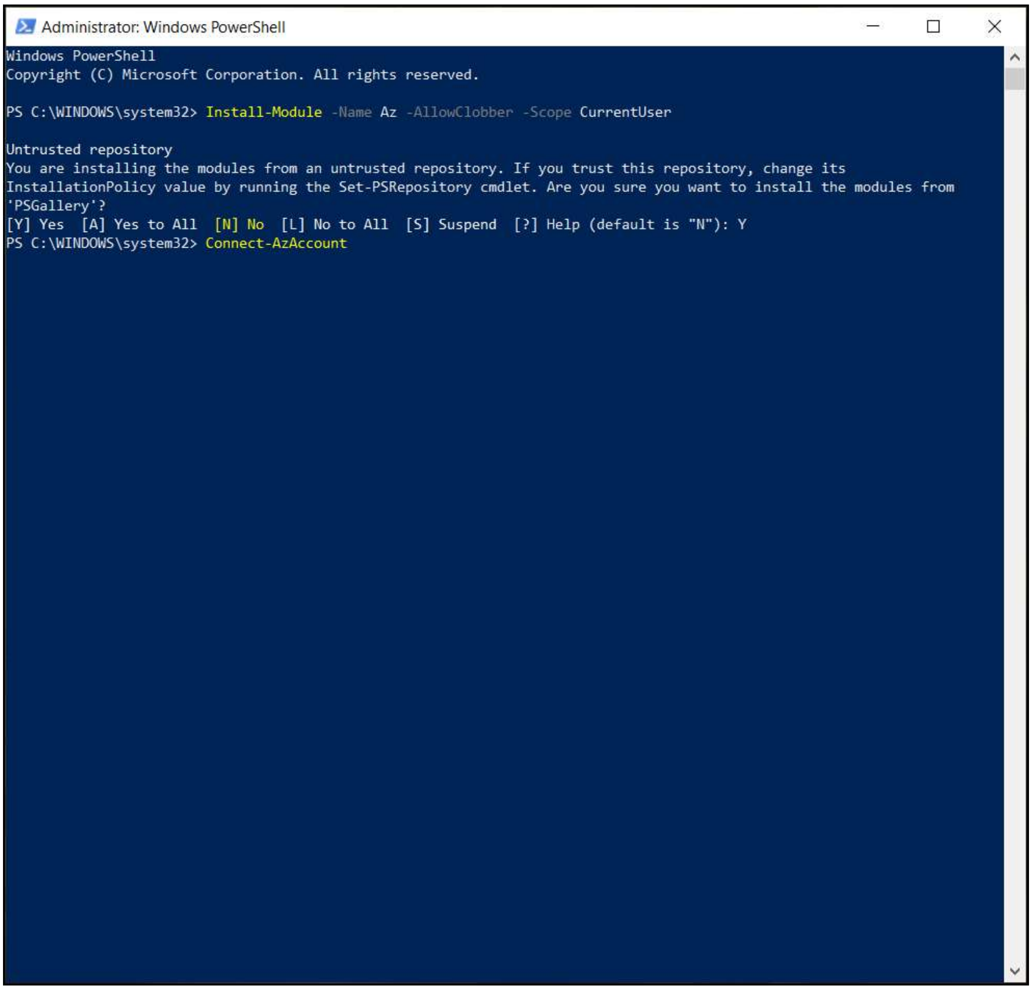


Important Note

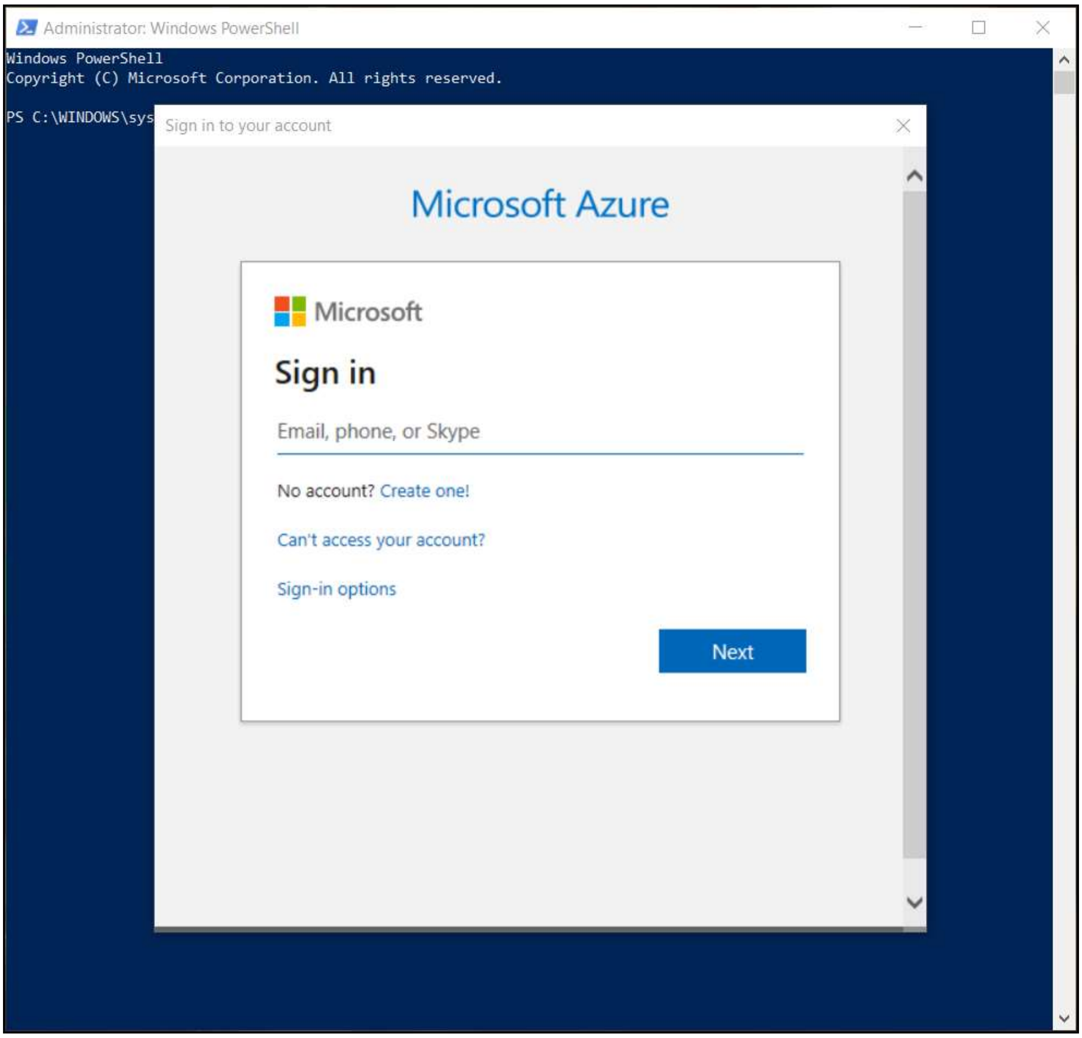
If you get the Untrusted repository message, select Yes to All (A) to trust this repository.

5. Now, sign in to your Azure account using the following command:

   PS C:\WINDOWS\system32> Connect-AzAccount



6. Sign in to your Microsoft Azure account.



7. Once you have signed into your Microsoft Azure account, go to the folder where you extracted the files on your computer:

    PS C:\WINDOWS\system32> cd \ConfigureSageADIdentity-*subscriptionId*

Important Note

In the file name 'ConfigureSageADIdentity-subscriptionId', the subscriptionId will be your Azure subscription ID.

8. Finally, run the ps1 file using this command:

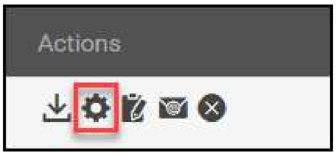
   PS C:\WINDOWS\system32> .\ConfigureSageADIdentity-subscriptionId.ps1

Important Information

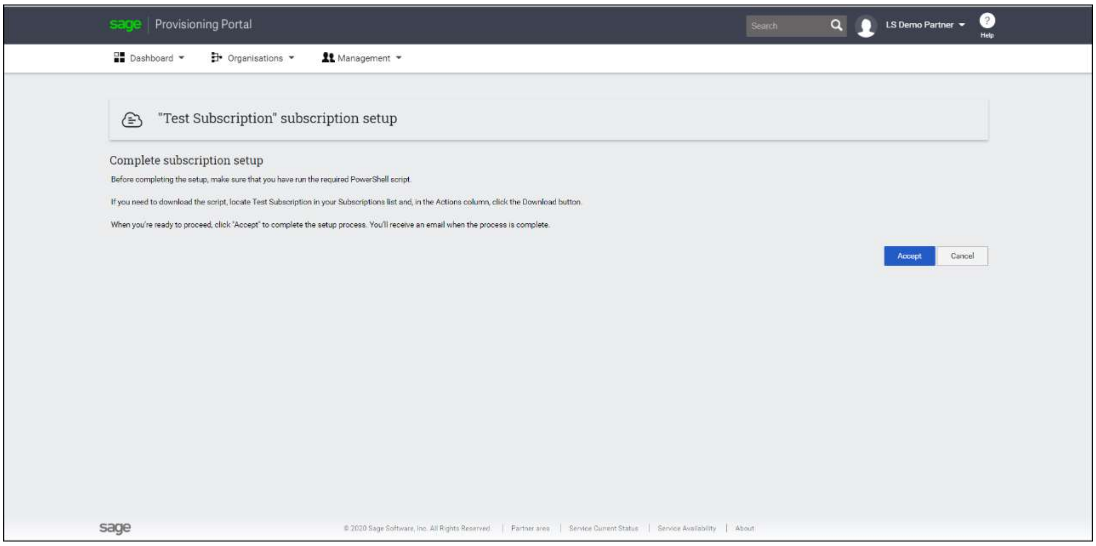
For additional support Installing the Azure PowerShell, review the following article:
https://docs.microsoft.com/es-es/powershell/azure/install-az-ps?view=azps-4.7.0

Once you have run the PowerShell file, you can now setup the subscription in the Sage Provisioning Portal.

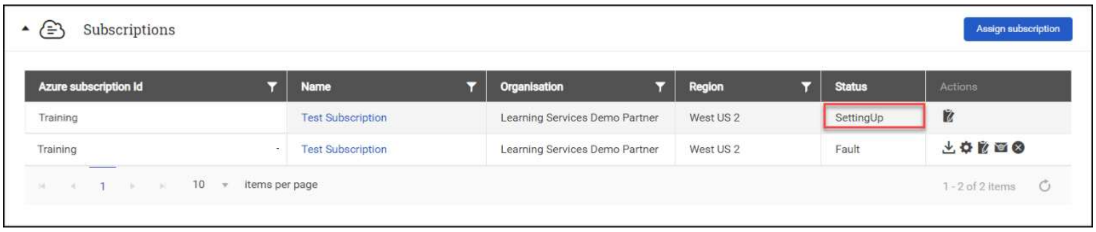
9. In the partner details, go to the **Subscriptions** panel. Notice that the status is showing **Pending Setup** for the new subscription.
10. Hover over the **Actions** column for the new subscription, then click on the **Setup Subscription** icon.



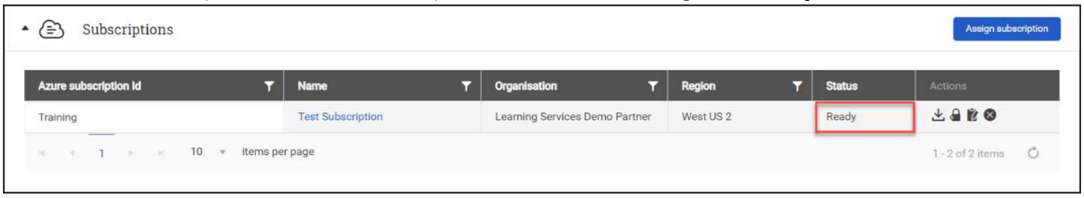
11. Review the note to complete the subscription setup, then click **Accept**.



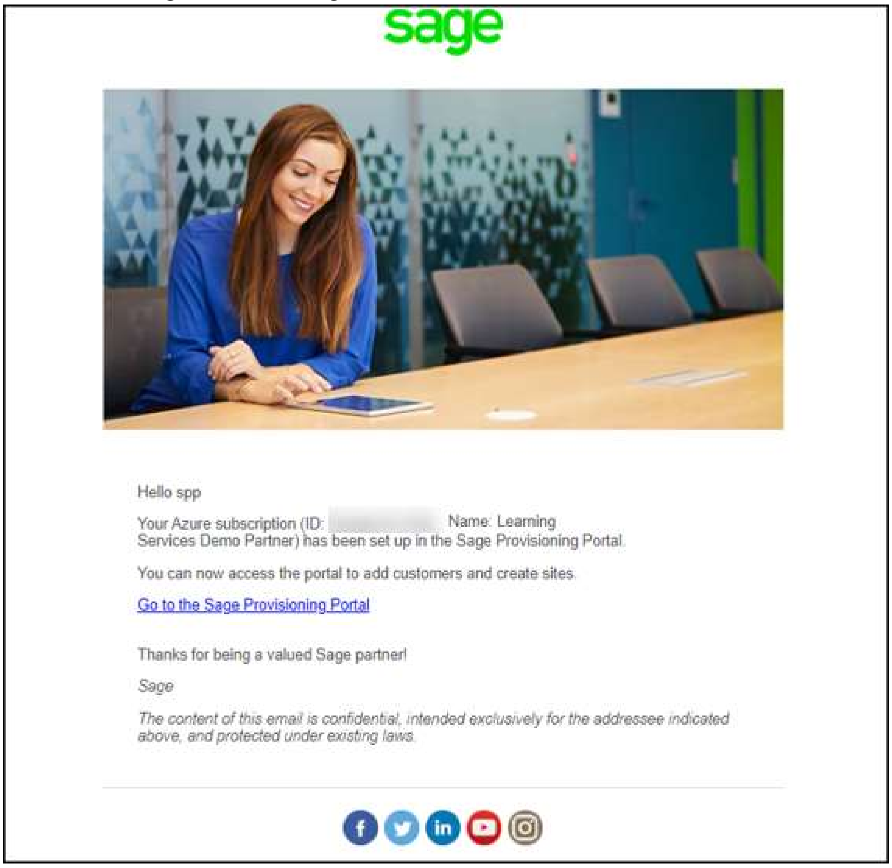
12. You will see that the status has changed to **Setting Up**. The setup process may take an hour to complete.



13. You can use the View Logs icon to display the logs for the subscription setup. This option is useful for troubleshooting setup issues.
14. Once the Subscription has been setup the status will change to **Ready**.



15. You will then receive an email informing you that the subscription has been setup, and that you can now access the Sage Provisioning Portal to add customers and create sites.


Hello spp

Your Azure subscription (ID: Name: Learning Services Demo Partner) has been set up in the Sage Provisioning Portal.

You can now access the portal to add customers and create sites.

Go to the Sage Provisioning Portal

Thanks for being a valued Sage partner!

Sage

The content of this email is confidential, intended exclusively for the addressee indicated above, and protected under existing laws.

Office Deployment Tool

The Office Deployment Tool (ODT) is a command-line tool that you can use to download and deploy Click-to-Run versions of Office, such as Microsoft 365 Apps for enterprise, to your client computers.

When installing Office in the Virtual Machines provisioned in Azure, you will have to use the Office Deployment Tool that can be found here:
https://www.microsoft.com/en-us/download/confirmation.aspx?id=49117

What Microsoft 365 / Office 365 plans are supported with Sage Partner Cloud?

Microsoft licenses are necessary to install Excel on the VM with Sage Partner Cloud.

To use shared computer activation, you need an Office 365 (or Microsoft 365) plan that includes Microsoft 365 Apps and supports shared computer activation.

Shared computer activation is available for the following:
- Any plan that includes Microsoft 365 Apps for enterprise (previously named Office 365 Plus). For example, Office 365 E3 or Microsoft 365 E5.
- Any plan that includes the desktop version of Project or Visio. For example, Project Plan 3 or Visio Plan 2.
- The Microsoft 365 Business Premium plan, which includes Microsoft 365 Apps for business.

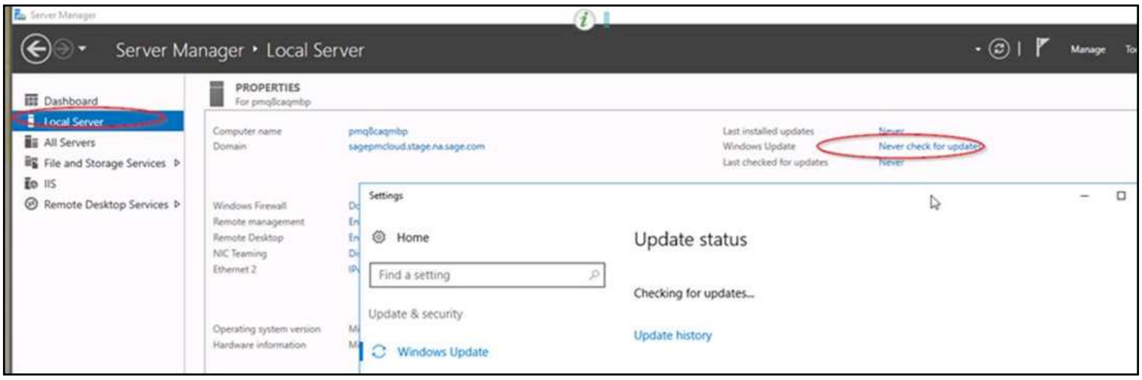
If you do not have one of these license types, you have two options:
- Upgrade your existing Microsoft license.
- Contact your Partner to purchase an Excel license via Insight SPLA.

Windows Update

When needing to run a Windows Update, you should log in as Local Admin to desktop and follow these steps:

1. In Windows Services enable Windows Update and start the service.
2. From Server Manager, select Local Server and click on the Never check for updates link. This redirects to Windows Settings UI and proceeds to update Windows.
3. After reboot, stop Windows Update and disable to avoid unwanted interruption when people are in the system

Restarting may take some time to completely load all the windows components.



Selecting a Mode to Run Applications

In the Programs section of the home page, you have two options for running applications:

- Browser Mode
- Desktop Mode

When you select Browser mode, the Desktop Access button may be available based on the permissions granted to you by your system administrator.

Browser Mode

Browser mode, in which the applications open in a browser window, provides flexibility in that nearly all browsers and nearly all hardware is supported. You can access Sage data from your computer, tablet, phone, or even your smart TV.

However, there are limitations in terms of printing and other features. These limitations are described in the table below.

Desktop Mode

Desktop mode uses a remote desktop protocol (RDP) to connect to the virtual machine (VM) on which your Sage application is installed. This mode mimics the experience of running an application that is installed on your computer. The process of completing tasks such as printing reports and opening multiple windows at the same time is virtually identical regardless of whether the application is locally installed or in the cloud.

However, Desktop mode is supported only on computers running the Windows operating system, and it only works when you sign in to the home page using Internet Explorer.

Desktop Access

When you click the Desktop Access button, you will establish a remote desktop connection with the virtual machine on which your Sage application is installed. You are signed in to the virtual machine through your browser, but unlike when using the Browser mode, you will see the Windows Start menu and taskbar, and you can access other applications that are installed on the VM. Depending on the level of access assigned to you by your system administrator, you may be able to install applications and perform other administrative tasks.

The table below describes some of the benefits and limitations of the Browser mode and the Desktop mode.

	Browser Mode	**Desktop Mode**
Best for	Anytime, anywhere use	Recreating the desktop experience of locally installed applications
Access	Computers running Windows or macOS, mobile phones and tablets, almost any device that supports a modern browser.	Limited to desktops running Remote Desktop Protocol (RDP). Only Windows-based computers are supported.
Printing	Printing is managed through the browser. Reports are created as PDFs and you can print reports to any local printer.	When the RDP connection is made, if printers are connected, the server can print directly to any connected server or local printer. Multi-part forms can be sent to print to multiple printers or to alternate trays.
File access	The data drive connection is made through the portal to exchange files between the virtual machine and your local computer. The file exchange process is like using Dropbox or OneDrive.	When the RDP connection is made, if drives are connected, the local system will be able to connect to the virtual machine and vice-versa. Files can be exchanged through Windows File Explorer.
Multi-tasking	The connection to the virtual machine is streamed through the browser so the number of active windows is limited to the screen real estate provided by the browser itself. Expanding the browser to its maximum size will provide more concurrently viewable windows. Finding individual windows can be challenging if there are several of them competing for window real estate.	Each window that opens through the RDP client appears on your local computer's task bar and functions as if it were started from a locally installed application. A small RDP icon in the task bar indicates that the process is running through RDP. Your local computer can then manage each of these windows independently, supporting multiple monitors and allowing you to easily manage multiple windows.