Installing SOX Check Approval Web Screens

This guide provides instructions for installing SOX Check Approval Web Screens for SOX Check Approval 2018-2023.

- ***If you are upgrading SOX Check Approval from a previous version,*** see *"Updating to SOX Check Approval - 2018-2023".*

    o Note that you must install the Desktop program for SOX Check Approval **_before_** you install the web screens for SOX Check Approval.

Note the following points:

- ***Do not install SOX Check Approval Web Screens <u>unless</u> you use Sage Web Screens.***

    Web screens are launched from Sage 300cloud running in a web browser. You cannot use SOX Check Approval Web Screens unless you are running Sage 300 in a web browser.

- **Web screens are <u>version-specific</u>.**

    This package provides web screens for Sage 300 version 2021, 2022, and 2023. You must install web screens that match your version of Sage 300.

- **Web screens only provide the UIs** for running programs in an internet browser. You must install the Desktop version of SOX Check Approval in order to run the program.

Installation Files for SOX Check Approval Web Screens

The SOX Check Approval Web Screens "Download" zip file contains 6 installation files that support 3 different versions of Sage 300.

You must use the installation files that match your version of Sage 300.

- Sage 300 version 2023_0   *for the original release of Sage 300 2023*
    o TCSAWeb_2023_0_setup.msi   -- installs Web Screens
    o TaiRox.SCA.Customization_2023_0.zip   -- installs A/P Batch List button

- Sage 300 version 2022_2   *for Sage 300 2022.2 and higher (e.g. PU2, PU3)*
    o TCSAWeb_2022_2_setup.msi   -- installs Web Screens
    o TaiRox.SCA.Customization_2022_2.zip   -- installs A/P Batch List button

- Sage 300 version 2021_*2*   *for Sage 300 2021.2 and higher (e.g.* PU5, PU6*)*
    o TCSAWeb_2021_2_setup.msi   -- installs Web Screens
    o TaiRox.SCA.Customization_2021_2.zip   -- installs A/P Batch List button

You import the Payment Batch List customization using the Sage 300 Web Admin Configuration application.

Note regarding the Web version of SOX Check Approval

Web screen installation files are Sage 300-version-specific. You must install a web version that matches your version of Sage 300. This package includes installation and customizations files for Sage 300 version 2021 (PU2 and higher), 2022 (PU2 and higher), and 2023.

Steps for Installing Web Screens

Before you install:

- *If you previously installed the Web Screens, uninstall "TaiRox SOX Check Approval Web Screens" from all computers running Sage 300 applications.*

- *Run "iisreset" after uninstalling prior versions of SOX Check Approval Web Screens, and clear your browser's cache of temporary Internet files.*

- Install the new Check Approval software on all computers running Sage 300 applications using the following installation file.

  Desktop-2018-2023.msi

  <u>*Run RegAcc.exe on each workstation that runs Sage 300 from a server*</u> (or run Workstation Setup with "repair").

- Activate the new version of SOX Check Approval if you are updating from a version <u>prior to</u> <u>SOX Check Approval 2018-2021</u> (January 2021).

To install SOX Check Approval Web screens:

1. Install the new Check Approval Console Web Screens where the Sage 300 Web Screens are installed, using one of the following installation files.

   TSCAWeb_2023_0_setup.msi – for Sage 300 – original release
   TSCAWeb_2022_2_setup.msi – for Sage 300 version 2022 with PU2 or higher
   TSCAWeb_2021_2_setup.msi – for Sage 300 version 2021 with PU2 or higher

2. Delete any existing customizations for the A/P Payment Batch List Web Screen from prior versions of SOX Check Approval.

   - Login to the Sage 300 Web Screen Admin Configuration application.
     <web server>/Sage 300/Admin

   - *Delete any prior version of the A/P Payment Batch List Web Screen customization. (Select it from the Package ID dropdown and click the Delete button.)*

3. Import the new customization package for A/P. See [Installing Sage 300 Web Screen Customizations](#) for details on importing – and deleting – customization packages.

   Using one of the following customization files:

   TaiRox.SCA.Customization_2023_0.zip – for Sage 300 – original release
   TaiRox.SCA.Customization_2022_2.zip – for Sage 300 version 2022 with PU2 or higher
   TaiRox.SCA.Customization_2021_2.zip – for Sage 300 version 2021 with PU2 or higher

   - Login to the Sage 300 Web Screen Admin Configuration application.
     <web server>/Sage 300/Admin

   - *Use the Browse button to find TaiRox.SCA.Customization_202n_n.zip.*

   - *Use the Import button to import it.*

   - *Use the Assign button to assign it to the Sage 300 company database.*

   Run "iisreset" after installing the SOX Check Approval Web Screen customizations and clear your browser's cache of temporary Internet files.
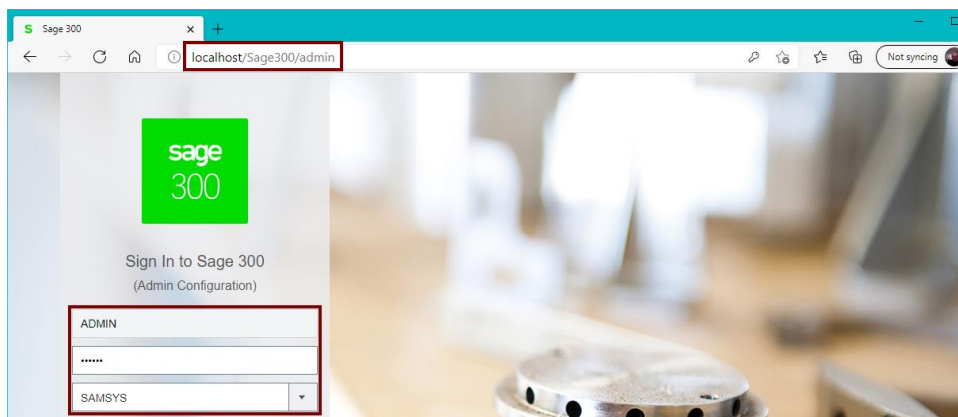
   See [Clearing Your Browser Cache After Installing Customizations](#).

Installing Sage 300 Web Screen Customizations

Follow these instructions to install the Web Screen customization package for SOX Check Approval. The customization package adds a button to the A/P Batch Payment list for submitting payment batches for approval and for checking the approval status of submitted batches.

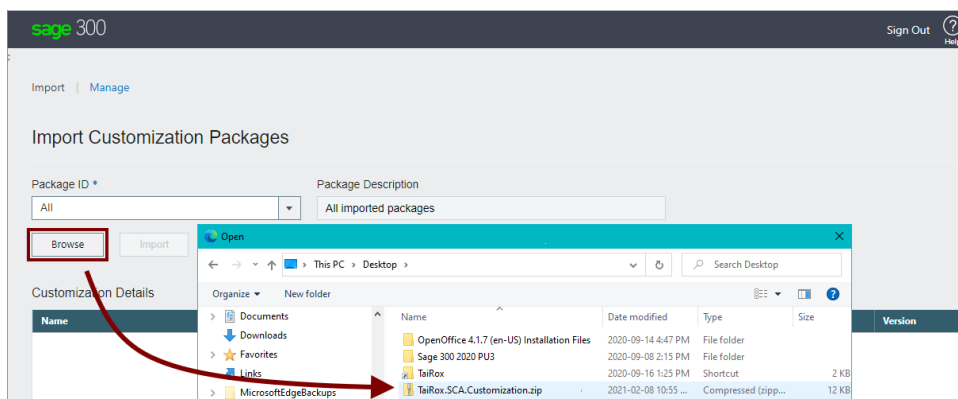**To install Web Screen customization packages for Sage 300cloud:**

- Install the latest version of SOX Check Approval and SOX Check Approval Web Screens.

- Copy the customization zip file for SOX Check Approval Web Screens (for example, TaiRox.SCA.Customization_202*n_n*.zip) to a convenient location. You will need to find it easily to import it.

- Open your browser and browse to ***<Sageserver\instance>/*Sage300/admin** to open the Sage 300 admin portal.

- Select the System database, and sign in with an Admin password.

On the Import Customizations screen:

- Click the Browse button and find the Customization zip file (TaiRox.SCA.Customization_202*n_n*.zip).

- Double-click the zip file to select it, and click Import button.)

- Click the Assign button at the bottom of the Import screen, select the companies that use SOX Check Approval, and click OK.

- Sign out of Sage 300 and exit the browser.

- Open a Command prompt and enter **iisreset** to restart iis.

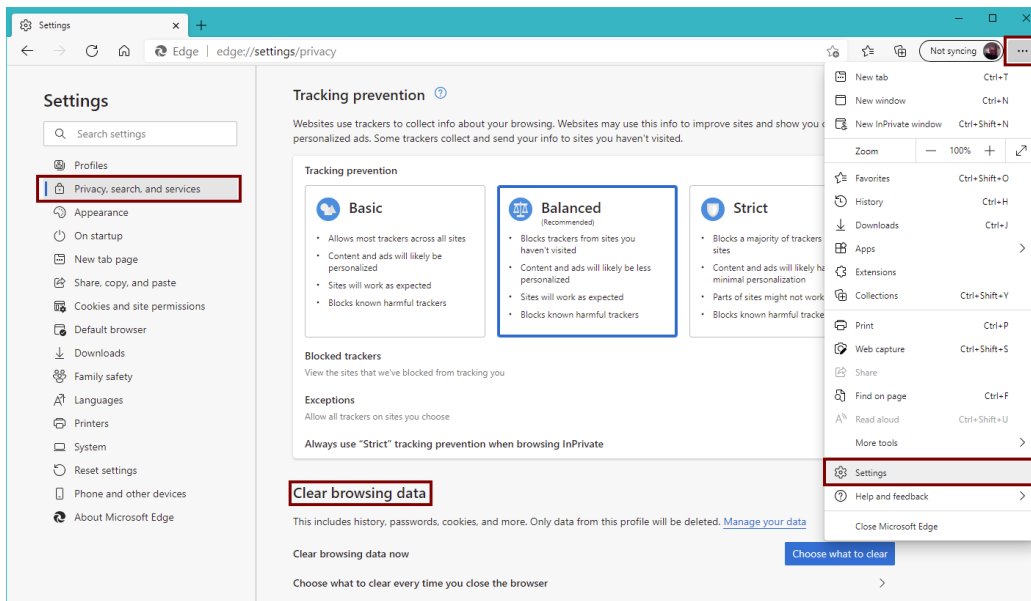- Verify the installation by signing in to the Sage 300 portal and opening the AP Payment Batch List program.

Clearing Your Browser Cache After Installing Customizations

> **Note that all users should clear their browser caches when
> you update to a new version of Sage 300 or TaiRox Web screens.**
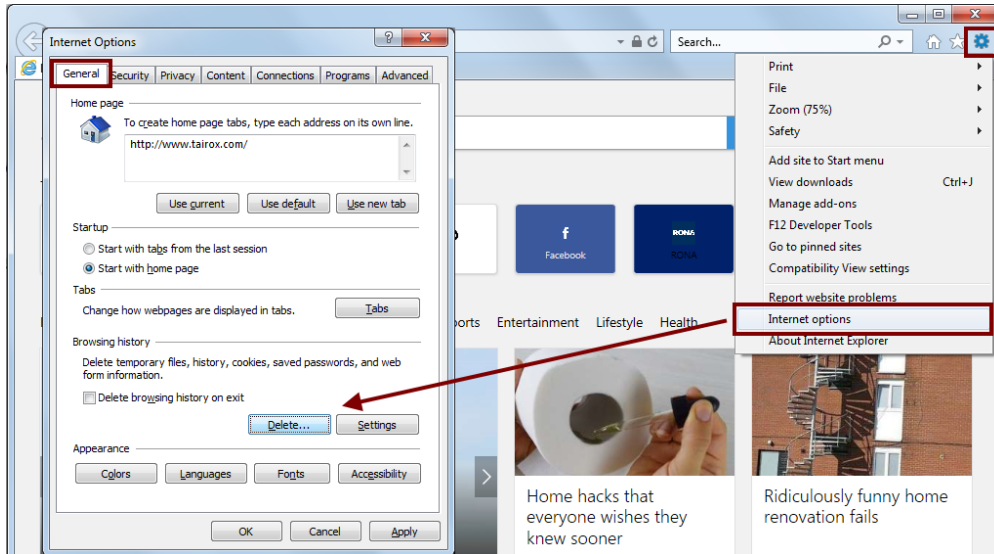
Follow these instructions to clear the cache on different browsers:
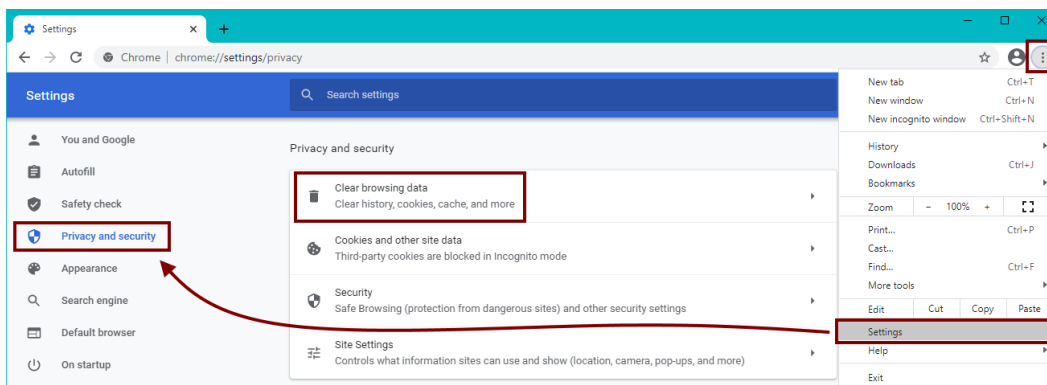
Microsoft Edge

1. Click the **Settings and More** button in the upper-right corner to display the menu.
2. Select **Settings** from the Menu.
3. Select **Privacy, Search, and Services** from the Settings Menu.
4. Scroll down to **Clear Browsing Data**.
5. Click the **Choose What To Clear** button.
6. Select a Time Range of **All Time**.
7. Check **Cached Images and Files**. You can uncheck the other data if you want to keep it.
8. Click the **"Clear Now"** button.
9. Close ALL Edge browser windows
10. Restart Edge and sign on to Sage 300 again.
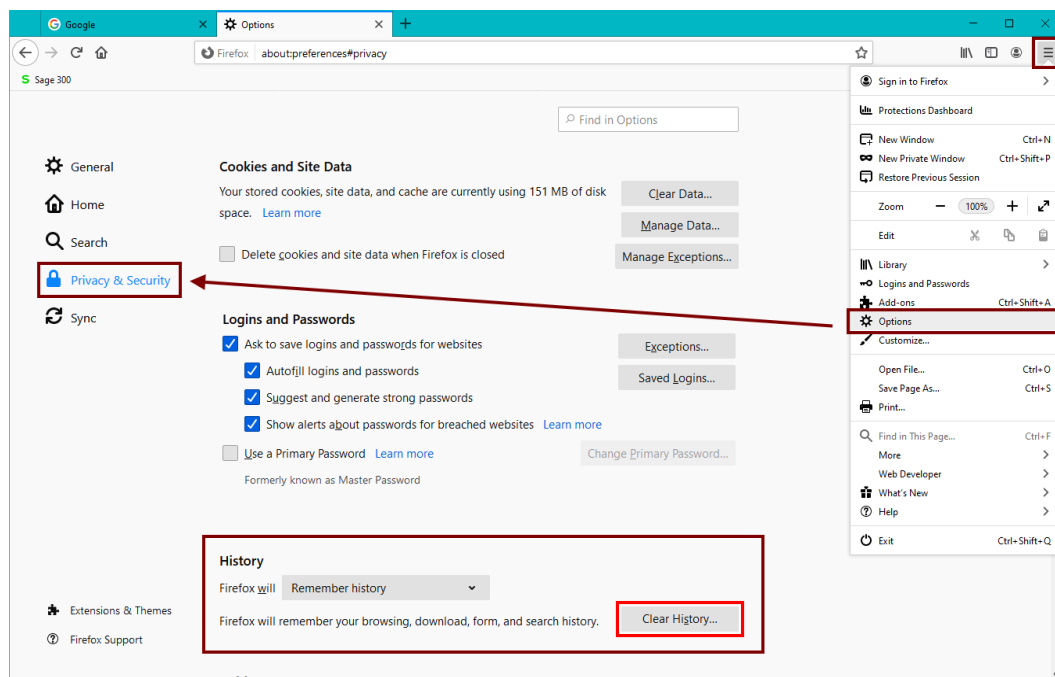
Internet Explorer

1. Go to the **Tools** menu (click button in the upper-right corner to display the menu).

2. Select "**Internet Options"** from the menu.

3. Under the **General** tab, **Browsing History** section, click on the **Delete** button

4. Check/select only the following items on the list:
   o   Preserve Favorites Website data
   o   Temporary Internet Files and Website files

5. Uncheck/deselect the rest of the items on the list, especially the **Passwords** item.

6. Click **Delete**.

7. Wait for the message **Internet Explorer has finished deleting the selected browsing history** to appear at the bottom of the page.

8. Click **Apply.**

9. Click **OK.**

10. Close ALL Internet Explorer browser windows.

11. Restart Internet Explorer and sign on to Sage 300 again.

Google Chrome

1. Click the **Settings** button (in the upper-right corner of the browser window).
2. Select **Settings**.
3. Select **Privacy and Security** on the Settings menu.
4. Click **Clear browsing data**.
5. Select **All Time** on the dropdown menu.
6. Check/select the following item on the list:
   - Cached images and files
7. Uncheck/deselect the rest of the items on the list, especially the **Passwords** item.
8. Click the **Clear data** button.
9. Close ALL Google Chrome browser windows
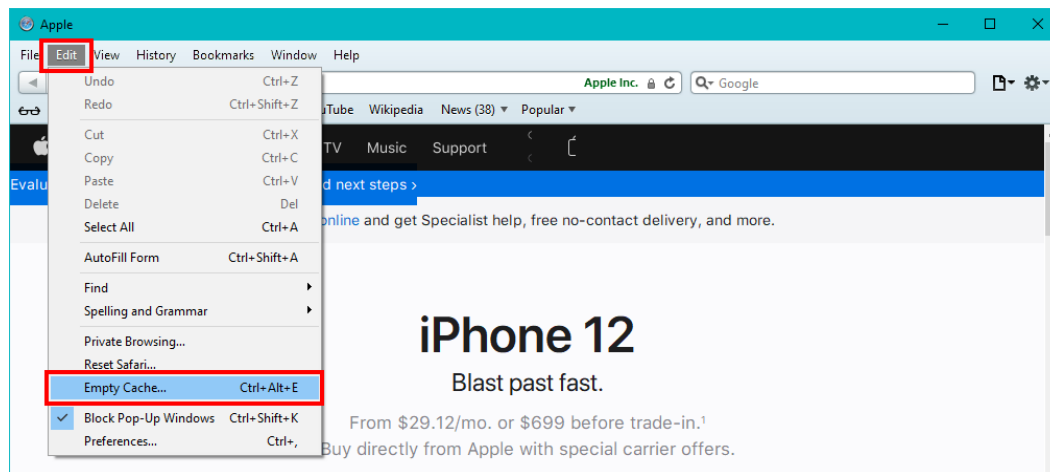10. Restart Google Chrome and sign on to Sage 300 again.
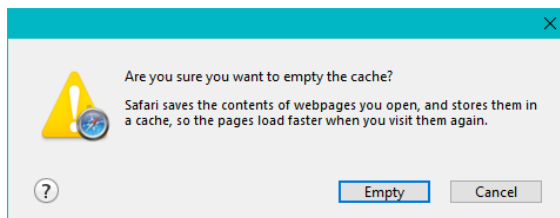
Mozilla Firefox

1. Click on the menu button (three bars in the upper-right corner of the browser window).
2. Select **Options**.
3. Select **Privacy and Security** from the Options menu.
4. Scroll down to the **History** section and click the **Clear History** button.
5. For "Time Range to Clear", select **Everything**.
6. Check/select only the following item on the list
   - Cache
7. Uncheck/deselect the rest of the items on the list, especially the **Active Logins** item.
8. Click the **OK** button.

9. Close ALL Mozilla Firefox browser windows

10. Restart Mozilla Firefox and sign on to Sage 300 again.

Apple Safari

1. Select **Edit** on the menu bar.

2. Select **Empty Cache**.

3. Click **Empty**.

4. Close ALL Apple Safari browser windows

5. Restart Apple Safari and sign on to Sage 300 again.