

SOX Check Approval Web Screens

This document describes, conceptually, the SOX Check Approval installation process. It is not a detailed set of step-by-step instructions.

The web screen installation process involves using the [Sage 300 Web Screen Admin Configuration](#) program to install ("import") and configure ISV modules ("customizations"). When upgrading, this program is also used to uninstall ("delete") older versions.

TaiRox offers a paid service for consultants unfamiliar with Sage's web screen tools for ISVs and their interactions with IIS. Consultants can watch and record TaiRox staff performing this service.

TaiRox strongly recommends that SOX Check Approval upgrades be done in a test environment such as a virtual image with a snapshot (aka checkpoint).

#1 You Need to Use the Desktop Programs

You need to use the Sage 300 Desktop programs for Data Activation, entering the SOX Check Approval License, and creating the approval database tables. The approval database is used for multiple Sage 300 companies and is not a Sage 300 company database itself. The desktop installation sub-classes the A/P views to enforce approvals. For upgrades, the mechanisms to do any database conversions on the approval database are part of the desktop application.

In general, getting SOX Check Approval running smoothly on the desktop is a good first step, even if users will only be using the web screens. Follow instructions in the desktop user guides.

#2 You will need some familiarity with IIS

Depending on how your network is set up, you may need to be aware of commercial or self-signed certificates.

#3 Plan an Upgrade Carefully

Conceptually, you need to:

- Complete the approval process for any outstanding A/P payment batches.
- Uninstall the old customization (that takes control of the A/P web screen)
- Uninstall the old web screens
- Uninstall the old desktop programs
- Install the new desktop programs
- Perform data activation if required
- Update the approval database if required
- Install the new web screens
- Install and configure the new customization
- You will need to clear browser pages cached by IIS.

Do this in a test environment until you have the process down. This takes time. Using a snapshot / checkpoint can save time. You don't want to get your client into a state where they cannot process payments.