Sage Enterprise Intelligence 7.2

Sage CRM Templates Installation Guide

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About this guide

This guide is aimed at system administrators who have a good understanding of the Sage CRM technical architecture and the installed database management system. A good understanding of Windows, web applications architecture, and web servers is also required.

The guide explains how to configure the Sage Enterprise Intelligence (SEI) data source environment for Sage CRM, and how to import the Sage CRM templates into SEI. You should read the whole document before attempting any installation.

The guide should be used in conjunction with training on SEI installation and administration. It should not replace training.

Configure data sources in SEI

You must configure at least one environment to use Sage CRM data. You can create any number of additional environments, each with several data sources. For example, you might have a Sage CRM installation running on a test server, another on a production server, and a third running on a development server. In this case, you could create three environments in SEI; one for each Sage CRM installation.

1. Click **Administration | Manage Env. & D.S**.
2. Click **Add an Environment** and enter an environment name. Alternatively, use the default Production environment.
3. Click **Add a Data Source**.
   - Enter Sage CRM in **Datasource description**.
   - Choose **SQLSERVER** from **Type**.
   - Enter the server instance name in **Server**. This is the value of the Default Database Server field in Sage CRM. To view information about the Sage CRM database, open Sage CRM and click **<My Profile> | Administration | System | Database**.
   - Enter the name of the CRM database in **Database name**. For example, CRMSEI.
   - Enter CRMSEI.dbo in **Database schema name**. This is the Sage CRM database name followed by .dbo.
   - Enter CRMSEI.SEI_CRM in **SEI schema**. This is the schema for the SEI object.
   - Choose the authentication strategy (usually UseSpecific).
   - Enter the database user name and password.
4. Click **Save**.

Import the installation template

To import the Sage CRM templates, follow steps 1 to 7 below. To import the Sage CRM and Sage Business Management Solution (combined) template, follow steps 1 to 9 below.

1. Click **Administration | Templates | Import installation template**.
2. Select the folder to which the new templates will be installed. This is usually the root folder. Click **Next**.
3. Click **Select files**.
4. Navigate to the folder where you saved the template file. The name of the file depends on the Sage CRM version and database type. Select the file and click **Open**. The file is imported.
5. Click **Please bind a data source** beside the data source description and choose a data source. For Sage CRM templates, map the Sage CRM data source description to the data source you created in Configure data sources in SEI. For the Sage CRM and Sage BMS (combined) template, map the BMS data source description to the BMS data source.
6. Click **Next**.
7. Ensure all template content is marked as **Add** and click **Next**.
8. Enter a value for **SEI Schema for Custom Objects**. This schema stores custom objects created for SEI to keep them separate from the Sage CRM object. If you have just one schema for Sage CRM, you could set **SEI Schema for Custom Objects** to SEI. Alternatively, use a value that's related to your environment. For example, SEI_PROD for your production server and SEI_TEST for your test server.
9. Enter a value for the **SEI Schema for the SEI Object**.
10. Click **Next**.

Verify import scripts

When a template is imported, an execution report is displayed that lists all scripts that were executed during the import.

- A green tick icon indicates a script that ran successfully. Click the icon to open a detailed report about the script.
- A red fail icon indicates a script that failed to run. Click the icon to open a report preview window which displays the script. You can copy the script, debug it and run it. Alternatively, if you're proficient in SQL, you can debug it in the report preview window and click **Try to rerun**.

Add a new environment

You can create a new environment in an installation that already includes the Sage CRM templates.

1. Click **Administration | Manage Env. & D.S**.
2. Click **Add an Environment** and enter an environment name.
3. Add a data source. See Configure data sources in SEI.
4. Click **Save**.
5. Enter a value for **SEI Schema for Custom Objects**.
6. Click **Run**.
7. Click **Yes** to drop all SQL objects. The SQL objects are created and the results are displayed.
8. Close the Results window and Close the Environments and Data Sources screen.
9. To open the new environment, click **Your Company Production** at the bottom of the main screen.