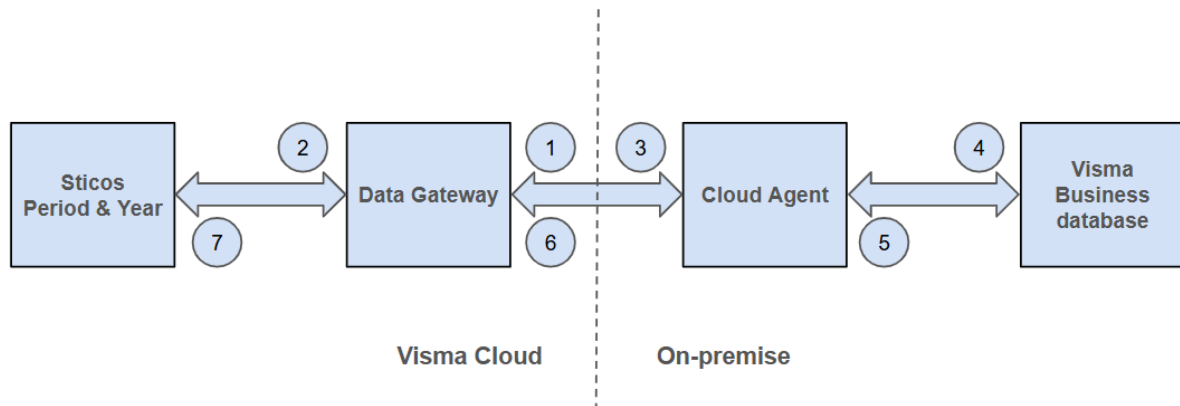


# Visma Cloud Agent

Visma Cloud Agent enables Sticos Period & Year to retrieve data from Visma Business databases. It is an application that is installed on a server in the local domain.

## How the agent works



1. The cloud agent connects to the data gateway and starts listening for requests.
2. A user configures and starts an import from Sticos Period & Year using a pairing key from the cloud agent.
3. The data gateway finds the established connection with the customer's agent and passes on the request.
4. The agent looks up the credentials and settings for the requested data source and executes the request.
5. The agent gets the result data from Visme Business.
6. The agent starts streaming back the result to the data gateway.
7. The data gateway passes the stream on to Sticos Period & Year.

## Storing SQL Server credentials

When you add a data source to the agent, you need to provide credentials for that database server. All queries to the database will be using these credentials. The credentials are encrypted securely, using asymmetric encryption so that they cannot be decrypted by a third party.

All credentials are stored locally on the agent machine and never communicated outside the agent.

## Ports

The agent creates an outbound connection to the gateway server. It communicates on outbound port 443. The agent does not require any inbound connections.

# Installing the agent

The agent is installed by installing the following file: *PeriodYear.Gateway.Agent.Installer.msi*

Run the installer.

1. Select the file path where you want to install the agent. Note that the closer the Cloud Agent is to the database server, the faster the connection will be. It is recommended on a machine that can be left running all the time.
2. Click **Install**.

The **Visma Cloud Agent Administration** screen opens in your browser (<http://localhost:5110>).

## Adding a data source

1. In **Visma Cloud Agent Administration**, click **Add data source**.

**NOTE:** If you are using a proxy server, click the **Settings** button to access the proxy server settings.

**NOTE:** You can access the **Visma Cloud Agent Administration** any time to add or modify data source, from <http://localhost:5110>.

2. In the **Server name** field, enter the name of the SQL Server.
3. In the **Database** field, enter the name of the Visma Business system database, typically *vbsys*.
4. Under **Authentication**, select **SQL Server Authentication** or **Windows Authentication**. If you select SQL Server Authentication, you must specify **Login** name and **Password**.

**NOTE:** The account specified must have read access to the Visma Business system database and all Visma Business client databases you want to access.

**NOTE:** If you use Windows authentication, the account running the Cloud Agent service must have access to the databases on the SQL server. The Visma Cloud Agent service is by default set up to run with a local system account. However, this can be changed to another account.

5. **File Access** is not used at the moment.
6. In the **Name** field, enter a name for this data source.
7. Click **Save**.

You will now receive a pairing key. Copy this key and use it when you configure the import in Sticos Period & Year.