Sage Master Builder
Installation and
License Administration Guide

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Chapter 1

Welcome to Sage Master Builder Installation

This chapter provides information about the following:

Installation Overview

Customer Support Resources

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Installation Overview

Welcome to Sage Master Builder installation

Welcome to Sage Master Builder installation. Sage Master Builder can run in many different software and network environments. Because of that, there are issues that you need to take into consideration for each one. The more information you can gain about the installation process and how it relates to your software and network environment, the more likely your installation will proceed smoothly.

To gain an understanding of what's new about product installation:

• Review the information in this book

• Review the latest the *QuickStart Installation Guide*

• Read the letter from your business partner.

• Learn about the licensing process. Your Sage Master Builder license is managed by a the License Administration Tool and the Sage license server.

What information is in this book?

The rest of Chapter 1 "Welcome to Sage Master Builder Installation" provides more information about customer resources, such as:

• Other printed and printable guides

• The user-assistance Help system

• Contacts for Customer Support

• Sage Master Builder training

• Information about business partners.

Chapter 2, "System Requirements and Configuration" presents technical information about:

• System requirements for servers and client workstations

• Supported operating systems

• Special configurations for specific operating systems

> Sage Master Builder will not run correctly or not run at all on computers that do not meet the requirements, so before you install the software, be sure your computers meet the system requirements.

Chapter 3, "Sage Master Builder Installation," provides detailed information and instructions for installing Sage Master Builder software in different environments, such as:

- Single user

- Peer-to-peer

- Network

Chapter 4, "Managing Your License with the License Administration Tool," provides detailed information about:

- Setting the administrator password

- Managing and activating your license

- Creating group reservations

- Using the License Administration Tool.

Chapter 5, "License Use and Sage Master Builder," provides all the necessary details about:

- Specifying the Sage license server

- Managing license attributes

- Understanding license uses

- Running Sage Master Builder in a "connected" state

Chapter 6, "Special Configurations" contains information about special configurations for specific operating systems, such as

- Windows® 7 Professional and Windows Server 2008® R2 Standard

- Windows Vista® and Windows Server 2008

- Windows Server 2003®

- Windows XP® Professional

- Citrix® and Terminal Servers

Customer Support Resources

About customer support resources

Sage Master Builder offers a variety of customer support resources.

Sage Knowledgebase

You can access the Technical Support Knowledgebase 24 hours-a-day, seven days-a-week for solutions to frequently asked questions. You can also find software alerts and notices, release guides, and year-end close information there too.

> **Tip:**
>
> This is the same online tool our support staff uses when responding to calls from service plan customers.

To access the Technical Support Knowledgebase:

1. Click https://customers.sagenorthamerica.com/irj/portal/anonymous/login.

2. On the Welcome page, in the left column, click **Knowledgebase Search** to open a list of products.

3. Complete **Step 1** by selecting Sage Master Builder from the list of products.

4. Complete **Step 2** by entering a search term in the box.

5. Click **Search**.

The search results appear below the box.

Release Updates

To get the latest information about this release, log on to the Customer Portal,
https://customers.sagenorthamerica.com/irj/portal/anonymous/login
 Then click **Support** > **Documents** > **For Customers** > **Sage Master Builder** > **Release Materials**.

Online Support

If you would like assistance with a solution and your service plan provides online technical support:

1. Log on to:
   https://customers.sagenorthamerica.com/irj/portal/anonymous/login

2. Then click **Self Service** > **My Requests** > **Customer Support Ticket**.
   This sends your request directly to Customer Support.

Phone Support

If you need help and your Service Plan provides support assistance, call Customer Support at 800-866-8049. Support hours are Monday through Friday from 6 a.m. to 5 p.m. PT (Pacific Time).

Remote Assist Tool

The Remote Assist Tool allows Sage Customer Support representatives to access your systems and data remotely through your computer to provide support services to you and your company. You can access the Remote Assist Tool from a Help menu link on the Sage Master Builder main page. Point to **Help > Customer Resources > Technical Support > Remote Assist Tool**.

Customer Forums

Exchange information with other Sage Master Builder customers. Log on to:
https://customers.sagenorthamerica.com/irj/portal/anonymous/login
On the Web page **Home** tab, find and click **Forums**.

Upgrade Your Service Plan

If your service plan does not provide online technical support, you may add or upgrade a service plan by calling 800-858-7098 or by logging on to:
https://customers.sagenorthamerica.com/irj/portal/anonymous/login
Then click **Self Service** > **My Requests** > **Customer Service Request**.

Training Resources

About training options

Learning to use Sage Master Builder software has never been easier! Whether you choose to take online classes from Sage, participate in classroom training, or work directly with your business partner, you will learn how to use Sage Master Builder to support your business. Contact your business partner to find out about training options or visit www.sageu.com/masterbuilder.

Overview of customer classes

Online classes help make learning Sage Master Builder convenient. Each instructor has years of experience using Sage Master Builder and will lead you step-by-step through the class material.

Online classes allow you to view the instructor's computer screen as he or she demonstrates Sage Master Builder software. Once you register for your class via Sage University, you will receive email communications that tell you how to access the training. Because the classes are live, you can ask questions and benefit from hearing other students' questions. Classes cover all aspects of Sage Master Builder, including project management, estimating, scheduling, and payroll. For more information, visit www.sageu.com/masterbuilder.

Getting started with training

All customers should begin with our New Customer Training (NCT) series which is included in our Essentials Training Package in recorded format for 24/7 access. These classes include an overview of the Sage Master Builder system and its features. Customers that prefer live online training can register for the Realtime Learning version of these NCT courses. For more information, visit www.sageu.com/masterbuilder.

Business Partners

About Business Partners

To serve you better, Sage Master Builder products and services are available to you through an authorized network of business partners.

Your business partner is available to serve you, from simple how-to questions and hands-on demonstrations, to installation, implementation, and training. They're fully equipped to help you get where you want to be. For more information please contact your Sage Master Builder business partner.

Business Forms

Sage Construction and Real Estate Forms

Sage Master Builder is designed to work with generic checks and forms that are available from many sources. There is no single vendor that customers must use; however, you can get a complete portfolio of forms, tax forms, and checks through *Sage Construction and Real Estate Forms* by calling 800-760-7929 or by visiting www.timberlineofficeforms.biz

Chapter 2

System Requirements and Configuration

This chapter provides information about the following:

Hardware Requirements

About system requirements and configuration

It is very important to verify that your computers and server meet the system requirements for installing and running Sage Master Builder. We strongly recommend that you read through these system requirements before you begin installing any Sage Master Builder software.

About the Sage System Verifier

The Sage System Verifier utility assists with troubleshooting hardware issues related to the Sage licensing component. To locate the Sage System Verifier: **Start** > **All Programs** > **Sage** > **Sage System Verifier**.

Server hardware specifications

We cannot recommend server hardware specifications for your network as this depends on your specific requirements, such as the number of users on your network or other programs that might use server resources, including firewalls, software applications, mail systems, and so forth. We can, however, recommend a set of minimum hardware requirements.

<u>Caution!</u>
We strongly recommend that an uninterruptible power system (UPS) be connected to the computer (workstation or server) in case of a power disruption in which you might lose data. The specifications for your UPS must be determined by your needs and level of risk.

Server hardware requirements

The following table shows the hardware requirements for server computers running Sage Master Builder.

Caution!

The minimum processor requirements for servers listed in the table below are based on the Microsoft® Windows® Server 2003® operating system family. When updating or purchasing servers running newer operating systems such as Windows Server 2008®, Small Business Server® 2008, and Server 2008 R2 Standard, we recommended that you also refer to Microsoft system requirements.

Hardware	Minimum	Recommended
Processor	Intel® Pentium® 4 or comparable	Intel® Dual Core/Quad Core™ or comparable, 2 GHz+
RAM	2 GB	4 GB+
Free Disk Space	3.5 GB	3.5 GB+
CD-ROM Drive	2X CD-ROM	24X CD-ROM+, DVD-ROM, or DVD RW
Printers	For highest quality printing, we recommend laser or ink-jet printers.	

Important:

These minimum recommendations include the 370 MB of hard disk drive space required for running Microsoft .NET Framework 3.5 Service Pack 1 software on servers.

Related topics...

Minimum requirements for the .NET Framework on servers

Minimum requirements for the .NET Framework on clients

Client and workstation hardware

Client and workstation hardware requirements

The following table shows the hardware requirements for client and workstation computers running Sage Master Builder.

Hardware	Minimum	Recommended
Processor (except Vista®/ Windows 7)	Pentium 4 or comparable	Intel Dual Core or comparable
Vista/Windows 7 processor	1 GHz	2 GHz+
RAM (except Vista/Windows 7)	1GB	2 GB+
Vista workstation RAM	2 GB	4 GB+
Free Disk Space	1 GB	3 GB+
CD-ROM Drive	2X CD-ROM	2X CD-ROM+
Printers	For highest quality printing, we recommend laser or ink-jet printers.	

Note:

- These minimum recommendations include the 230 MB required for running Microsoft .NET Framework 3.5 Service Pack 1 software. on client workstations.
- The recommended free disk space is based on the installation of a single program and the average size of a Sage Master Builder company database. Allow at least 50 MB for each additional company database that you create.

Related topics...

Minimum requirements for the .NET Framework on servers

Minimum requirements for the .NET Framework on clients

Server hardware requirements

Operating System Requirements

Operating systems

We recommend that the following information be taken into account for a smooth and successful installation experience.

Supported Operating Systems

Server, 32 and 64-bit Operating Systems	Client/Workstation, 32 and 64-bit Operating Systems
Microsoft Windows Server 2008 R2 Standard	Microsoft Windows 7 Professional
Microsoft Small Business Server 2008	Microsoft Windows Vista Business
Microsoft Windows Server 2008	Microsoft Windows XP® Professional (SP 2 or newer)
Microsoft Windows Server 2003	
Microsoft Windows Small Business Server 2003® (SP 1 or newer)	

Unsupported Operating Systems

Caution!

Sage Master Builder and/or its components do not run on or do not support some operating systems. Do not install Sage Master Builder to computers running these Microsoft Windows operating systems:

- Microsoft Windows 95®
- Microsoft Windows 98®
- Microsoft Windows NT® Server
- Microsoft Windows NT Workstation
- Microsoft Windows 2000®
- Microsoft Windows 2000 Server®
- Microsoft Windows XP Home ®
- Microsoft Windows Vista Home Basic
- Microsoft Windows Vista Home Premium
- Microsoft Windows 7 Home

Important:

- Microsoft .NET Framework 3.5 Service Pack 1 must be installed to all computers running Sage Master Builder and the License Administration Tool.
- During installation, Microsoft .NET Framework 3.5 Service Pack 1 is installed on your computer automatically if it is not already installed.
- Be sure that all server and client computers meet both .NET Framework requirements and Sage Master Builder requirements.

Note:

When you have a network with three or more users, a dedicated file server increases performance and reliability.

Web browser requirements

Web browser requirements and recommendations are:

Minimum	Recommended
Microsoft Internet Explorer$^®$ 6.0, Service Pack 1 or later (except Vista/Server 2008, Windows 7)	Microsoft Internet Explorer 6.0, Service Pack 1 or later (except Vista/Server 2008, Windows 7)
(Vista Business/Windows 7 and Server 2008 operating systems) Microsoft Internet Explorer$^®$ 7.0 or later.	(Vista Business/Windows 7 and Server 2008 operating systems) Microsoft Internet Explorer 7.0 or later.

Network Configuration Requirements

Server network configuration requirements

The following table shows the server network configuration requirements for server computers running Sage Master Builder.

Note:

- Sage Master Builder typically runs in a local area network (LAN) environment.
- Sage Master Builder runs in a wide area network (WAN) using Citrix or Terminal Services. Contact your business partner for more information.

Process	Required
Network Protocol	TCP/IP
Minimum Network Speed - LAN	10/100/1000 Mbps
Minimum Network Speed - WAN	+/- 1.5 Mbps receiving data (downstream) +/- 384 Kbps sending data (upstream)

Client and workstation network configuration requirements

The following table shows the server network configuration requirements for client and workstation computers running Sage Master Builder.

Note:

For information about running Sage Master Builder in a wide area network (WAN) using Citrix and Terminal Services, contact your business partner.

Process	Required
Network Protocol	TCP/IP
Minimum Network Speed - LAN	10/100/1000 Mbps
Minimum Network Speed - WAN	128 Kbps Broadband

About network configuration and TCP Remoting Channel

Sage Master Builder uses the TCP Remoting Channel, a Microsoft .NET Framework component to enable communication among computers on a network. Certain configurations can potentially disable the communication:

- File sharing on computers running the Vista, Server 2008, or Windows 7 operating systems must be enabled. To enable file sharing, follow the instructions in the Vista, Server 2008, or Windows 7 Help.

- TCP communication requires the selection of port numbers that are not in use by other processes on the local computer.

- Software firewalls running on the local computer can be configured to block processes from opening TCP ports, which will prevent communication through the TCP Remoting Channel.

Configuring Sage Service Host TCP port numbers

By default, the Sage Serve Host uses the TCP port numbers 8103 and 8104. These numbers can be configured using an XML file, `Sage.SMB.xml`, located under:
`\Documents and Settings\All Users\Application Data\Sage\LS1\ServiceHost\1.1\Configuration`.

Caution!
If you need to change the default port numbers for the Sage Service Host using the `Sage.SMB.xml` file, you must change it on every computer on the network where Sage Master Builder is installed. In addition, after making this change, the Sage Service Host on each computer running Sage Master Builder must be restarted.

Note:
Consult with your IT administrator for alternative port numbers.

To change the port numbers:

1. In Window Explorer, locate the `Sage.SMB.xml` under this path: `\Documents and Settings\All Users\Application Data\Sage\LS1\ServiceHost\1.1\Configuration`.

2. Right-click Sage.SMB.xml, and open it with a text editor, such as Notepad.

3. Near the end of the file between the `<Remoting> </Remoting>` tags, locate the port numbers and change them.

4. Save and close the file.

5. Repeat steps 1-4 on every computer running Sage Master Builder.

Configuring third-party firewalls

During installation of the Sage Service Host, the Windows Firewall is configured automatically to allow the Sage Service Host to act as a TCP server. If you use some other firewall, however, you may need to manually adjust some settings in the firewall in order to ensure proper operation.

Note:

You can use the following basic procedure to manually configure the Windows Firewall to allow the Sage Service Host to communicate with other computers. Use it as the basis for manually configuring other third-party firewall products.

To configure the Windows Firewall:

1. **Click Start > Control Panel > Security Center** (XP) or **Security** (Vista).

2. Open **Windows Firewall**, and select the **Exceptions** tab.

3. If Sage Service Host is not on the list, then you can add it by selecting **Add Program**, then browsing to the following path:
   `\Program Files\Common\Files\Sage\LS1`
   `\ServiceHost\1.1\Sage.LS1.ServiceHost.exe.`

   Note:

   By default, the exception is set to allow access by any computer on the network. If desired, you can refine this setting by selecting the **Change Scope** button. Be aware that restricting the scope incorrectly can cause the computer to be unable to connect with some or all of the other machines on the network.

Microsoft .NET Framework 3.5 Service Pack 1 Requirements

About installation and Microsoft .NET Framework

When you install Sage Master Builder software, you will also install the Microsoft .NET Framework 3.5 Service Pack 1, if it is not already

installed. It is important that you make sure that both your client and server computers meet the minimum requirements for installing both Sage Master Builder software and the .NET Framework 3.5 Service Pack 1.

Important:

If the Sage Master Builder installation requires an installation of Microsoft .NET Framework 3.5 Service Pack 1, the Sage Master Builder installation process may continue automatically after the .NET Framework installation is completed. If you are prompted to restart your computer after the .NET Framework installation, however, you must do it to continue the Sage Master Builder installation.

About installing .NET Framework 3.5 Service Pack 1 and Operating Systems

Note:

If Microsoft .NET Framework 3.5 Service Pack 1 is not already installed on your computers, then that installation alone may take up to 20 minutes per computer.

The following are the supported operating systems for .NET Framework 3.5 Service Pack 1:

- Windows 7 Professional
- Windows Server 2008 R2 Standard
- Windows Vista Business

- • Windows Server 2008

- • Windows XP Professional

Viewing and verifying system information

You may use the `Winmsd.exe` to open the **System Information** window to view a list of your system information.

To view and verify system information:

1. Click **Start**, then click **Run**.

   The **Run** dialog box opens.

2. In the **Open** text box, type `winmsd.exe`, and then press the Enter key.

   The **System Information** window opens displaying a list of your system information.

.NET Framework Requirements for Server Computers

Minimum requirements for the .NET Framework 3.5 Service Pack 1 on servers

The following table shows the .NET Framework requirements for computers running Sage Master Builder.

Component	Required
Hard disk space at installation	800 MB
Hard disk space to run	370 MB
Video card	800x600, 256 colors

Related topics...

Server hardware requirements

Client and workstation hardware requirements

Minimum requirements for the .NET Framework on clients

.NET Framework Requirements for Client Computers

Minimum requirements for the .NET Framework 3.5 Service Pack 1 on clients

Component	Required
Hard disk space at installation	160 MB
Hard disk space to run	70 MB
Video card	800x600, 256 colors

Related topics...

Server hardware requirements

Client and workstation hardware requirements

Minimum requirements for the .NET Framework on servers

Verifying that Microsoft Internet Explorer 6.0 Service Pack 1 is installed

You need to have Microsoft Internet Explorer 6.0 Service Pack 1 installed on a client to meet minimum requirements for running Sage Master Builder software. This is also a requirement for installing and running .NET Framework 3.5 Service Pack 1.

To verify that Microsoft Internet Explorer 6.0 Service Pack 1 is installed:

1. Launch Internet Explorer.

2. On the Internet Explorer **Help** menu, click **About**.

3. In the **About Internet Explorer** dialog box, verify that the version number is 6.0 Service Pack 1 or newer, and then click **OK**.

Note:

To download Service Pack 1 for of Microsoft Internet Explorer 6.0, visit the following Microsoft Web site: http://www.microsoft.com/windows/ie/ie6/downloads/critical/ie6sp1/default.mspx

Report Scheduling and Faxing Functionality

About setting up emailing and faxing through Sage Master Builder

Important information regarding Report Scheduling and Faxing Functionality

Using the faxing functionality through the Sage Master Builder program requires a separate installation and setup procedure for a fax modem in your workstation and access to an analog phone line. You may also have to set up the cover page information and the number of times that the fax re-tries to send.

For more information about installing and setting up your fax modem, refer to the documentation that came with your fax modem. Sage Master Builder does not provide support for installing or setting up a fax modem.

Faxing Functionality and Operating Systems

Faxing functionality through Sage Master Builder only works with Windows XP Professional, Windows Server 2003, Vista Business, Windows 7 Professional operating systems, and Windows Server 2008. Faxing functionality requires that Adobe Reader 8.1.3 or higher is installed on the computer doing the faxing.

Upgrade to Adobe Reader version 8.1.3

Adobe Reader Version 8.1.3 supports faxing from Windows. To fax from Sage Master Builder, you should download and install 8.1.3 or higher.

Important: Customers have reported problems faxing from Sage Master Builder with versions earlier than 8.1.3. This version is available from http://get.adobe.com/reader

Disengage automatic updating for Adobe Reader

If you are using the scheduling capability for sending faxes, we recommend that you disengage the automatic "check for updates" capability of Acrobat Reader as it will prevent scheduled reports from completing.

Note:

Instructions disengaging automatic "check for updates" differ from version to version of Adobe Reader. Refer to the Adobe Reader Help for instructions.

Report Scheduling and Email Functionality

Important:

Using the email capability of Sage Master Builder requires access to a simple mail transfer protocol (SMTP) email server. This server may be located on your workstation PC, on a server on your company's network, or at your Internet service provider (ISP). If the email server is local, you may need the assistance of an IT professional to properly identify or set up this capability. If the email server is located at your ISP, you may need contact your ISP for assistance.

Using the ISP's simple mail transfer protocol (SMTP) server to send email via Sage Master Builder typically requires "user authentication" at the STMP server. An example of an SMTP email server name is "`smtp.att.sbcglobal.net`."

Different ISPs may use different terms when referring to user authentication. In general, however, user authentication means verifying a user's identity by means of a "user name" and "password."

In the context of sending email through Sage Master Builder using an ISP's SMTP server, user authentication only refers to verifying the user's identity at the ISP's SMTP server. It does not refer to your:

- Sage Master Builder user name and password
- Network domain user name and password
- Windows system user name and password.

Note:

- We do not provide support for setting up or installing an email server.
- You set up user authentication and your fax line access dial-out number on **7-2 Company Information**. For more information, see the Help topic, "Entering company information."

Installing the Windows Fax Services component

To fax from Sage Master Builder, you have to install the Windows Fax Services component.

To install the Windows Fax Services component (XP):

1. Open the Window **Control Panel**.

2. On the **Control Panel** window, double-click **Add or Remove Programs**.

3. On the **Add or Remove Programs** window in the left column, click the **Add/Remove Windows Components** icon.

4. On the **Windows Components Wizard** window, select the **Fax Services** check box, and clear all the other check boxes.

5. Click **Next**, and follow the instructions on the screen.

To install the Windows Fax Services component (Vista):

1. Click **Start > Control Panel** > **Programs** > **Turn Windows features on or off**.

2. On the **Windows Features** window, locate the **Windows fax and scan** check box, then select it.

3. Click **OK**.

Sage Master Builder API

System requirements for Sage Master Builder API

If you are using the Sage Master Builder API, the minimum and recommended system requirements may vary. These requirements must be considered in addition to the recommended system requirements for running Sage Master Builder.

It may be necessary to increase the processor speed, memory, and/or disk space of your system depending upon the requirements of the third-party application using the API. Please consult with your third-party vendor to determine what changes, if any, should be made to your hardware configuration in order to meet your desired performance criteria.

Chapter 3

Sage Master Builder Installation

This chapter provides information about the following:

Installation Preview

New Installations

Upgrade Installations

Installation Preview

Pre-installation information for new customers

Implementing and running your business in Sage Master Builder must be thoroughly planned out in advance to harness the tremendous power of this software. Your existing company data must be migrated before you start working in the program. Your business partner can assist you with a data migration and business implementation plan. For more information about implementing Sage Master Builder for your company, see the information about business partners in Chapter 1 of this guide.

We recommend that you take full advantage of all the knowledge and advice found in Sage Master Builder documentation and training classes. We also recommend that you work with your business partner and accounting professionals before you begin to implement this software for your business.

We strongly recommend that you install the Sage license server on a computer that is always available to other computers on your network that are running Sage Master Builder.

Pre-installation information for existing customers

Because existing customers are working with company information and possibly with scheduled reports, please review these important points before you start to install the program.

Important:

- When you reinstall or upgrade, turn off scheduled reports. Reports must not be printed, faxed, or emailed at the same time that you reinstall or upgrade the program.
- Do not upgrade or reinstall Sage Master Builder while the Sage Master Builder program or the API is running.
- Before you install, make at least one backup copy, but consider making two backup copies of your existing company data for an extra margin of safety. Click here to jump to data backup information.

Duration of the installation process

Plan on at least five and possibly up to 20 minutes per computer to install Sage Master Builder and its companion software, such as the Sample Company and the License Administration Tool. The duration of the Sage Master Builder installation depends a great deal upon each computer's configuration. For example, some newer computers are pre-installed with essential software required to run Sage Master Builder software such as the .NET Framework 3.5 Service Pack 1 and the Windows Installer 3.1. Installation to older computers may take more time.

Additional required software

Both Windows Installer 3.1 and the Microsoft .NET Framework 3.5 Service Pack 1 must be installed on all computers running Sage Master Builder software. The installer determines if the .NET Framework 3.5 Service Pack 1 and the Windows Installer 3.1 are already installed. If not, the installer installs the required software automatically.

Important:

If you need to install Windows Installer 3.1, then the computer must restart before you continue with the Sage Master Builder installation. After your computer restarts, opening and closing your CD drawer with the installation CD in it should restart the Sage Master Builder installation. If the install program does not start automatically, go to **Start** > **Run** > **Browse**, locate your CD drive and select setup.exe. Then click **OK**.

Plan for an additional 10 to 15 minutes per computer to install .NET Framework 3.5 Service Pack 1 and Windows Installer 3.1 on each computer.

Important:

It is very important that you understand the network environments and operating systems on the computers and server computers where you install Sage Master Builder software. Chapter 6 Special Configurations provides detailed information about installing to different environments.

About installing the Sage Master Builder software to different configurations

You can install Sage Master Builder software to many different configurations, for example, stand-alone, network server, Citrix and Terminal Services servers, peer-to-peer, and workstations.

Important:

- The optimal operational size of a peer-to-peer network running Sage Master Builder is two to five workstations. Additional workstations may adversely impact Sage Master Builder response times. Networks consisting of more than five (5) workstations may need to use one computer as a dedicated server.
- For installation to Citrix and Terminal Servers, see Chapter 6, Special Configurations under the section, Citrix and Terminal Servers."

Sage Master Builder allows users to share data and reports stored on a network hard drive. From different workstations, users can then access the server to share one set of data, one set of reports, and one set of report forms.

During installation, the installer checks for the components necessary to run Sage Master Builder and then copies the program modules and reports to the \MB7 folder and subfolders that are created on the hard disk. In addition, the installation process copies system files necessary for program operations to the Windows and Windows System folders.

The installation process does not make any configuration changes to the computer. After installation is complete, you must configure the stand-alone computer, server computer, or workstation for optimal performance. For example, you need to configure the date format on computers running the Windows Server 2003 operating system. For detailed information about configuring each server and workstation depending on its operating system, see Chapter 6, Special Configurations under the section, Citrix and Terminal Servers."

Related topics...

[Configuring third-party firewalls](#)

[Installing on computers running Citrix and Terminal Servers using DOS commands](#)

Connectivity across your network

For all client workstations running the program to be connected to your company data, they must all be connected to the Sage license sever. If one user sees the "unable to connect" message when all other people are connected, then you know that the connectivity problem is limited to that one person. If you encounter a hardware failure with your server, then all the people running Sage Master Builder will be disconnected.

License Administration Tool

Installing Sage Master Builder also installs the License Administration Tool, a Sage licensing application. You can log on to the tool from any computer on the network see who is using the program in "read-only" mode. In addition, the administrator for the License Administration Tool can log on in "administrator" mode to work with such tasks as activating your license and registering new modules.

Option to update reports and report forms on a shared drive during installation

If you are running Sage Master Builder in a network environment, this option enables you to update shared system reports and report forms located on a network drive during installation. You no longer have to run the installation twice.

When you select this option, the installation process enables a list of network drives that already have an `\MB7` folder.

Important:

This option only updates system reports and report form files. It does not perform a complete installation. If you need to be able to run Sage Master Builder on the targeted server or the server's licensing needs to be updated, you must do a complete installation directly on the server.

Installing the Sample Company

The Sample Company provides the means for viewing and working with sample data in Sage Master Builder windows. There are sample accounts, sample employees, sample takeoffs, and much more. By viewing and working with this sample data, you can gain an understanding of how different windows interact with the sample data when managing a construction business with Sage Master Builder.

Sage Master Builder master trainers use the Sample Company extensively during Sage Master Builder training classes. We highly recommend that you load the Sample Company during your initial installation.

You can log on to the Sample Company using "Supervisor" as the user name. You do not need a password.

The Sample Company:

• Allows you a safe way to try out new functions as you learn them.

• Is used in many on-line and recorded classes.

• Provides samples of many Sage Master Builder forms that are all filled in. This makes it easy to understand many concepts.

• Provides starter lists for many values you'll need to set up: cost codes, cost types, tasks, client status, client type, employee positions, paygroups, etc.

• Provides you with live data to investigate the content of Sage Master Builder reports.

• Takes very little space on your hard disk drive.

Important:

• Installing the Sample Company overwrites any previous installations of the Sample Company.
• If you have made changes in your Sample Company that you wish to keep, rename this folder before installing a fresh copy of the Sample Company.

New Installations

About new installations

A new installation is defined as:

*   Installing the software on a computer that has never had Sage Master Builder installed on it before.

*   Installing the software on a computer where Sage Master Builder and Sage Licensing has been removed using **Control Panel > Add or Remove Programs**.

> **Note:**
>
> Instructions for reinstallation/upgrade installation over an existing installation are different. See Upgrade Pre-installation.

You must designate one computer on your network as the Sage license server. This server will manage use of Sage Master Builder; for example, the number of people who can use Sage Master Builder simultaneously on your network. You will need to install the software on this computer first and then activate your licenses before installing Sage Master Builder on your other computers.

The installation package of files is the same whether it is available to you on a CD or in a folder on a network drive.

There are several way to install the program:

*   You can install Sage Master Builder from the product CD at each computer.

*   You can copy the entire CD (all files and folder) to a folder that you create on a network drive and then install to each client workstation by launching the installation from that network folder from that client workstation.

No matter which installation method you use, we recommend that you install to the Sage license server computer first. Then when you install the program to your workstations, you can set up Sage Master Builder to find the Sage license server and run the program using you license.

The installation process also presents different installation windows depending on whether you are installing the Sage license server and Sage Master Builder or you are just installing Sage Master Builder by itself.

Basic steps for new installations are:

1. First install the program on your network server, the computer where all your company data is located. You do this only once on your network. Remember to write down the Sage license server computer's IP Address and/or computer name, which is displayed at the end of the installation.

2. Next, activate your license.

3. Install the program to all client workstations on your network.

4. From each client workstation, specify the Sage license server.

   Important:

   Always start installing the program at the computer that will be your Sage license server, which is likely to be your network server.

Installing the Sage license server and Sage Master Builder

When you choose the option to install the Sage license server, you also install Sage Master Builder.

Use these instructions when:

• Installing the software on a computer that has never had Sage Master Builder installed on it before.

• Installing the software on a computer where Sage Licensing and Sage Master Builder has been removed using **Control Panel** > **Add or Remove Programs**.

• Also select this option if you are running in a stand-alone environment. Stand-alone means that you are running Sage Master Builder on one computer, or you are not networking with other computers running Sage Master Builder.

Find your installation method below, either CD or network folder, and follow the installation instructions.

To install the Sage license server and Sage Master Builder from a CD:

1. Close all open programs except for firewall and antivirus programs.

2. Insert the Sage Master Builder CD into your CD-ROM drive.

   If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select setup.exe. Then click **OK**. Click here to jump to the rest of the installation instructions.

3. After the installation begins, click here to go to the rest of the instructions.

To install the Sage license server and Sage Master Builder from a CD image in a network folder:

1. Close all open programs except for firewall and antivirus programs.

2. On a network drive, create a folder named, for example, Master Builder 15 CD Image.

3. Copy the entire contents of the CD (all files and folders) to that folder.

4. In the folder that you have created, locate the setup.exe file and double-click it.

5. After the installation begins, click here to go to the rest of the instructions.

Complete the installation using these steps:

1. Read the instructions on the installation welcome window, and click **Next**.

2. On the installation option window, select the option **This computer will be my Sage license server**, and click **Next**.

3. On license agreement window, read the **License Agreement** carefully.

4. Select the check box to accept the terms, then click **Next** to continue the installation.

   The select a drive window appears.

Important:

Sage Master Builder should always be installed to a local drive. You can share Master Builder data that is located on a network drive among client workstations that are running Sage Master Builder locally.

5. Select a local drive location for the installation, and click **Next**.

   In the next installation window, you are presented with either one option or two options:

6. On the select additional options window:

   a. Install the Sample Company for training purposes. We recommend that you install the Sample Company.

   b. Update reports and report forms on a local or network drive. This does not install the entire Sage Master Builder program on the other drive. It only updates the system reports and report forms.

      Note:

      This option may not appear for first-time installations because it is unlikely that a shared \MB7 folder already exists on your network.

The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1 and Windows Installer 3.1 installed. If these programs are not found, the installer installs them. Sage Master Builder Version 15 does not install the .NET Framewor 3.5 Service Pack 1.

Note:

- If you need to install Windows Installer 3.1, then the computer must restart before you continue with the Sage Master Builder installation. After your computer restarts, opening and closing your CD drawer with the installation CD in it should restart the Sage Master Builder installation.

- If the install program does not start automatically, go to **Start** > **Run** > **Browse**. Locate your CD drive or CD image folder, select setup.exe, and then click **OK**.

- If your computer security warns you that Sage Licensing is trying to access the Internet, click **Allow**.

At the end of the installation process, a confirmation window appears containing a list of installed programs. Here is an example.

- **Sage license server software**

- **License Administration Tool**

- **Sage Master Builder**

- **Sample Company**

This window also displays the computer's IP Address and its network name. You will use this information to specify the Sage license server.

7. Review the list of installed programs, and write down the IP Address and network name of the computer.

   Important:

   Write down and keep the Sage license server computer's IP Address and name in a convenient location. To select the Sage license server from client computers running Sage Master Builder, you need to select its name from a list or type the computer's IP Address or name in a text box.

8. Click **Next**.

The activate your product license window appears. The **Launch the License Administration Tool** check box is pre-selected to launch the License Administration Tool so you can activate your license.

9. Read the instructions about activating your product license, and then click **Finish**, leaving the **Launch the License Administration Tool** check box selected.

10. The **Logon Administrator Password** window opens.

11. Set the **Administrator** password.

    For information about this process, click the **Help** button on the **Logon Administrator Password** window.

    For details about managing your license, see Chapter 4, Managing Your License with the License Administration Tool.

Installing Sage Master Builder on client workstations

Find your installation method below, either CD or network folder, and follow the installation instructions.

To install Sage Master Builder only from a CD:

1. Close all open programs except for firewall and antivirus programs.

2. Insert the Sage Master Builder CD into your CD-ROM drive.

    If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select `setup.exe`. Then click **OK**. Click here to jump to the rest of the installation instructions.

3. After the installation begins, click here to go to the rest of the instructions.

To install Sage Master Builder only from a CD image in a network folder:

1. Close all open programs except for firewall and antivirus programs.

2. On a network drive, create a folder named, for example, `Master Builder 15 CD Image`.

3. Copy the entire contents of the CD (all files and folders) to that folder.

4. In the folder that you have created, locate the `setup.exe` file and double-click it.

5. [After the installation begins, click here to go to the rest of the instructions](#).

To complete the installation of Sage Master Builder:

1. Read the instructions on the installation welcome window, and click **Next**.

2. On the installation option window, select the option **This computer will run Sage Master Builder only**, and click **Next**.

3. On the license agreement window, read the **License Agreement** carefully.

4. Select the check box to accept the terms, then click **Next** to continue the installation.

   The select a drive window appears.

5. Select a local drive location for the installation, and click **Next**.

   The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1 and Windows Installer 3.1 installed. If these programs are not found, the installer installs them.

6. On the select additional options window:

   a. Install the Sample Company for training purposes. We recommend that you install the Sample Company.

   b. Update reports and report forms on a local or network drive. This does not install the entire Sage Master Builder program on the other drive. It only updates the system reports and report forms.

      Note:

      This option may not appear for first-time installations because it is unlikely that a shared \MB7 folder already exists on your network.

   The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1 and Windows Installer 3.1 installed. If these programs are not found, the installer installs them. Sage Master Builder Version 15 does not install the .NET Framewor 3.5 Service Pack 1.

Note:

- If you need to install Windows Installer 3.1, then the computer must restart before you continue with the Sage Master Builder installation. After your computer restarts, opening and closing your CD drawer with the installation CD in it should restart the Sage Master Builder installation.

- If the install program does not start automatically, go to **Start** > **Run** > **Browse**. Locate your CD drive or CD image folder, select setup.exe, and then click **OK**.

- If your computer security warns you that Sage Licensing is trying to access the Internet, click **Allow**.

An installation complete window appears. The **Launch Sage Master Builder** check box is preselected so that you can launch Sage Master Builder and specify the Sage license server.

7. Read the important message and follow the instructions to launch Sage Master Builder.

8. Click **Finish**.

Master Builder begins its launch process by displaying the **Specify Sage License Server** window.

For more information about this process, you can click the **Help** button on the **Specify Sage License Server**, or see Chapter 5 License Use and Sage Master Builder.

Related topics...

About upgrading Sage Master Builder

Upgrade Installations

About upgrading Sage Master Builder

If you currently have Sage Master Builder installed on your network computers and you are going to reinstall it, you could be either upgrading or updating the software.

Upgrade installations involve major changes, enhancements, and fixes to many parts of the program or to modules such as licensing. For example, installing Version 15 over Version 14 is an upgrade installation because there are major enhancements to the program.

Update installations, in contrast, usually involve changes to specific files, such as the `Sage.SMB.PayrollTax.dll` file and report forms. These files can be changed and updated without any changes to major parts of the program.

In addition, upgrade installations are different from a new installations.

• During a new installation (or reinstallation after completely removing Sage Master Builder and Sage licensing), you can designate a computer to be either the Sage license server or a client work station.

• During an upgrade installation, the installer checks to see if Sage licensing exists on that computer. If the installer detects a previous installation, the installer follows the prior installation path for that computer. You do not see the option to select a designation. If a computer had previously been the Sage license server, it will be reinstalled/upgraded again as the Sage license server.

Note:

If you want to change a computer's designation as either a Sage license server or a client workstation, you need to uninstall the Sage licensing and the Sage Master Builder program using **Control Panel** > **Add or Remove Programs**. How?

Upgrade Pre-installation

Upgrade pre-installation tasks

Upgrading your Sage Master Builder software requires that you complete preliminary tasks to ensure the safety of your company data.

When upgrading, it is important that you choose a block of time when you can install the upgrade to all the computers in your office beginning with your Sage license server computer. Depending on your computer's hardware and your network configuration, plan on 15 minutes per

computer for the installation process alone. Additional tasks may take extra time.

The following are steps to take before upgrading Sage Master Builder:

1. **Make two backups of your company data -** We suggest making two backups in case one of them is incomplete, becomes corrupted, or is lost. Click here to jump to data backup information.

2. **Make sure that no reports are scheduled to run during installation** - Plan your upgrade installation during the time when no reports are scheduled to be printed, faxed, or emailed. For instructions, open the Sage Master Builder Help and search using the Help search shortcut term "schedulereports." More topics about scheduling reports are located at the end of the topic "About report scheduling."

3. **Exit Sage Master Builder and all other programs -** You must not install the Sage Master Builder upgrade when either Sage Master Builder or the Sage Master Builder API are running. We recommend that you shut down all other programs when installing Sage Master Builder, but you do not have to shut down firewall and antivirus software.

4. **Locate the computer on your network that is your Sage license server**, and begin the upgrade installation there.

Related topics...

About upgrading Sage Master Builder

Upgrade Installation

About installing the upgrade

Always begin all installations at the computer that is the Sage license server. After installing the upgrade to the Sage license server, install the upgrade to your workstations from the image placed in a folder on the network.

Sage Master Builder running on client workstations needs to connect to the Sage license server to access your company data. If you do not change the designation of any computers on your network during an

upgrade installation, all client workstations will be able to locate the existing Sage license server again after installation.

In addition to installing the Sample Company, you may have the option to update system reports and report forms on a local or network drive. For example, let's suppose that your system reports and report forms are located on a shared drive M under an existing \MB7 folder. Now during Sage Master Builder installation to drive C on your local computer, you can also update system reports and report forms to shared drive M.

This option is only available if an \MB7 folder already exists on a different local or network drive. Updating system reports and report forms on different drive does not install the Sage Master Builder program. For example, if you want to install Sage Master Builder to a network drive, you have to go to that computer and install the program from there.

Note:

You only need to update your system reports and report form once on the shared drive from one computer on your network.

Installing the upgrade

When installing, use the same upgrade installation steps for both your Sage license server and your workstation computers.

Important:

Install the upgrade to the existing Sage license server computer first. Install the upgrade to all workstations only after the license server installation has been completed.

To install the upgrade from a download package unzipped into a local or shared folder:

1. Shut down Sage Master Builder and all open programs except for firewall and antivirus programs.

2. Browse to the drive and folder where you extracted the upgrade files in the steps above.

3. Before you proceed further with installation, we recommend that you double-click ReleaseNotesv15.pdf to open it in your PDF viewer. It's

a good idea to review the *Release Notes* for information about "Enhancements," "Fixes," and "Known issues and Comments" that might apply to your network configuration and/or operating systems and affect your upgrade installation.

4. Double-click `Setup.exe` to begin the installation.

   • If you are running the Windows XP operating system and you get a message advising you that the program publisher cannot be identified, click **[Run]**.

   • If you are running the Windows Vista operating system and you get a message advising you that an unidentified program wants to access your computer, click **[Allow]**.

   • If you are running the Windows 7 or Server 2008 R2 operating system and you get a message asking if you want to allow the following program to make changes to this computer, click **[Yes]**.

5. After the installation begins, follow the rest of the instructions below.

To complete the upgrade installation:

1. On the welcome window, notice that a previous installation has been found, and click **Next**.

2. On license agreement window, read the license agreement carefully.

3. Select the check box to accept the terms, and then click **Next**.

4. On the select a drive window, select the local drive where Sage Master Builder is currently installed.

5. On the select additional options window:

   a. The installation process automatically selects the option to install the Sample Company. We recommend that you install the Sample Company, which is used extensively in Sage Master Builder training classes.

Important:

- The upgrade installation overwrites the existing Sample Company. If you want to save changes to the existing Sample Company, clear the check box. If you do not overwrite the Sample Company, you must rebuild the indexes in the Sample Company database using **7-4 Rebuild Indexes** after the upgrade installation.
- If you have made changes in your Sample Company that you wish to keep, rename this folder before installing a fresh copy of the Sample Company.

b. (If available) Update reports and report forms on a local or network drive. This does not install the entire program to the other drive; it only updates the system reports and report forms. This only needs to be done from one workstation.

6. Click **Next**. The installation proceeds.

7. On the **Installation complete** window, click **Finish** to launch Sage Master Builder.

8. Repeat steps to upgrade all other computers running Sage Master Builder.

Note:

On PCs running the Vista operating system, if you receive a **Windows Program Compatibility Assistant** message after completing the installation advising you that the program may not have installed correctly, click the option, **This program installed correctly**.

9. Follow the instructions for post-installation tasks to rebuild the indexes your company database from one computer and reschedule your reports, as necessary.

Resetting the Sage license server computer

In certain instances, you may encounter a Sage license server identification issue. After installing the upgrade, Sage Master Builder should automatically identify the same license server computer as it did before the upgrade.

Important:

When launching Sage Master Builder on a workstation and you
see the message, "Unable to find license server," you can reset
the license server computer with a few steps.

To reset the license server computer:

1. On a different computer running Sage Master Builder connected to
    the Sage license server, launch Sage Master Builder, and then click
    File > **Change Sage License Server**.

2. On the **Change Sage License Server** window, look at the first line,
    and write down the Sage license server IP address. An IP Address is
    a series of numbers that identifies the computer on a network, for
    example, 10.227.16.40.

3. Go back to the computer that cannot find the Sage license server,
    launch Sage Master Builder, and then click **File** > **Change Sage
    License Server**.

4. On the **Change Sage License Server** window, select the second
    option, **Enter the IP Address or name of the computer**, and follow
    the instructions on the window.

If you need more information, refer to the Help topic, "Changing the
Sage license server." Find it quickly by search the Help with the Help
search shortcut term, "changelicenseserver."

Upgrade Post-installation

Upgrade post-installation tasks

Once you have completed your upgrade installation, perform the
following tasks before you open your company and begin work in Sage
Master Builder.

1. **Launch your company and rebuild indexes -** Before you can work
    in the Sage Master Builder company data, you have to rebuild the
    indexes of each company in which you do work. This process
    upgrades the company databases to the new version.

    For instructions, open the Sage Master Builder Help and search
    using the Help search shortcut term "indexdatabase."

Important:

You only have to rebuild the indexes for each company's database one time from one computer using **7-4 Rebuild Indexes**.

2. **Reschedule your reports -** If you had to delete scheduled reports that would have interfered with the upgrade installation, return to the report scheduling window and reschedule your reports.

   For instructions, open the Sage Master Builder Help and search using the Help search shortcut term "schedulereports." More topics about scheduling reports are located at the end of the topic "About report scheduling."

Related topics...

About upgrading Sage Master Builder

Change Sage License Server Designation

About reinstalling to change the Sage License Server designation

If you want to change a computer designation from client workstation to Sage license server or vice versa, you must first uninstall the Sage License. Use **Control Panel > Add or Remove Programs** to uninstall the Sage License, then reinstall the Sage Master Builder program. This approach produces the equivalent of a new installation.

If you reinstall Sage Master Builder over an existing installation, the installation process reinstalls the program to the designation selected in the initial installation. Therefore, after reinstallation, a Sage license server computer remains a Sage license server and a client workstation remains a client workstation.

Note:

Simply reinstalling Sage Master Builder on a computer that is the Sage license server does not affect your license settings or reinstall the License Administration Tool.

To change a computer designation by reinstalling (changing a workstation computer into the Sage license server or the Sage license server into a workstation):

1. Uninstall Sage Licensing from the **Control Panel** > **Add or Remove Programs**.

2. Reinstall Sage Master Builder following the instructions for new installations.

The procedures for new installations are in the Sage Master Builder Installation and License Administration Guide (Version 15). This book is available as a PDF file on the product CD. Information about new installations is in chapter 3, "Sage Master Builder Installation," in the subsection, "New Installations."

Add a New Server

Adding a new server to your network

You bought a new server to add to your network. You want to reinstall your old server as a client workstation.

To add a new server to your network:

1. First uninstall Sage Licensing and Sage Master Builder from your current server using **Control Panel > Add or Remove Programs**.

2. Then install Sage Master Builder to the new server with the designation as Sage license server. Don't forget to write down the Sage license server computer's IP Address and computer name. Click here to jump to the instructions for new installations.

3. Activate your license and perform other Sage license server tasks.

4. Go to each client workstation, and specify the new Sage license server. Make sure that each client workstation can find and connect to the Sage license server.

5. Install Sage Master Builder on the computer that was the old server and specify the new Sage license server. Make sure that the client workstation can find and connect to the Sage license server.

Chapter 4

Managing Your License with the License Administration Tool

This chapter provides information about the following:

License Administration Tool

About the License Administration Tool for Sage Master Builder

When you purchase Sage Master Builder software, it includes the License Administration Tool. Using the License Administration Tool, you can import license files, activate licenses, reserve the use of products and features, and monitor the use of products and features. This tool also supports site licenses and floating use licenses. During software installation, the License Administration Tool is automatically installed on the computer that the software installer designates as the Sage license server.

Important:

Before you can use Sage Master Builder with your activated license, you have to specify the computer on your network that is the Sage license server when you launch Sage Master Builder.

Where is the Sage license server located?

The Sage license server is software running on a computer on your network that manages the Sage Master Builder products and features that you purchased. Products and features can be a "core product," additional "modules," and a number of "license uses." The computers running your Sage Master Builder have to be connected to the computer running the Sage license server so that the correct products, features, and number of license uses are available to you.

Related topics...

Setting the Administrator password

License Administration Tool Logon

About accessing the License Administration Tool

You use the License Administration Tool for two purposes:

- To activate and manage your Sage Master Builder product license, you must log on to the License Administration Tool in administration

mode. At the first launch of the tool, you can set the administration password. Use administration mode to add and update the product licenses, change the password, set up License Groups and license use reservations.

• To view who on your network is using Sage Master Builder, open the License Administration Tool read-only mode.

> **Important:**
> • We strongly recommend that you write down your the License Administration Tool password and save it in a safe place. If you forget your password, you have to call Sage Customer Support to reset it.
> • Before you can log on and manage the license using the License Administration Tool from a client workstation, the `\MB7` folder must be shared on the computer that is the Sage license server. For information about sharing folders, see the Microsoft Windows Help.

When you launch the License Administration Tool, the program displays the **License Administration Tool Logon** window. This window offers two options:

• Open the License Administration Tool in read-only mode. Use this mode to determine who is using Sage Master Builder. For example, you need to use Sage Master Builder for a task that requires exclusive access. When you open the tool in read-only mode, you can see who is using the program.

• Open the License Administration Tool in administration mode. Use this mode to manage, add, or remove license uses or to register new modules. The first time you open the License Administration tool, you must set the password. Selecting this option, displays a box or boxes for setting your password and two links, **I forgot my password** and **Change password**. Clicking either of these links launches other windows which enable you either to change or reset the administration password.

Logging on with read-only mode

1. Double-click the LA desktop icon.

2. On the License Administration Tool Logon window, accept the
   option, **Open the License Administration Tool in read-only mode**.
   For example, use read-only mode to determine who is using Sage
   Master Builder.

3. Click **OK**, then click **OK** on the message window.
   The License Administration Tool opens in read-only mode.

Logging on with administration mode

1. Double-click the LA desktop icon.

2. On the **License Administration Tool Logon** window, select the
   option, **Open the License Administration Tool in administration
   mode**. For example, use this mode to add or remove license uses or
   to register new modules.

3. In the **Password** box, type your password.

   Note:

   Your License Administration Tool password is case-sensitive.

4. Click **OK**, then click **OK** on the message window.
   The License Administration Tool opens in administration mode.

Setting the password

Important:

• We strongly recommend that you write down your
  administrator user password and save it in a safe place. If
  you forget your password, you have to call Sage Customer
  Support to reset it.

• Before the Administrator can log on and manage the license
  using the License Administration Tool from a client
  workstation computer, the \MB7 folder must be shared on
  the computer is the Sage license server. For information
  about sharing folders, see the Windows Help.

After the License Administration Tool has been successfully installed,
clicking the License Administration Tool desktop icon opens the **License
Administration Tool Logon** window.

To set the administrator user password:

1. In the **Password** box, type a password.

    Note:

    Your License Administration Tool password is case-sensitive.

2. In the **Confirm Password** box, re-type the password and click **OK**.

3. The **License Administration Tool** window opens. From this window you can manage your product license, license groups, and license use reservations.

Changing the password

Important:
*   We strongly recommend that you write down your administrator user password and save it in a safe place. If you forget your password, you have to call Sage Customer Support to reset it.
*   Before you can log on and manage the license using the License Administration Tool from a client workstation, the `\MB7` folder must be shared on the computer that is the Sage license server. For information about sharing folders, see the Microsoft Windows Help.

To change the administration password:

1. Double-click the LA desktop icon.

2. On the **License Administration Tool Logon** window, select the option, **Open the License Administration Tool in administration mode**. For example, use this mode to add or remove license uses or to register new modules.

3. Click the text link, **Change my password**.

4. On the **Change Password** window in the **Old Password** box, type your old password.

5. In the **Password** box, type a new password.

6. In the **Confirm Password** box, type a new password again, and click **OK**.

   The **License Administration Tool** window opens. From this window you can manage your product license, license groups, and license use reservations.

Resetting the password

To reset the administrator user password, you have to contact Sage Customer Support.

Important:

- We strongly recommend that you write down your administrator user password and save it in a safe place. If you forget your password, you have to call Sage Customer Support to reset it.
- Before the Administrator can log on and manage the license using the License Administration Tool from a client workstation computer, the \MB7 folder must be shared on the computer that is the Sage license server. For information about sharing folders, see the Windows Help.

To reset the administrator user password:

1. On the **Logon Administrator Password** window, click **I forgot my password**.
   The **Forgotten Password** window opens.

2. Read the instructions, phone Sage Customer Support at 800-866-8049, and type the temporary password they provide in the box.

   You can also ask them to send you the temporary password in an email message. From that message, you can copy and paste the temporary password into the **Forgotten Password** box.

Important:

Type the temporary password exactly as provided by Sage Customer Support. Passwords are case-sensitive.

3. Click **OK**.

4. The **Change Password** window opens. The temporary password is now displayed in the **Old Password** box. The temporary password acts as your old password and allows you to set a new password.

5. In the **New Password** box, type a new password.

   In the **Confirm Password** box, re-type the new password and click **OK**.
   The **License Administration Tool** window opens. From this window you can manage your product license, license groups, and license use reservations.

Monitoring Product and Feature Use

About monitoring product and feature use

After activating licenses and reserving the use of Sage Master Builder, you can monitor the license use and group reservations from the **License Administration Tool** window.

Tip:

The terms you see in this topic, such as Status, License Type, and so forth are defined in the Glossary under **License Administration Tool**.

When you select a **Floating use License Type** with reservations in the **License Administration Tool** window, the window displays the following grids:

• License details for product line

• Summary of product or feature use

• Current users of the product or feature

When you select a **Floating use License Type** without reservations, the window displays the license details **Current users of the product or feature** grid.

When you select a **Site License Type**, the window displays the license details grid and definitions for the **Product Line**, **Product or Feature**, and **License Type**.

Note:

If you have not added licenses, the grids on the **License Administration Tool** window are empty.

License details for product line

After you add licenses, the license details grid displays the following information for the product line:

- Status
- **Product Line** (Hidden by default. To display, right-click a column heading in the grid and select **Hide/Show Columns** > **Product Line**.)
- Product or Feature
- **Reservations Allowed** (Hidden by default. To display, right-click a column heading in the grid and select **Hide/Show Columns** > **Reservations Allowed**.)
- License Type
- Total Uses
- Available Uses
- In Use
- Expiration Date
- Version

Summary of product or feature use

After you reserve the use of products and features for a floating use license, the **Summary of product or feature use** grid displays the following information for the license that you select in the license details grid.

- Reserved For
- Total
- Available
- In Use

Current users of the product or feature

After you activate floating use licenses, the Current users of the product or feature grid displays the following information for the license that you select in the license details grid.

- User Name

- Reserved Under

- Computer Name

- Session ID

- In Use Since

Show and Hide Column Features

About showing or hiding columns

Use the **Show/Hide Columns** window to select the columns that you want to display in the license details grid on the **License Administration Tool** window.

Related topics...
Showing columns
Hiding columns
Hiding all columns

Showing columns

To monitor license use, you may choose to show columns.

To show columns:

1. From the **License Administration Tool** window, right-click a column heading in the license details grid and select **Hide/Show Columns**.

2. From the **Show/Hide Columns** window, select the columns that you want to display or click **Show All**.

3. Click **OK**.

Related topics...

Hiding columns

You may want to hide one or several columns for business security reasons.

To hide a column:

1. From the **License Administration Tool** window in the license details grid, right-click the column heading that you want to hide.

2. Select **Hide Column**.

Related topics...

Hiding all columns

You may want to hide all the columns for business security reasons.

Note:

You cannot hide the **Product** or **Feature** column.

To hide all columns

1. From the **License Administration Tool** window, right-click a column heading in the license details grid and select **Hide/Show Columns**.

2. From the **Show/Hide Columns** window, click **Hide All**.

3. Click **OK**.

Related topics...

[About monitoring product and feature use](#)

[About showing or hiding columns](#)

[Hiding columns](#)

Managing Licenses

About managing licenses

Use the **Manage Licenses** window to add product keys, update product keys, and activate licenses.

Related topics...

[Importing the license file](#)

[Adding or updating product keys](#)

[Activating licenses](#)

Importing the license file

License activation is based on either importing a license file or manual entry of up to four product keys. Take a moment to locate your product keys. They are a series of 16-letter codes used to activate your license. They have been sent to you in a license file attached to an email from your business partner, on your Sage Master Builder packing slip, and/or on a sticker on the CD envelope.

Use the **Import License File** window to import a license file into the Sage license server.

Note:

If you did not receive a license file in an email message, follow the instructions for [adding or updating product keys](#).

To import the license file:

1. Open the e-mail message with the attached license file from Sage or your business partner.

2. Save the license file attachment to the Windows desktop.

3. From the **License Administration Tool** window, click **Manage Licenses**.

4. From the **Manage Licenses** window, click **import the license file**.

5. From the **Import License File** window, select the license (.lic) file name and click **Open**.

6. From the **Manage Licenses** window, click **activate the licenses**.

7. Click **Close**.

Related topics...

About managing licenses

Adding or updating product keys

Activating licenses

Adding or updating product keys

License activation is based on either importing a license file or manual entry of up to four product keys. Take a moment to locate your product keys. They are a series of 16-letter codes used to activate your license. They have been sent to you in a license file attached to an email from your business partner, on your Sage Master Builder packing slip, and/or on a sticker on the CD envelope.

Use the **Add or Update Product Keys** window to type the product keys. Each time you add or make changes to licenses, you will receive new product keys.

Note:

If you received an e-mail message with an attached license file from Sage, follow the instructions for importing the license file.

To add or update product keys:

1. From the **License Administration Tool** window, click **Manage Licenses**.

2. From the **Manage Licenses** window, click **type the product keys**.

3. In the **Type the product keys** boxes on the **Add or Update Product Keys** window, type the product keys listed on your CD envelope or that are printed on your packing slip.

4. On the **Add or Update Product Keys** window, click **Accept Product Keys**.

5. Click **Accept Product Keys**.

6. On the **Manage Licenses** window, click **activate the licenses**.

7. Click **Close**.

Related topics...

About managing licenses

Importing the license file

Activating licenses

Activating licenses

After importing the license file or entering product keys, you have to activate your licenses.

To activate your license:

1. On the **Manage Licenses** window, either import the license file or add the product keys.

2. Click **activate the licenses**.

3. Click **Close**.

When you see two green check marks by **Step 1** and **Step 2**, you know that your license has been activated. You can now launch the License Administration Tool and specify the computer on your network that is the Sage license server.

Related topics...

About managing licenses

Importing the license file

Adding or updating product keys

Managing Reservations

About managing group reservations

Use the **Group** and **Uses** columns on the **Manage Reservations** window to reserve product and feature uses for groups.

When a user logs in to a Sage Master Builder company, the Sage license server assigns a license use from the first available group to which the user belongs. If no reserved license uses are available, the Sage license server assigns a license use from the unreserved license uses.

Important:

If no reserved or unreserved license uses are available, you cannot launch Sage Master Builder connected. You can only launch the program disconnected with exclusive access.

Setting up group reservations

Use the **Group** and **User** columns on the **Manage Reservations** window to reserve license uses for groups.

When a user logs in to a Sage Master Builder company, the Sage license server assigns a license use from the first available group to which the user belongs. If no group reservations are available, the Sage license server assigns a license use from the unreserved uses.

Important:

You must import the license file or enter product keys before you set up group reservations.

To set up group reservations:

1. From the **License Administration Tool** window, click **Manage Reservations**.

    The **Manage Reservations** window for this product line opens.

2. In the **Group** column, type the name of the first group of users.

    You can assign any group name that works for your purposes.

3. In the **Uses** column, type the number of license uses that you want to reserve for this group.

   Important:

   The total number of **Uses** for all groups cannot exceed the **Total Uses** listed for this product on the **License Administration Tool** window.

4. Repeat steps 2 and 3 for each group.

   Tip:

   If you want to retain some unreserved license uses, do not reserve all license uses for groups.

5. Click **OK**.

   Related topics...

   About managing licenses

   Activating licenses

   Removing group reservations

Removing group reservations

You may need to create new reservation groups when you hire new employees or open a new office.

To remove group reservations:

1. From the **License Administration Tool** window, click **Manage Reservations**.

2. From the **Management Reservations** window, select the row for the **Group** that you want to remove.

3. Click the **Delete the selected row** (the X button).

4. Click **OK**.

Troubleshooting Network Disconnection Issues

Disconnected from the network

Note:

This information does not apply if you are running Sage Master Builder and the Sage license server on one computer as a stand-alone installation.

If a workstation is disconnected from the Sage license server while you are using the License Administration Tool, the system displays a **Disconnected from the License Server** message.

Since our products run on your company's network, it is important to maintain the network connection between workstations and the Sage license server. When your workstation is disconnected from the Sage license server, you cannot perform license administration functions using the License Administration Tool on the workstation.

To reconnect to the license server:

1. Wait a few minutes, and then try again to use the License Administration Tool.

2. If the workstation is still disconnected, check whether the network cable is unplugged.

3. If the workstation remains disconnected, check whether a network drive is disconnected.

4. Contact your network administrator.

When the connection is restored, the License Administration Tool returns to normal and you can perform any of its functions.

Related topics...

Network cable unplugged

Disconnected network drive

Network cable unplugged

When the network cable is unplugged from your workstation, you cannot perform license administration functions using the License Administration Tool.

To check whether a network cable is unplugged:

1. Check the notification area, at the far right of the taskbar, for this message: **A network cable is unplugged.**

2. If you see this message, reconnect the network cable to the workstation.

3. If you do not see this message, check the network connections.

    a. Click **Start**, and select **Control Panel** > **Network Connections**.

    b. In the **LAN or High-Speed Internet** section, check the **Status** of the **Local Area Connection**.

    c. If the **Status** is **Network cable unplugged**, reconnect the network cable to the workstation.

    d. If the **Status** is **Connected**, the network cable is connected to the workstation.

4. Try to use the License Administrator Tool.

> **Related topics...**
>
> Disconnected from the network
>
> Disconnected network drive

Disconnected network drive

When your workstation is disconnected from the network drive for the Sage license server, you cannot perform license administration functions using the License Administration Tool.

To check whether a network drive is disconnected:

1. Click **Start**, and select **My Computer**.

2. In the **Network Drives** section, check the **Type** column for the network drive for the Sage license server.

3. If the **Type** is **Disconnected Network Drive**, select the network drive and then select another network drive.

4. If the **Type** changes to **Network Drive**, try to use the License Administrator Tool.

5. If the **Type** remains **Disconnected Network Drive**, contact your network administrator.

Related topics...

Disconnected from the network

Network cable unplugged

Chapter 5

License Use and Sage Master Builder

This chapter provides information about the following:

Specify Sage License Server

Running Sage Master Builder Connected

Specify Sage License Server

About specifying the Sage License Server

Before you can use Sage Master Builder with your activated license, you have to specify the computer on your network that is the Sage license server. There are two ways to specify the Sage license server:

- You can select the computer from the list of computers on your network or

- You can enter the IP Address or name of the computer

Related topics...

Selecting the Sage license server computer

Entering the IP Address or name of the computer

Determining the name of a computer

Determining the IP Address of a computer

What is an IP Address?

What is a server?

Selecting the Sage license server computer

One method is to select the computer running the Sage license server from the list of network computers.

Note:

To use this method of selecting a server from the list of network computers, you must have already clicked the appropriate link on the **Specify Sage License Server** window.

To select the computer running Sage license server from the list of network computers:

1. On the **Select License Server** window from the list of network computers, select the computer running the Sage license server.

2. Click **OK**.

Related topics...

About specifying the Sage license server

Entering the IP Address or name of the computer

Determining the name of a computer

Determining the IP Address of a computer

Entering the IP Address or name of the computer

One method is to enter the IP Address or name of the computer running the Sage license server.

Note:

To use this method of selecting a server from the list of network computers, you have already clicked the appropriate link on the **Specify Sage License Server** window.

To enter the IP Address or name of the computer running the Sage license server:

1. In the text box, type the IP Address or name of the computer.

2. Click **OK**.

Related topics...

About specifying the Sage license server

Selecting the Sage license server computer

Determining the name of a computer

Determining the IP Address of a computer

What is an IP Address?

Determining the name of a computer

Note:

If you are trying to determine the name of the computer running the Sage license server, you must complete this procedure on that computer.

To determine the name of a computer:

1. Click **Start**, **Settings**, and then **Control Panel**.

2. From the list, scroll to and double-click **System**.

3. The **System Properties** window appears.

4. Locate the line **Full computer name,** and write it down or type it into a note that you can print.

5. Click **Cancel**.

Related topics...

About specifying the Sage license server

Entering the IP Address or name of the computer

Determining the IP Address of a computer

Determining the IP Address of a computer

Note:

If you are trying to determine the IP Address computer running the Sage license server, you must complete this procedure on that computer.

To determine the IP Address of a computer:

1. Click **Start**, then **Run**.

2. In the **Open** text box, type **cmd**, then click **OK**.

3. The **\Windows\...\cmd.exe** window appears.

4. At the prompt, type **ipconfig**.

   For example, you might see H:\. Type **ipconfig** after the drive letter. When you press the Enter key, the system displays several addresses, among which is the IP Address of the computer. You see a line similar to this:
   IP Address 172.20.22.142

Related topics...

About specifying the Sage license server

Entering the IP Address or name of the computer

What is an IP Address?

What is a server?

What is an IP Address?

Every computer connected to the Internet is assigned a unique number known as an Internet Protocol (IP) address. This numeric address of a computer on the Internet is written as a set of four numbers separated by periods (each number can range from 0 to 255). An example of an IP Address is 123.123.4.5.

Note:

If you are trying to determine the IP Address of the computer running the Sage license server, you must complete the procedure on that computer.

Related topics...

About specifying the Sage license server

Entering the IP Address or name of the computer

Determining the IP Address of a computer

What is a server?

What is a server?

There are many kinds of servers. Some servers are denoted by their hardware configuration and a specialized operating system. Other servers consist of specialized software applications running on standard computers.

Some servers are called "file servers" and may be a powerful computer dedicated to storing files and data. For example, Sage Master Builder company data can be stored on a file server. Any Sage Master Builder user on the same network as the file server can access and store data there.

A server can also be a software application that provides a specific kind of service to client software running on other computers. The term server can refer to a particular piece of software, such as the Sage license server. When we refer to the Sage license server, we are describing a computer that is running the Sage license server software.

Running Sage Master Builder Connected

Launching and running Sage Master Builder connected

Note:

If you are having a problem running Sage Master Builder connected, it is very likely a network problem or your computer's connectivity to your network. If problems persist, consult with your local system administrator.

The desired **Sage License Server Connection State** is: **Connected: License use acquired**. This connection state allows you to use all the power of the Sage Master Builder product that you purchased and licensed. Running connected means that your computer is connected to the Sage license server, and there is a license use available to you.

Prerequisites for a launching and running connected include:

- An activated Sage Master Builder product license. The administrator user activates the product license using the functions of the License Administration Tool.

- A network connection, if you are on a network. This only pertains to working in a network environment and does not pertain to a single computer running in a stand-alone environment.

- The Sage license server that has been specified from the computer running Sage Master Builder.

- An available license use.

- Being a user and having access to a Sage Master Builder company.

To launch and run Sage Master Builder connected:

1. Double-click the Sage Master Builder desktop icon.

2. The **Specify Sage License Server** window appears.

3. Choose one of the following:

    - **Select the Sage license server from the list of computer on your network.**

    - **Enter an IP Address or name of the computer that is the Sage license server.**

4. When you have satisfied the conditions to specify the Sage license server, click **OK**.

    Sage Master Builder begins its launch process.

5. On the **Company List** window, select a company, or click **Cancel**.

6. From the **Company List** window, select a company.

7. On the **User Name and Password** window, enter your user name and password.

8. Sage Master Builder opens the company.

You are now running Sage Master Builder connected.

About the Sage License Server Connection states

You can view the current connection state to the Sage license server in the **About Sage Master Builder** window. Your connection state is defined by several factors involving your network connectivity and the availability of license uses. The following table presents connection state definitions:

Sage license server connection state	About Sage Master Builder window displays
Connected You have launched Sage Master Builder but not logged in to a company yet.	Connected: License use not acquired.

Sage license server connection state	About Sage Master Builder window displays
Connected You have successfully logged in to a company.	Connected: License use acquired.
Connected After a successful login, you have chosen to open a new company, change user name/ access, or change the Sage license server.	Connected: License use returned.
Originally connected, later disconnected, now reconnected You have successfully logged in, but you lost connection to Sage license server and the license use has expired. Now you are connected again but when you try to acquire a license use, no uses are available.	Connected: License use lost.
Disconnected You are disconnected at launch or at subsequent log in when selecting a company.	Disconnected: x uses remaining, or Disconnected: One use remaining.
Connected Your educational or trial product has expired.	Activated license has expired.
Connected Your unauthorized product has expired.	The seven-day grace period for license activation has expired.

Note:

If the computer running the Sage license server becomes disconnected from the other computers on your network, or if your computer becomes disconnected from the Sage license server, you may see an alert message from Sage Master Builder telling you that you are disconnected.

Viewing the Sage license server connection state

You can view the current connection state of the Sage license server. This may help you in situations where your Sage license server connection status is not what you expect it to be. Viewing the connection state can help you troubleshoot problems.

To view the Sage license server connection state:

1. From the Sage Master Builder main window, click **Help**, then click **About Sage Master Builder**.

   The **About Sage Master Builder** window appears.

2. In the lower right of the window just above the **Close** button, look for **Sage License Server Connection State**.

   The text in the box displays the current connection state.

Company List window

About the Company List window

During installation, you have the option to install Sage Master Builder on a specific local drive, such as C:, D:, etc. When you launch Sage Master Builder, the first window that appears is **Company List**. From this window, you select the location of company you want to open, then you select the company itself, and click **OK**.

For example, if you have installed Sage Master Builder and the Sample Company on local drive C:, and this is the first time you have launched the program, then the program displays the local drive, and the Sample Company appears in the list directly below.

In most business situations, the company that you use to manage your business is not located on your local computer; it is located on a server computer on your local area network. The server could be a dedicated server in a client/server configuration or it could be a colleague's computer in the next office using a peer-to-peer configuration.

In a network environment, clicking the drop-down arrow displays all the local drives and all the network drives that you have access to. In the following graphic, you can see a list of network drives that have been mapped to from this computer.

If you can see the shared network drive in the list, then you can access the Sage Master Builder company located on that drive. If you cannot see the drive where the company is located, then ask yourself these questions or consult with your network administrator to locate your company.

1. Have you lost your network connection? If you have, then you cannot access network drives and the Sage Master Builder company.

2. Has the server lost its network access or crashed? If that has happened, then you can access the server and the company.

3. Has the company been moved to a different computer and drive? If that's true, the you have to map to the network drive in its new location.

Mapping a network drive to access a company

You may have to map to a network drive to access a Sage Master Builder company if it is not located on a drive on your local computer. Let's suppose that the company has been moved to network drive Z: Now to access the company data, you have to map to drive Z.

To map a network drive to access a company:

1. On your Windows desktop, click **Start > Explore**.

2. On the tool bar, click **Tools > Map Network Drive**.

3. On the **Map Network Drive** window, click **Browse**.

4. Locate the drive, and then click **OK**.

5. On the **Map Network Drive** window, click **Finish**.

6. Launch Sage Master Builder.

7. On the **Company List** window, select drive Z.

8. Select the company, and click **OK**.

Related topics...

About the Sage License Server Connection states

Mapping a network drive to access a company

Chapter 6

Special Configurations

This appendix provides information about the following:

Windows 7 Professional and Server 2008 R2 Standard Operating Systems

Launching Sage Master Builder to run as administrator for scheduling reports

Important:

On computers running Windows 7 Professional or Server 2008 R2 Standard, scheduling Sage Master Builder reports and viewing **My Scheduled Reports** requires that you to "run as administrator" or to "run the program as administrator."

Microsoft Windows has changed security rules in the Windows 7 Professional and Server 2008 R2 Standard operating systems to make your computer more secure. If you are running Sage Master Builder as a typical user, then you have limited privileges in some areas of the program, such as saving a report schedule or viewing **My Scheduled Reports**. So, to save a report schedule or view **My Scheduled Reports**, you must launch Sage Master Builder with the command to either **Run as administrator** or **Run this program as an administrator**.

When you select either command, the settings are limited to you personally. Your settings to run Sage Master Builder as administrator do not affect the next person who logs on and launches Sage Master Builder from this computer. Your settings on this computer can either be temporary or persistent. For example, when you select **Run as administrator**, you run the program as administrator for that session only. When you select **Run this program as an administrator**, you set program properties to always run the program as administrator when you log on to this computer.

Note:

Run as administrator and **Run this program as an administrator** are not related to Windows 7 Professional or Server 2008 R2 Standard operating systems user groups but are limited to a specific program you are running.

To set Run as administrator:

1. On your Windows desktop, right-click the Sage Master Builder program icon.

2. From the drop-down menu, to launch the program, click **Run as administrator**.

   Note:

   Selecting **Run as administrator** only runs the current session of running Sage Master Builder. The setting does not persist.

To set Run this program as an administrator:

1. On your Windows desktop, right-click the Sage Master Builder program icon.

2. From the drop-down menu, click **Properties**.

3. On the **Sage Master Builder Properties** window, click the **Compatibility** tab.

4. Under **Privileges Level**, select **Run this program as an administrator**.

5. Click **Apply**, and then click **OK**.

   Note:

   Selecting **Run this program as an administrator** always runs the program with these properties when you launch the program on this computer. The setting persists.

Windows 7 Professional and Server 2008 R2 Standard "Sleep Mode" prevents computers from obtaining a license use

If a computer running the Windows 7 Professional or Server 2008 R2 Standard operating system is used as a license server, when it goes into sleep mode other computers on the network can't obtain a license. Possible resolutions are:

• Use a different computer on your network to be the Sage license server. Any supported operating system can be used in place of

Windows 7 Professional or Server 2008 R2 Standard. For example, use a computer running Windows XP Professional.

- Set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to "Never:"

1. Click **Start > Control Panel > System and Security > Power Option**s.

2. Select **Change when computer sleeps**.

3. From the **Put computer to sleep** list, select **Never**.

Sage licensing (Sage Service Host) cannot auto-start on Windows 7 Professional and Server 2008 R2 Standard

The Sage licensing service (Sage Service Host) cannot auto-start on computers running the Windows 7 Professional or Server 2008 R2 Standard operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.

Solution for Server 2008 R2 permission error message

If you encounter a permissions error message when launching Sage Master Builder on a computer running Windows Server 2008 R2, follow these steps to resolve the issue:

1. On the Window desktop, right-click **Start**, and then click **Open Windows Explorer**.

2. On the left side of the window, under **Computer > Local Disk**, right-click the `\MB7` folder, and then select **Properties**.

3. On the **MB7 Properties** window, click the **Security** tab.

4. From the list under **Group or User Names**, select **USERS**, and then click the **Edit** button.

5. On the **Permissions** window, select **USERS** again, and under **Allow**, select the **Full control** check box.
    Selecting **Full control**, selects all the check boxes necessary for this solution.

6. On the **Permissions** window, click **OK**, and then on the **MB7 Properties** window, click **OK**.

Server 2008 R2 network configuration and TCP Remoting Channel

Sage Master Builder uses the TCP Remoting Channel, a Microsoft .NET Framework component to enable communication among computers on a network. File and printer sharing on computers running the Server 2008 R2 operating system must be enabled. To enable file sharing, follow the instructions in the Windows Server 2008 R2 Help.

Windows Vista and Server 2008 Operating Systems

Installation and AutoPlay

Program installations begin immediately upon inserting the CD into the CD-ROM drive if **AutoPlay** is set to begin automatically. With computers running the Windows XP operating system, you can start the installation manually by using the **Start > Run > Browse** command to locate and select `setup.exe`. With computers running the Vista and Server 2008 operating systems, this command path has changed.

- On Vista, click the Vista button (left circular button at lower left of the system tray) to open a window with the **Start/Search** text box at the bottom. Type `setup.exe` in the text box, and press the Enter key. When the system search locates the file on the CD, double-click the file to begin the installation process.

- On Server 2008, click **Start > Run > Browse**. Locate `setup.exe`, on the CD, and double-click the file to start the installation.

Launching Sage Master Builder to run as administrator for scheduling reports

Important:

On computers running Vista or Server 2008, scheduling Sage Master Builder reports and viewing My Scheduled Reports requires that you to "run as administrator" or to "run the program as administrator."

Microsoft Windows has changed security rules in the Vista and Server 2008 operating systems to make your computer more secure. If you are running Sage Master Builder as a typical user, then you have limited privileges in some areas of the program, such as saving a report schedule or viewing **My Scheduled Reports**. So, to save a report schedule or view My Scheduled reports, you must launch Sage Master Builder with the command to either **Run as administrator** or **Run this program as an administrator**.

When you select either command, the settings are limited to you personally. Your settings to run Sage Master Builder as administrator do not affect the next person who logs on and launches Sage Master Builder from this computer. Your settings on this computer can either be temporary or persistent. For example, when you select **Run as administrator**, you run the program as administrator for that session only. When you select **Run this program as an administrator**, you set program properties to always run the program as administrator when you log on to this computer.

Note:

Run as administrator and **Run this program as an administrator** are not related to Vista or Server 2008 operating systems user groups but are limited to a specific program you are running.

To set Run as administrator:

1. On your Windows desktop, right-click the Sage Master Builder program icon.

2. From the drop-down menu, to launch the program, click **Run as administrator**.

   Note:

   Selecting **Run as administrator** only runs the current session of running Sage Master Builder. The setting does not persist.

To set Run this program as an administrator:

1. On your Windows desktop, right-click the Sage Master Builder program icon.

2. From the drop-down menu, click **Properties**.

3. On the **Sage Master Builder Properties** window, click the **Compatibility** tab.

4. Under **Privileges Level**, select **Run this program as an administrator**.

5. Click **Apply**, and then click **OK**.

   Note:

   Selecting **Run this program as an administrator** always runs the program with these properties when you launch the program on this computer. The setting persists.

Vista and Server 2008 "Sleep Mode" prevents computers from obtaining a license use

If a computer running the Vista or Server 2008 operating system is used as a license server, when it goes into sleep mode other computers on the network can't obtain a license. Possible resolutions are:

• Use a different computer on your network to be the Sage license server. Any supported operating system can be used in place of Vista or Server 2008, for example, Windows XP.

• Set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to "Never:"

1. **Start > Control Panel > System and Maintenance > Power Option**s.

2. Select **Change when computer sleeps**.

3. From the **Put computer to sleep** list, select **Never**.

Sage licensing (Sage Service Host) cannot auto-start on Vista and Server 2008

The Sage licensing service (Sage Service Host) cannot auto-start on computers running the Vista or Server 2008 operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.

Solution for Server 2008 error message about mb7.kpr file

If you encounter an error message about opening the `mb7.kpr` file when launching Sage Master Builder on a computer running Windows Server 2008, follow these steps to resolve the issue:

1. On the Window desktop, right-click **Start**, and then click **Explore**.

2. On the left side of the window, under **Folders**, right-click the MB7 folder, and then select **Properties**.

3. On the **MB7 Properties** window, click the **Security** tab.

4. From the list under **Group or User Names**, select **USERS**, then click the **Edit** button.

5. On the **Permissions** window, select **USERS** again, and under **Allow**, select the **Full control** check box.
   Selecting **Full control**, selects all the check boxes necessary for this solution.

6. On the **Permissions** window, click **OK**, and then on the **MB7 Properties** window, click **OK**.

Vista/Server 2008 installation and mapped drives

Mapped drives may not be available when installing on a computer running the Vista or Server 2008 operating systems. See the Microsoft

knowledgebase article about allowing mapped drives to display elevated users: http://support.microsoft.com/kb/937624/

Note:

If you need to install to a mapped drive, install the program to a computer that is running another supported operating system, such as Windows XP.

Vista and Server 2008 network configuration and TCP Remoting Channel

Sage Master Builder uses the TCP Remoting Channel, a Microsoft .NET Framework component to enable communication among computers on a network. File and printer sharing on computers running the Vista/Server 2008 operating system must be enabled. To enable file sharing, follow the instructions in the Vista/Server 2008 Help.

Vista and Server 2008 and changing the Sage License Server computer

On a Vista or Server 2008 workstation, when you select **File > Change Sage License Server > Select the computer from the list of computers on your network**, the command may fail to generate a list of network computer names. To resolve this issue, click **Enter the IP address or name of the computer** and type the IP Address of the server computer in the box.

Windows Server 2003 Operating System

Note:

Configuration for Windows Small Business Server 2003 is the same as configuration for Windows Server 2003.

Configuring Windows Server 2003 date format

It is necessary when using Windows Server 2003 to configure the date format.

To configure the Windows Server 2003 date format:

1. Click the **Start** button, point to **Control Panel**, then click **Regional and Language Options**.

2. On the **Regional and Language Options** dialog box, on the **Regional Options** tab, click the **Customize...** button.

3. On the **Customize Regional Options** dialog box, click the **Date** tab.

4. Under **Short date,** from the **Short date format** drop-down list, select **MM/dd/yyyy**.

5. Click **OK**.

6. To close **Customize Regional Options**, click **OK** again.

Setting up Windows Server 2003 for PDF and RTF printers

In Windows Server 2003 (Standard Edition) and Windows Server 2003 (Enterprise Edition), the installation of kernel-mode drivers is blocked by default. Before you can install Sage Master Builder PDF and RTF printers with Windows 2003 Server, you have to unblock the installation of the kernel-mode drivers and edit the Group Policy.

To unblock the installation and edit the Group Policy:

1. On your Windows Server desktop, click **Start**, then **Run...**.

   The **Run** dialog box opens.

2. In the **Open:** text box, enter `gpedit.msc`, and then press the Enter key.

   The **Group Policy** window opens.

3. In the left pane, on the **Tree** tab, double-click the **Administrative Templates** folder.

4. Then double-click the **Printers** folder.

5. In the right pane, in the **Setting** list, find and set the state of the setting for **Disallow installation of printers using kernel-mode drivers** to **Disable**.

Windows XP Professional (SP2) Operating System

Configuring the Windows XP Professional date format

To configure the date format:

1. Click the **Start** button, point to **Settings**, and click **Control Panel**.

2. Double-click the **Regional and Language Options** icon, and click the **Regional Options** tab.

3. Click the **Customize** button and the **Date** tab.

4. In the **Short Date Format** list, select **MM/dd/yyyy**.

5. Click **OK**.

Citrix and Terminal Servers

Using Citrix and Terminal Server with Sage Master Builder

Many people use Citrix and Terminal Server to manage remote access to their local area network (LAN). If Sage Master Builder is installed on the computer running Citrix or Terminal Server and on your laptop, then you may log on to the computer running Citrix or Terminal Server with your laptop and work in Sage Master Builder on your LAN. This enables you to work from home, from a job site, or from any number of other remote locations.

We recommend that you use DOS commands to change the operating mode from "execute" to "install" and then back to "execute." When using the DOS commands to install, you may install the Sage Master Builder software as you would on any desktop or Windows server operating system that meets Sage Master Builder requirements.

Installing on computers running Citrix and Terminal Server using DOS commands

To install using DOS commands:

1. Click **Start**, then **Run**.

2. On the **Run** window, in the **Open** drop-down box, type **cmd**, and press the **ENTER** key.

    The **\Windows\...\cmd.exe** window appears.

3. At the prompt, type **change user /install**, and press the **ENTER** key.

    This enables the install mode.

4. Install the Sage Master Builder software as you would on a typical workstation or Windows Server.

5. At the end of the installation process, choose to launch the License Administration Tool.

6. Using the License Administration Tool window, manage your license and activate it.

7. After activation, click **Start**, then **Run**.

8. On the **Run** window, in the **Open** drop-down box, type **cmd**, and press the **ENTER** key.

9. The **\Windows\...\cmd.exe** window appears.

10. At the prompt, type **change user /execute**.

    This enables the execute mode, which is the default mode for running Citrix and Terminal Server.

11. Exit the **Run** window.

12. Restart the server.

Important:

*   Before users will be able to launch Sage Master Builder through the Terminal Server, the server must be restarted.
*   If this message appears: "Install mode does not apply to a terminal server configured for remote administration," then it is not necessary to enable the install mode. You may install the Sage Master Builder software as you would on a typical workstation.

Backing Up Your Data

Data backup

With any computer system, there is the possibility for failure and loss of data. For more information about backing up data, refer to the Sage Master Builder Help.

Caution!

Use a backup method and device suitable for your business requirements. We strongly recommend that you maintain a routine backup schedule and store your data in a safe environment that is separate from your server, preferably off site.

Which files to back up in Sage Master Builder

Note:

This topic only applies to existing Sage Master Builder customers.

When you back up your company data, we recommend that you back up your company financial data as well as all your custom reports and forms. If you are running multiple Sage Master Builder companies, back all of them up.

When backing up data as part of the year-end close process, it is important to count the number of files and folders in your company. To see the number of files and folder in a company folder, in Windows

Explorer, right-click the company folder and select **Properties**. On the **Properties** window, the **General** tab, look in the list for the **Contains** line for the number of files and folders. Write this number down so that you can refer to it after you have made the two copies. The number of files and folders has to be exactly the same in both the company and the backup copy.

Caution!
If you are working across a network, you must remember to backup company folders, report folders, and form folders that reside at the server.

We strongly recommend that you back up:

- Each company folder that contains financial data (\MB7\your company\)

- The **Custom Reports** folder (\MB7\Custom Reports)

- The **Report Forms** folder (\MB7\Report Forms)

- The **System Reports** folder (\MB7\System Reports)

Caution!
When backing up your data, be sure to make a full backup and not an incremental or differential backup. An incremental or differential backup only records alterations to the data since the last backup.

An example of one backup method

There are various methods for backing up your data. Depending on the amount of data entry you routinely perform, you might consider making full daily backups. It is also a good idea to regularly take one backup off the business premises or store them in a fireproof safe. If a burglary or fire occurs, a copy of your data is safe from harm.

One reliable procedure, requiring a tape drive and multiple sets of tapes, requires you to make daily and monthly backups. For the daily backup process, you need 10 tapes. Label five of the tapes as Week A, with a tape designated for each weekday. Label the other five tapes as Week B, with a tape designated for each weekday.

Start with the set of tapes labeled Week A. Monday night when you make the backup use the tape labeled Monday, on Tuesday use the tape labeled Tuesday, and so forth. At the start of the next week, use the set of tapes labeled Week B to make your backups. At the end of two weeks, you will have a data backup for each day. Then at the start of the third week, use the set of tapes labeled Week A again. Over the course of a year, you will cycle through the two sets of tapes. Be sure to store the most recent Friday backup off site.

For the monthly backups, you need a separate set of three tapes labeled Month A, Month B, and Month C respectively. Like the weekly backups, use each tape to back up the data for a different month, cycling through each of the tapes over the course of the year. After making a monthly backup, write the month and year on the label to help you track which tape to use next. Be sure to remove the most recent monthly backup off site.

Backing up your data to a CD or DVD

This topic suggests a generic way to back up your data to a CD or DVD.

> <u>**Caution!**</u>
> If you are working across a network, you must remember to backup company folders, report folders, and form folders that reside at the server.

> **Important:**
> Backing up to a CD or DVD successfully depends on your computer system, including hardware and software. To back up to a CD or DVD, you must have access to a CD or DVD (Read/Write capability), and the appropriate CD or DVD media.

When backing up data as part of the year-end close process, it is important to count the number of files and folders in your company. To see the number of files and folder in a company folder, in Windows Explorer, right-click the company folder and select **Properties**. On the **Properties** window, the **General** tab, look in the list for the **Contains** line for the number of files and folders. Write this number down so that you can refer to it after you have made the two copies. The number of

files and folders have to be exactly the same in both the company and the backup copy.

Important:

If the number of files and folders in the original version do not match the numbers in the copy, you must repeat the process. It is imperative that the copy is an exact duplicate of the original company.

To back up your data to a CD or DVD:

1. Place the CD or DVD media in the CD or DVD.

2. On your Windows desktop, right-click **Start** and select **Explore**.

3. In Windows Explorer, locate the **MB7** folder again, right-click the **Custom Reports** folder and from the menu select **Copy**.

4. Locate the CD or DVD drive, and click it.

5. Then in the right-pane, right-click and select **Paste.**

6. In Windows Explorer, locate the **MB7** folder again, right-click the **Report Forms** folder and from the menu select **Copy**.

7. Locate the CD or DVD drive, and click it.

8. Then in the right-pane, right-click and select **Paste.**

9. In Windows Explorer, locate the **MB7** folder again, right-click the **System Reports** folder and from the menu select **Copy**.

10. Locate the CD or DVD drive, and click it.

11. Then in the right-pane, right-click and select **Paste.**

12. In Windows Explorer, locate the **MB7** folder.

13. Right-click a company folder that contains current financial data, and from the menu, select **Copy**.

14. Locate the CD or DVD drive, and click it.

15. Then in the right-pane, right-click and select **Paste.**

16. Repeat 12 through 15 for every active company with current financial data.

Depending on your hardware and software, the folder will be copied to the CD or DVD media. For further information or support, contact your CD or DVD manufacturer.

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