

Sage Master Builder

# Upgrade Installation Guide

## Sage Master Builder Version 15.1

## Overview

### About this guide

The *Upgrade Installation Guide* describes the procedures for installing Sage Master Builder Version 15 on computers where Sage Master Builder Version 14 has already been installed.

If you are installing Sage Master Builder Version 15 on a computer where Sage Master Builder Version 13 or earlier is installed, and that computer has the .NET Framework 3.5 Service Pack 1 installed, you can follow the procedures in this guide. If the computer with Sage Master Builder Version 13 does not have the .NET Framework 3.5 Service Pack 1 installed, you must upgrade to Sage Master Builder Version 14 prior to installing this upgrade.

If you are installing Sage Master Builder on your network for the first time, please refer instead to the *Installation QuickStart Guide* (for new installations) and the procedures in the *Sage Master Builder Installation and License Administration Guide* (Version 14). 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.”

**NOTE:** If you are adding new server or workstation computers to your network, use the new installation procedures.

### About upgrading Sage Master Builder

This version of Sage Master Builder upgrades the software from version 14 to version 15. This upgrade will also update your Sage licensing software automatically.

**IMPORTANT:** Upgrade installations recognize whether the computer is a workstation or the Sage license server. You will not be prompted for configuration options. For example, when you upgrade the Sage license server computer, the installation process recognizes that this computer is a license server installation and upgrades it as a license server. Similarly, when you upgrade a workstation computer, the installation process upgrades the computer as a workstation.

# Upgrade Pre-installation

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

When upgrading from version 14 to version 15, 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.

**NOTE:** SMB version 15 is designed to be installed to computers already running SMB version 14. If you'd like to have SMBv15 running on a new computer please install version 14 first, then install version 15.

Take the following steps 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. For instructions, open the Sage Master Builder Help and search using the Help search shortcut term "databackup" to find the data backup topics.
- 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 "schedulingreports." 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 cannot install the Sage Master Builder upgrade when the program is 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 Sage license server computer on your network**, and begin the upgrade installation process.

# 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.

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, 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 a 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 forms 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 first to the existing Sage license server computer. Install the upgrade to all workstations only after the license server installation is complete.

### To extract the installation package from the downloaded installation file into a local or shared folder:

- 1 Create a folder into which you will extract the SMBv15 Upgrade. For example, you might create a folder under \MB7 named V15Upgrade.
  - For a multi-user/network configuration, create the folder on a shared directory on a network computer.
  - For a stand-alone configuration, create the folder on your computer.
- 2 Locate the file SMB151140.exe that you downloaded from the link contained in your Welcome To SMB Version 15 email. Double-click on that file.
- 3 In the WinZip Self Extractor Window click **Browse**.
- 4 Locate the folder you created in step 1, click **OK** and then click **Unzip**.
- 5 After the file has been unzipped successfully, click **OK** and then click **Close**.

### 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 installation files in the steps above.
- 3 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**.

**4** 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 the 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, but you would like a fresh copy of the Sample Company, rename this folder before installing a fresh copy of the Sample Company.

- b** If you use reports and report forms on a shared drive (for example, you may share reports and form designs on the drive storing your SMB data) you can select this option to update reports and report forms to that drive. This does not install the entire program to the other drive; it only updates the system reports and report forms.

**NOTE:** You cannot install SMBv15 to another drive from the same machine. If you want to install SMBv15 to a drive located on another computer, use these installations steps from that machine.

- 6** Click Next. The installation proceeds.
- 7** On the Installation Complete window, click Finish to launch Sage Master Builder.
- 8** Repeat steps 1-7 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 in your company database from one computer and reschedule your reports, as necessary.

### **Important: Sage license server identification issue**

After installing the Version 14.2 upgrade, Sage Master Builder should automatically identify the same license server computer as it did before the upgrade. 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 simple 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.
- 5 If you need more information, refer to the Sage License Server Help.

# 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 Version 15 of 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 indexes for each company 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 “schedulingreports.” More topics about scheduling reports are located at the end of the topic “About report scheduling.”

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