Sage Residential Management

Version 14.1

Technical System Reference

Table of Contents

Section 1: System Guidance

General

This document provides detailed information about system and environment considerations to ensure your network is ready to install Residential Management. You will also find what you need to prepare before you install. This document is specific to Residential Management requirements. For information about environment and installation considerations for Sage 300 Construction and Real Estate, refer to the Sage 300 Construction and Real Estate *User's Guide*. This and other guides are available on the Product Documents website.

Develop a Plan to Back Up Files

We strongly recommend that you use third-party software to back up all Sage 300 Construction and Real Estate and Residential Management data files to external media on a daily basis.

Consider the following as you develop your backup plan:

- Use third-party backup software for all backups.

- Verify that when a folder is included in a backup, the backup software also includes the subfolders. In other words, the backup software should support recursive backups.

- Schedule backup during off-peak hours, since all users must close Residential Management before you back up files.

- Always back up both the .mdf and .ldf Residential Management database files.

- Review where you store the Residential Management data and back up all data, even if it is outside default folders.

- Store backup media in a secure location outside your building.

- Test backups by restoring them to test folders. These tests are important because backup media may have a limited life, backup devices may malfunction, and you may have incorrect software settings in your backup software.

CAUTION: When you test a backup, keep the restored data separate from your production data.

Creating a Backup of Residential Management data

We recommend two backup software packages that you can purchase to back up your Residential Management data nightly:

- VERITAS® Backup Exec for Windows Servers

- Brightstor® ARCserve for Windows

You can purchase an add-on module for either of these backup applications to back up SQL database files. The add-on module you purchase processes a batch file that stops the SQL server, allows the backup system to back up the specified files, and starts the SQL server. A low cost alternative to purchasing the add-on module is to write a batch file and allow the backup application to run the batch file prior to backing up the Residential Management database files.

Follow the steps below to create text files with instructions for stopping and starting the SQL server:

1 Create two text files using a text editor such as Notepad or WordPad. For example, you can name one file Stop.bat and name the other file Start.bat.

2 Add the following lines to the Stop.bat file:

Net stop mssql$sagerm

net stop sqlserveragent

3 Add the following lines to the Start.bat file:

Net start mssql$sagerm

net start sqlserveragent

4 Schedule your backup system to run the Stop.bat file, back up your Residential Management data files, and then run the Start.bat file.

NOTE: You can also manually enter the commands in steps 2 and 3 above at a command prompt (from the Windows **Start** menu, select **Run** and enter **cmd**).

Assign Full-Control User Rights to All Folders That Contain Sage 300 Construction and Real Estate Application Data Files and Sage 300 Construction and Real Estate Data Files

Assign full-control user rights to all folders that contain Pervasive program files, Sage 300 Construction and Real Estate program files, Sage 300 Construction and Real Estate data files, Residential Management program files, and Residential Management SQL database files. To use Sage 300 Construction and Real Estate and Residential Management, users must have full control of the following files and folders on the files server, terminal server, and workstations that have Sage 300 Construction and Real Estate and Residential Management installed.

CAUTION: Incorrectly modifying Microsoft Windows security may severely affect your system operations. Sage Software is not responsible for operation problems caused by incorrectly modifying your Microsoft Windows security settings. To set permissions on your network or Windows operating system, you must have advanced knowledge of your network. Contact your system administrator for assistance.

- **[Drive]:\Program Files\Timberline Office folder:** This folder is located on the file server, terminal server, and workstations where you installed Sage 300 Construction and Real Estate. It is the default installation location for Sage 300 Construction and Real Estate. However, depending on your system configuration, your company may have renamed this folder or installed it to a different location.

- **[Drive]:\Users\[User name] folder (Windows Vista, Windows 2008 Server, and Windows 7):** This folder is located on the workstation or terminal server where you use Sage 300 Construction and Real Estate. Sage 300 Construction and Real Estate installs necessary files to this folder and requires that the user has full control of it. Typically, the user has full control of this folder by default.

- **[*Drive*]:\ProgramData\Sage\Timberline Office (Windows Vista, Windows 2008 Server, and Windows 7):** This folder is located on the workstation or terminal server where you use Sage 300 Construction and Real Estate Accounting & Management programs. If you are using a workstation as a peer-to-peer server, the folder must also be shared. Sage 300 Construction and Real Estate installs necessary files to this folder and requires that all users have read/write permissions to this folder and all of its subfolders. This folder may be hidden by default. To view hidden folders, open Windows Explorer, select **Tools > Folder Options**, and select the **View hidden files and folders** check box on the **View** tab.

- **Company data folder (Accounting):** Typically, the data folder is located on the file server where you installed Accounting and Management Products.

- **Database and estimates (Estimating):** Typically, these files are located at both the file server and the workstation where you installed Estimating Products.

- **Pervasive installation folder:** By default, Pervasive installs to C:\Pvsw on the file server, terminal server, and workstations where you installed Sage 300 Construction and Real Estate.

- **Windows system folder:** Typically, the Windows system folder is located at C:\Windows or C:\Winnt on your workstation. If your system administrator does not want to give you full control of the local Windows system folder, ask for full control of just the Dbnames.cfg file and Pvsw.log file in the Windows system folder.

- **[Drive:]\RM:** This folder is located on the file server, terminal server, and workstations where you installed Residential Management. It is the default installation location for Residential Management. However, depending on your system configuration, your company may have renamed this folder or installed it to a different location.

NOTE: Each Residential Management user must have at least power user rights on the network for access to the Sage 300 Construction and Real Estate directory, including all subfolders and all files, on the server where Terminal Services is installed and the file server.

Comply With Windows User Account Control (UAC) Requirements

The critical program files are being installed in the normal installation location (the **Program Files** folder by default), while data and all other files are being installed to a shared location. For Sage 300 Construction and Real Estate applications to work correctly, you must ensure you have read/write permissions to these files. For new installations of Sage 300 Construction and Real Estate Accounting & Management on Windows Vista, Windows 2008 Server, or Windows 7 operating systems, these data files are being installed in the [Drive]:\ProgramData\Sage\Timberline Office folder.

If you are upgrading Sage 300 Construction and Real Estate Accounting & Management applications, your data folders will not be moved automatically. You do not need to move your data; however, if you install Windows Vista, Windows 2008 Server, or Windows 7 and your data is not in a shared location, you need to share the data folders and assign read/write permissions, or you must move the folders to a shared location and assign read/write permissions. If you move your data files, ensure you update their locations using File Tools.

NOTE: Some of these folders are hidden in their new location. To view them, open Windows Explorer, select **Tools > Folder Options**, and select the **View hidden files and folders** check box on the **View** tab.

In compliance with UAC requirements, you cannot save a file to a folder to which you do not have read/writer permissions assigned. If such an attempt is made, Windows security diverts your data to a copy of the data file or report and associates the copy with your user profile, thereby possibly compromising the integrity of your application. To prevent this, Sage 300 Construction and Real Estate applications present you with an error message if you try to save a file to such a location.

Section 2: Frequently Asked Questions

Overview

This section covers frequently asked questions concerning Residential Management. For more information on installing or upgrading Residential Management, refer to the *Residential Management Installation Guide*. This and other guides are available on the [Product Documents website](#).

What if no servers are listed in the Select Server window when I start Residential Management?

SQL Services are running on the local workstation

When you install Residential Management in a Local Area Network (LAN) environment, you must also install SQL Services (SQL Server 2005 or SQL Server 2005 Express) and Residential Management on the local workstations. To connect to the server's SQL service, the service must not be running on the workstation.

Verify that SQL Services on the workstation are stopped:

1 On the workstation, select [**Start**] > **All Programs > Microsoft SQL Server 2005 > Configuration Tools > SQL Server Service Manager**.

2 In the SQL Server Service Manager window, select **SQL Server 2005 Services > SQL Server (SAGECRE)**.

3 Right-click **SQL Server (SAGECRE)** and select **Stop**.

4 Close the **SQL Server Service Manager** window.

A port is blocked by the firewall

By default, ports 1433 and 1434 are reserved for SQL Services. If either of these two ports is blocked, the SQL Services (SQL Server 2005 or SQL Server 2005 Express) on the workstation cannot communicate with SQL Services on the server. If you manually assigned different ports for SQL Services, verify that those ports are not blocked or being used by a different service.

Verify that the workstation is communicating with the server:

1 Ping the server from the workstation:

    a From the Windows **Start** menu, select **Run**.

    b In the **Open** box, type cmd.

    c Click [**OK**].

    d At the command prompt, type ping and the name of the server you want to communicate with. Leave a space between the word ping and the computer name.

    e Press ENTER.

A successful ping returns a set of four reply packets with the IP address. An unsuccessful ping will return a note that the host is unknown, or will hang followed by a message that the connection timed out.

2 If the workstation is communicating successfully with the server, the server IP address is returned. For example, the IP address might be 172.72.242.50.

3 If the test fails, the server is not configured correctly to allow workstations to communicate with it. Contact your systems administrator.

For more information about how to use static and dynamic port allocation with SQL Server, refer to articles 823938, 287932, and 293107 in Microsoft's Knowledge Base.

1 Open http://support.microsoft.com in your browser.

2 Search for the article number.

3 Follow the instructions in Microsoft's Knowledge Base article.

How do I end a Terminal Services session that has stopped responding?

Use Terminal Services Manager on the server to end sessions

NOTES:

- This solution includes information or procedures for a non-Sage 300 Construction and Real Estate product. Although we provide steps to solve the issue, we cannot guarantee them. Please refer to the documentation you received with the software or technical support for the product for detailed instructions.

- Contact your system administrator if you are not comfortable following the steps below.

If your Terminal Services session stops responding, end the session as follows:

1 On the server where Terminal Services is installed, click [**Start**] and then click **Settings > Control Panel**.

2 Select **AdministrativeTools**.

3 Select **TerminalServicesManager**.

4 Right-click the operator whose session stopped responding, and select **Disconnect**.

NOTE: This is equivalent to ending a task using CTRL+ALT+DEL.

Section 3: Prerequisite Software

Residential Management needs to have the following third-party components installed at the beginning of the Residential Management installation.

Microsoft SQL Server 2005 Express

Microsoft SQL Server 2005 Express provides access to Residential Management databases. This version is available in the Residential Management installation files.

Section 4: Compatibility Testing

The following tables list the software that Sage 300 Construction and Real Estate's quality assurance department tests with Sage 300 Construction and Real Estate.

For more information about Sage 300 Construction and Real Estate requirements, see the *Sage 300 Construction and Real Estate User's Guide.* This and other guides are available on the Product Documents website.

Servers

We test Windows 2008 Server Standard and Enterprise Edition and Windows 2008 Server R2 Standard and Enterprise Edition with Sage 300 Construction and Real Estate.

Microsoft Windows Server 2003 R2 has been tested for compatibility with Residential Management and we are able to support its use.

Operating System	Service Pack	Other
Windows 2008 Server R2 Standard Edition and Enterprise Edition		
Windows 2008 Server (with and without Terminal Services. For Standard, with Terminal Services and Citrix)	Service Pack 2	
Peer to Peer		

In addition, we test Palm OS versions 3.x, 4.0, and 4.1 with Accounting and Management Products.

CAUTION: Residential Management is not currently supported on computers with the Windows 8, Windows 8.1, Windows Server 2012, or Windows Server 2012 R2 operating system.

Workstations

We support workstation, stand-alone, and peer-to-peer operating systems.

Operating Systems	Service Pack	Other
Windows 7 Professional, Ultimate, and Enterprise	Service Pack 1	
Windows Vista Business and Ultimate	Service Pack 2	Microsoft DirectX 9.0, Microsoft Windows Installer 3.1

Other Software

We test the following additional software with Sage 300 Construction and Real Estate.

Other	Service Pack or Update
Crystal Reports®	As installed from Sage 300 Construction and Real Estate installation files
Internet Explorer 6.0	Service Pack 1
Microsoft .NET Framework 2.0	As installed from Sage 300 Construction and Real Estate installation files
Microsoft Data Access Components (MDAC) 2.7	As installed from Sage 300 Construction and Real Estate installation files
Microsoft Office 2002, and 2003	For Office 2003, Service Pack 2
Symantec® Winfax 10.03	
UniMessage Pro 1.0	
SQL Server 2005 Express and SQL Server 2005	For SQL Server 2005, Service Pack 2

Section 5: Migrating Residential Management

Microsoft Installer and Residential Management

Moving Residential Management to a New Server Location

⚠ **CAUTION:** Incorrectly moving Residential Management databases may severely damage your system. Sage Software is not responsible for damage to your data caused by incorrectly moving your Sage 300 Construction and Real Estate data folders or Residential Management databases. Before making changes to your Sage 300 Construction and Real Estate or Residential Management data, contact your system administrator for assistance and make a backup copy of all valued data.

The default location for the Residential Management database is the SQL directory. For example, C:\MSSQL\Data. You can create a new data directory using Windows Explorer and use the Database Installer in your Residential Management installation files to detach and reattach the database to your SQL server.

📋 **NOTE:** If you are moving the data to a different server, see <u>"Moving Residential Management data to a New Host or Server" on page 11</u>

Follow these steps to move your Residential Management database to a different location on your server:

1 Have all operators exit Residential Management.

2 Back up your database files. For example, if your database is called SunriseProp, make a backup of the SunriseProp.mdf and SunriseProp_log.ldf files.

3 Use Windows Explorer to create a new data directory. For example, F:\RMData\Data (F:\ represents the drive on your server).

4 Use the Database Installer to detach your database:

    a In the folder where your RM installation files are stored, browse to and double-click **RMDatabase.exe** (\RM Database\RMDatabase.exe) to open the **RM Data Installation** window.

    b In the **RM Data Installation** window, type your **Database Name** in the box. For example, SunriseProp.

    c Click [**Detach**] to detach your database.

    d In the **DatabaseInstaller** window, click [**OK**] to detach the database.

    e In the **Login Information** window, in the **Login** field, type your SQL login ID and password, and click [**Accept**]. A password is required only if you set one up for this login ID.

    f After the detach is complete, click [**OK**]. Minimize the **RM Data Installation** window.

5 Use Windows Explorer to cut and paste your SunriseProp.mdf and SunriseProp_log.ldf files from C:\MSSQL\Data to F:\RMData\Data (F:\ represents the drive on your server).

6 Maximize the **RM Data Installation** window to attach your database:

   a From the **Data Drive** list, select the F drive.

   b Type the new directory in the **Data Directory** box. For example, if your new directory is F:\RMData\Data, type \RMData.

   c Click [**Attach**].

   d In the **DatabaseInstaller** window, click [**OK**].

   e In the **Login Information** window in the **Login** field, type your SQL login ID and password and click [**Accept**].

   f After the attach is complete, click [**OK**] and then click [**Exit**].

7 You should now be able to use Residential Management.

Moving Residential Management data to a New Host or Server

When you move Residential Management to a new server, you must move the Sage 300 Construction and Real Estate program folder and data folders. You will need the Accounting and Management Products installation files that you are using currently to install components, such as the Pervasive database engine, at the new server. Do not install a newer version of Accounting and Management Products until after you have moved and tested Sage 300 Construction and Real Estate at the new server.

1 Verify that no operators are using Residential Management on the old server.

2 On the new server:

   a Install the same version of Residential Management that is currently installed on the old server.

   b Download or copy the new Residential Management installation files to the new server in accordance with the instructions provided in the download software notice.

   c In the resulting RM installation folder, browse to and double-click RMDatabase.exe (\RM Database\RMDatabase.exe) to open the **RM Data Installation** window.

   d In the **RM Data Installation** window, click [**Create**] to create the RM Demo database as usual and prepare the database engine for your data from the old server.

3 On the old server:

   a Click [**Start**] and select **Settings > Control Panel > Administrative Tools > Services**.

   b Right-click **MSSQL** or **MSSQLServer** and select **Stop**.

   c Using Windows Explorer, browse to your SQL data directory (for example, C:\MSSQL\Data) and copy the .mdf and .ldf files associated with your Residential Management database to the SQL data directory on the new server. For example, if your database is called SunriseProp, copy SunriseProp.mdf and SunriseProp_log.ldf to the new server.

   d Close the **Services** window.

4 On the new server:

a Click [**Start**] and select **Run**.

b Click [**Browse**]. Browse to your RM installation folder and double-click **RMDatabase.exe** (\RM Database\RMDatabase.exe) then click [**Open**].

c In the **RM Data Installation** window, type your **DatabaseName** in the box. For example, if your .mdf file is called SunriseProp.mdf, your database name is SunriseProp.

d Click [**Attach**] to attach your database as usual.

e Click [**Exit**] to close the **RM Data Installation** window.

f You should now be able to start Residential Management. Select the **SQL Server** (usually **(local)**), and select your database.

You may need to run ResetRegistry.vbs (located in your RM folder) to view the new server so that you can select it.

NOTE: If you have any custom Residential Management reports, copy them from the old server to the same location on the new server. If you have not done so already, run the Upgrade Crystal Reports tool, as described in the *Residential Management Release Notes*.

Section 6: Support and Assistance

Supporting documentation

In addition to reading this document, read the following supporting documentation before you install:

- The *Sage Residential Management Release Notes* contains information about new features, fixes, and known issues.
- The *Sage Residential Management Installation Guide* contains installation instructions and system requirements.
- The *Installation Checklist* contains a brief description of the steps involved in upgrading your software.

You can access a complete library of supported product documents.

Online help

Each Sage 300 Construction and Real Estate application includes online help, which provides information about procedures as well as items in the windows.

To access the help in the software:

- In a window, click the [**Help**] button, click 🔵 (the help icon button), or press F1 to display the help topic for that window.
- In an application, select **Help > Help Topics**.
- In the Desktop, select **Help > Application Help**, and then choose the desired application.

To aid you in finding information, the online help for each application includes the following tabs:

- **Contents** tab with an outline of the help with links to the help topics.
- **Index** tab with keywords that link to help topics related to that keyword.
- **Search** tab, where you can type text and click [**Search**] to locate that text in the help topics.

We would like your feedback about the online help so we can make improvements. The bottom of each help topic contains an area where you can indicate whether the topic was helpful and provide additional comments. To protect your privacy, all comments are anonymous.

Training

Sage University offers live and recorded online training sessions to help you get the most out of your software. To access Sage University, either:

- From an application, select **Help > Web Resources > Sage University**.
- From Desktop, select **Tasks > Sage 300 Construction and Real Estate > Web Resources > Sage University**.
- From your browser, visit http://www.sagesoftwareuniversity.com/.

Contact your business partner for local training.

Technical assistance

When you need assistance, refer to the [How do I get technical support for Sage 300 Construction and Real Estate?](#) article to determine which service works best for you.