Sage Estimating

(formerly Sage Timberline Estimating)

Installation and Administration Guide

Version 14.12

This version of the software has been retired

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Chapter 1—Release Overview

Sage welcomes you to Sage Estimating. Read this guide carefully to understand the installation and configuration process.

Configuration Features in Sage Estimating

You will find the following configuration features in Sage Estimating:

- **Estimating Management Console.** The Estimating Management Console allows you to view and manage your databases, estimates, and roles and permissions. You can also use the Estimating Management Console to perform data migrations, share estimate layouts, view and manage estimates, and set up custom estimate reports.
- **Configuration wizard.** The Configuration wizard lets you designate a SQL Server instance to act as your Sage Estimating server. Using the Configuration wizard, you can also create the estimate database, upgrade existing data, and set up your software licensing and registration. For more information, see “D. Run the Configuration Wizard” on page 18.

Read the Supporting Documentation Before You Install

Be sure to read supporting documentation before you install:

- This *Installation and Administration Guide* includes an overview of this release, installation instructions, system requirements, and contact information.
- The *Release Notes* provide details about new features, database changes, known issues, and fixes. This document is available in your Sage Estimating installation files in the **Documents** folder.
- The *Getting Started Guide* provides an operational overview of the Sage Estimating software. This document is available in your Sage Estimating installation files in the **Documents** folder.
- The *SQL Server Guide* gives you an overview of the significant differences between the new SQL Server databases and the Pervasive databases used in previous Sage Estimating releases. This document is available on your Sage Estimating installation files in the **Documents** folder.
- The *Options Guide* provides installation, setup, and operating instructions for each of the available Sage Estimating options, such as the OnScreen Takeoff Integrator or License Manager. This document is available in your Sage Estimating installation files in the **Documents** folder.

Conventions Used in this Document

This document uses the following conventions:

- Information you type into the software is shown in bold font. For example: Type **Miscellaneous** in the box.
- The names of screens, windows, fields, and other features displayed by the software are shown in **bold font**.
- The names of buttons you can click are enclosed in brackets with bold font. For example: [**OK**] or [**Post**].

- Names of keys are shown in capital letters. For example: ENTER or TAB. A plus sign (+) between two key names indicates you should press the keys simultaneously.
- Variable names or names that are specific to your installation may appear in italics and brackets. For example: [*Drive*]\\[*Server*].

Symbols

NOTE: This symbol is used when presenting information that is supplemental to the adjacent text.

TIP: This symbol is used when presenting helpful information for using the software.

CAUTION: This symbol is used when presenting important information to help you avoid a loss of critical data.

IMPORTANT: This symbol is used when presenting information that is critical to understand or that requires you to take action.

Menu Paths

In this document, menu paths show you the steps required to start a task. Menu paths appear in bold font with angle brackets around buttons. For example:

"If the program does not automatically start, click [**Start**] > **Run**."

Online Help

The Sage Estimating software includes online Help, which provides answers to your questions about procedures as well as items in the windows.

To access the online Help in the Sage Estimating software, click the Help button or icon, or press [F1] to display the help topic for that window.

To aid you in finding the information you need, the online Help for each module includes the following panes:

- **Contents** pane containing links to the help topics
- **Index** pane containing keywords that link to help topics related to that keyword
- **Search** pane, where you can type text and click [**Search**] to locate that text in the help topics

For more information about using the online Help, see the Sage Estimating Help.

We would like your feedback about the online Help so we can make improvements. 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 online and classroom training sessions to help you get the most out of your Sage Estimating software. To access Sage University, visit www.sageu.com.

You can also get access to Sage University from the File menu by selecting **Help** > **Sage Estimating on the Web** > **Sage University**.

Technical Assistance

When you need assistance, refer to the Knowledgebase article How do I get technical support for Sage Estimating? to determine which service works best for you.

Submitting Enhancement Requests

We want to hear your suggestions for improving the software. To send us your comments, click on the File menu button and select **Help** > **Sage Estimating on the Web** > **Submit Enhancement Requests**.

Chapter 2—System Requirements

The following hardware and software requirements provide a guideline. As with any software, as we continue to enhance Sage Estimating, you will realize optimal system performance by using up-to-date computer hardware. This includes memory as well as overall hardware specifications. For help in selecting the right business-class computers for your business-class software, contact your authorized business partner.

Sage Estimating supports the following and service packs. The listed service packs are minimum required levels for installing Sage Estimating.

Table 1: Supported Operating Systems

Operating System	Minimum Service Pack
Windows 8.1 Pro	
Windows 8.1 Enterprise	
Windows 8 Pro	
Windows 8 Enterprise	
Windows 7 Business	SP1
Windows 7 Professional	SP1
Windows 2008 Server Enterprise Edition	SP2
Windows 2008 Server Standard Edition	SP2
Windows Server 2012 Standard Edition	
Windows Vista® Business	SP2
Windows Vista® Ultimate	SP2

NOTE: Sage Estimating also supports all 64-bit versions of these operating systems.

Supported Editions of SQL Server and Other Applications

Table 2: Compatible Third-Party Applications

Sage Estimating is tested for use with the following applications:

Interfacing Applications in the Sage Estimating installation files	Interfacing Applications Not in the Sage Estimating installation files
Sentinel Driver—7.6.1	On-Screen Takeoff—3.8 and 3.9
License Manager—8.3.0	
Microsoft SQL Server 2008 R2 Express	

NOTE: You can install an approved instance of SQL Server side by side on a computer where SQL Server 2012 is also installed. Be aware that installing Sage Estimating may then result in an "Install completed with errors" message; however, the resulting Sage Estimating install operates correctly.

Recommended Minimum Processor

A Pentium 4 (P4) or later processor with a minimum of 2 gigahertz (GHz) processing speed is required for the server that hosts Sage Estimating as well as workstations using Sage Estimating. Having a fast processor on both the server and workstations will improve your performance.

Recommended Minimum Random Access Memory (RAM)

A minimum of 2 gigabytes (GB) of available, ***open*** RAM is required for the server that hosts Sage Estimating and for the workstations using Sage Estimating. As a general rule, the more RAM you have on the server and workstations, the better your performance will be.

Open RAM is unallocated random access memory that is available for Sage Estimating use.

Hard Disk Space Required for Installation

The following table lists the hard disk space necessary to install Sage Estimating on a server, stand-alone computer, or workstation. Use this information to calculate your hard disk space requirements based on the applications that you install. Having adequate free space on the hard disk, a fast processing speed, and adequate RAM can improve your performance.

IMPORTANT: Do not install Sage Estimating until you have sufficient hard disk space available.

Table 3: Hard Disk Space Usage

Product	Available Hard Disk Space
Sage Estimating and SQL Server 2008 R2 Express	Up to 3 GB
Sage Estimating only	Up to 1.2 GB

Hardware Requirements

Sage Estimating requires the following hardware.

Table 4: Hardware Requirements

Hardware	Purpose and Specifications
DVD drive	For Sage Estimating installation DVDs.
Network adapter	Connects computer to a network. Must be high quality.
Printer	For Sage Estimating.
Super VGA monitor	For high-resolution color display. 1280 pixels by 1024 pixels recommended.
SafeNet Sentinel SuperPro hardware key (dongle)	For Sage Estimating license management.

Supported Protocols

Table 5: Supported Protocols

Protocol	Purpose
Transmission Control Protocol/Internet Protocol (TCP/IP)	Microsoft servers default to this protocol.
Remote Display Protocol (RDP) 5	Microsoft remote protocol, which is used in its remote connection applications.
Independent Computing Architecture (ICA)	Citrix remote protocol, which is used in its remote connection application.

Access Rights

The following sections describe the access rights you need to successfully install and use Sage Estimating.

Elevate Permissions

You must elevate your permissions before installing Sage Estimating on Windows Vista, Windows Server 2008, Windows 7, and Windows 8 or Windows 8.1. During certain installation tasks, you will receive another prompt to elevate your privileges. If you do not acknowledge each prompt within two minutes, the installation

process will quit the task. If this occurs, you may receive a separate prompt asking you to retry the task. To retry the task, click [**Retry**] and then elevate your privileges at the prompt.

SQL Server Permissions

Database permissions for SQL Server instances used with Sage Estimating are now set up using the **Security** feature in the Estimating Management Console.

For more information on setting up SQL Server security for Sage Estimating, see “F. Set Up Roles and Permissions” on page 20.

Full Control of Specific Files and Folders Required

To use Sage Estimating, you must have full control of the following files and folders on your file server, terminal server, and workstations that have Sage Estimating installed. Make sure that your system administrator also gives you full control of all the subfolders and files.

CAUTION: Incorrectly modifying Microsoft Windows security may severely affect your system operations. Sage 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.

NOTE: Some of these folders may be hidden. To view them on Windows Vista, Windows 2008 Server, and Windows 7, open Windows Explorer, select **Organize** > **Folder and Search Options**, and then select **Show hidden files and folders** on the **View** tab. In Windows 8 or Windows 8.1, open Windows Explorer, click on the **View** tab, and then select the **Hidden items** check box in the **Show/hide** group.

Table 6: Folders and Files Requiring Operator Control

Product	Operating Systems	Required Folders and Files	Location and Specifications
Sage Estimating	32-bit Windows systems	*[Drive]*:\Program Files \Sage Estimating	This folder is located on the file server, terminal server, and workstations where you installed Sage Estimating. It is the default installation location for Sage Estimating. However, depending on your system configuration, your company may have renamed this folder or installed it to a different location.
Sage Estimating	64-bit Windows systems	*[Drive]*:\Program Files (x86)\Sage Estimating	This folder is located on the file server, terminal server, and workstations where you installed

Product	Operating Systems	Required Folders and Files	Location and Specifications
			Sage Estimating. It is the default installation location for Sage Estimating. However, depending on your system configuration, your company may have renamed this folder or installed it to a different location.
Sage Estimating	Windows Vista®, Windows 2008 Server, Windows 7, Windows 8, and Windows 8.1	*[Drive]* :\Users\Public\Sage Estimating **-and-** *[Drive]* :\ProgramData\Sage Estimating	These folders are located on the workstation or terminal server where you use Sage Estimating. Sage Estimating installs necessary files to these folders and requires that the user has full control of them.

Full Control and Read Access to Specific Registry Keys Required

To use Sage Estimating, you must have full control of the following Windows registry key on your file server, terminal server, and workstations that have Sage Estimating installed. Make sure that your system administrator also gives you full control of all subkeys.

CAUTION: Incorrectly editing the Microsoft Windows registry may severely damage your system. Sage is not responsible for damage to your system caused by editing the registry. Before making changes to the registry, contact your system administrator for assistance and make a backup copy of all valued data. System administrators, see Microsoft Registry Editor Help topics for detailed instructions.

- HKEY_CURRENT_USER

You should also have read access to the following registry keys and associated subkeys:

- HKEY_Local_Machine\Software\ODBC
- HKEY_Local_Machine\Software\Wow6432Node\Sage

Supported Upgrade Paths

If you plan to use your estimate data from a release earlier than version 11.1, you must upgrade your data to Sage Estimating 9.6 or later prior to migrating your data. Refer to “Chapter 4—Data Migration” on page 27 for data migration instructions.

NOTE: Do not install previous releases of Sage 300 Construction and Real Estate (formerly Sage Timberline Office) after installing Sage Estimating 14.12. The new Sentinel driver is incompatible with previous releases.

You can upgrade any Windows-based Sage Estimating data (beginning with Sage Estimating 1.0) to Sage Estimating 9.6.

If desired, you can install this version of Sage Estimating without uninstalling your previous Sage Estimating installation. However, because the data format is different, you cannot migrate data between this release and releases of Sage Estimating earlier than version 11.1 without performing data migration.

Chapter 3—Installation and Configuration

Installation and Configuration Categories

Installation and configuration of Sage Estimating falls into one of three primary scenarios.

- Scenario 1: Set up in a server/workstation domain
- Scenario 2: Set up in a workgroup environment
- Scenario 3: Set up on a standalone computer

Use the following diagrams to plan the installation and configuration process for your setup scenario.

Figure 1: Scenario 1 (Domain server/workstation environment, databases installed on the server)

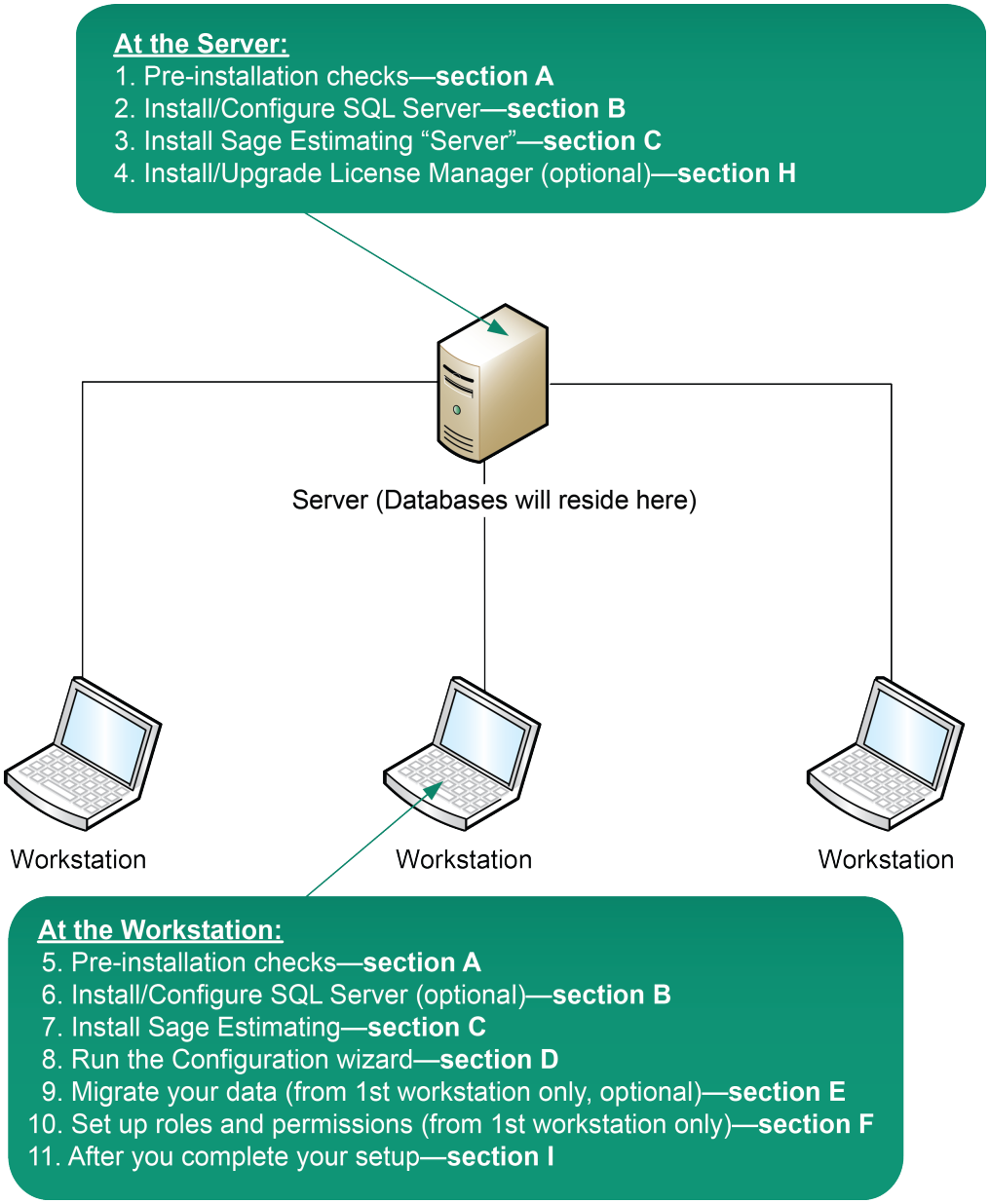


Figure 2: Scenario 2 (Workgroup environment, estimating data shared from one workstation)

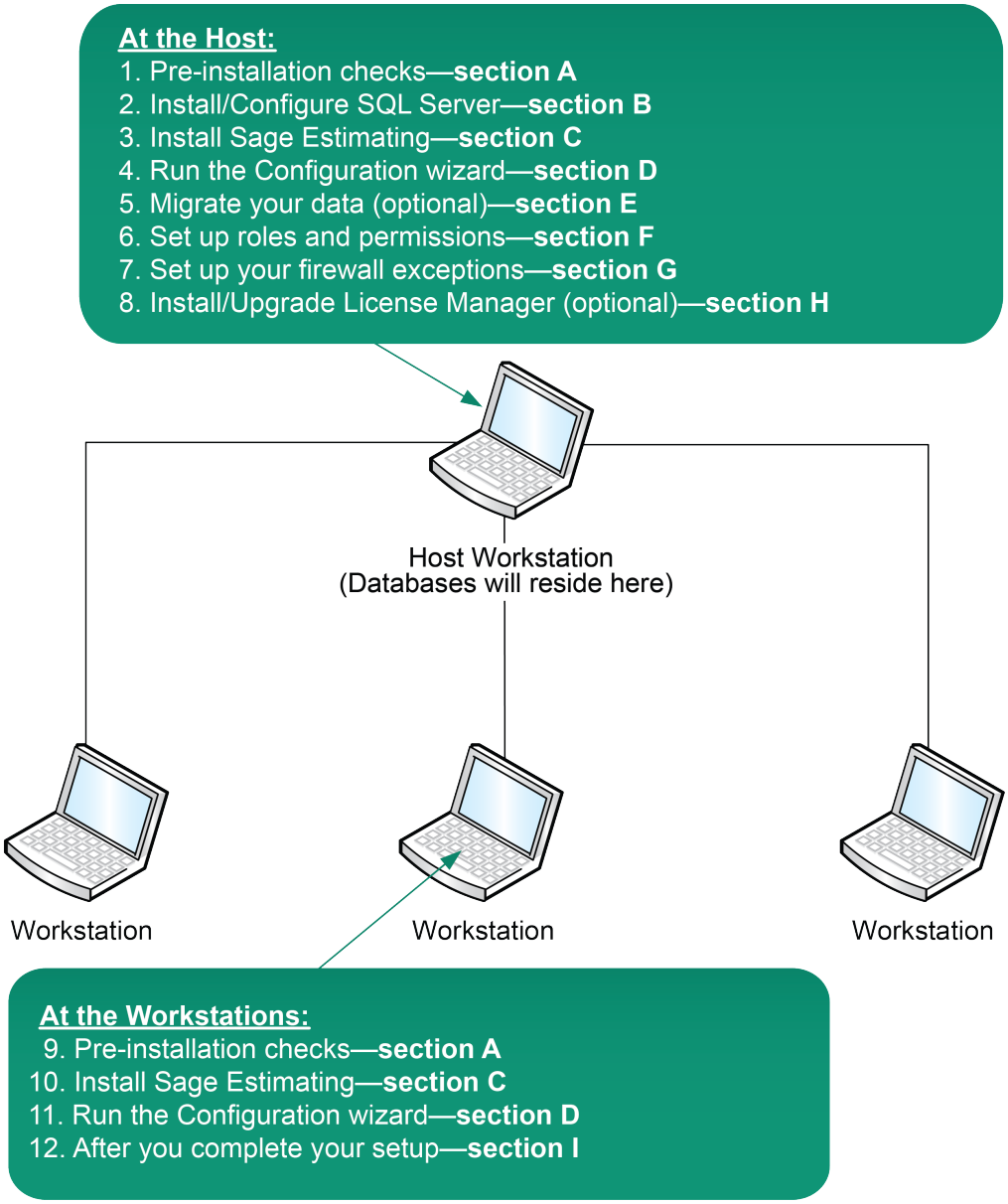
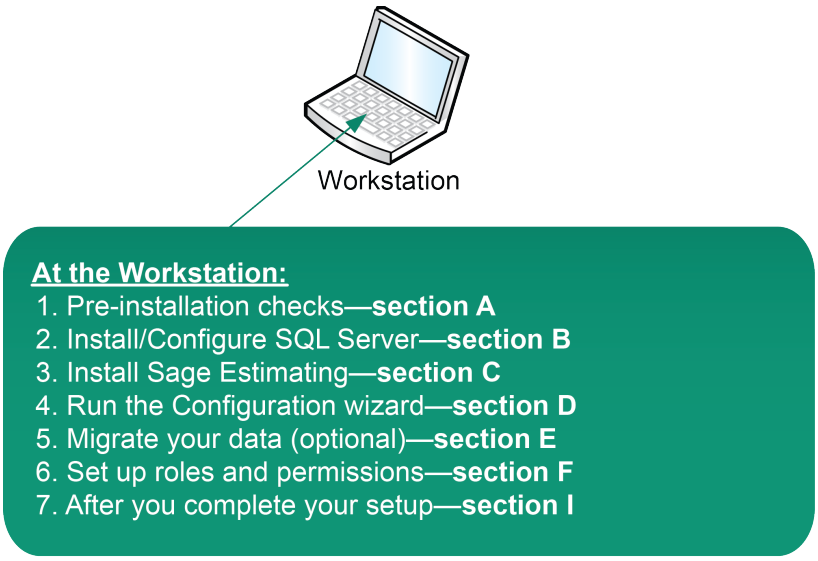


Figure 3: Scenario 3 (Standalone workstation environment, estimating data stored on the workstation)



A. Before You Install or Upgrade

Ensure you read through and understand the information in this installation guide.

1. If you are currently using a previously-released version of Sage Estimating, create a complete backup copy of all Sage Estimating data and program files before installing this release.
2. Install the appropriate operating system service pack level, make sure that there is sufficient hard disk space available, and ensure that your server and workstations meet all other hardware and software requirements. See “Chapter 2—System Requirements” on page 5 for more information.
3. Make sure that you have full control of the necessary folders, files, and registry keys on your file server, terminal server, and workstations that will have Sage Estimating installed. For a list of the required folders, files, and registry keys for your operating system, see “Chapter 2—System Requirements” on page 5.
4. Close all programs and services for the duration of the installation. This includes programs that may be running in the background such as antivirus, email, and backup programs.
5. If you do not have Sentinel protection devices attached to your computer, do not attach these devices until after you install Sage Estimating. If you already have Sentinel protection devices attached, you can leave these devices in place during the Sage Estimating installation.
6. Decide which installation scenario to follow. See “Installation and Configuration Categories” in the previous section.
7. You must have the appropriate permissions to perform certain tasks described in this chapter. Contact your Sage Estimating administrator if you require additional permissions.

B. Install/Configure SQL Server

Install or configure a supported version of SQL Server (SQL Server 2008 SP1, SQL Server 2008 R2, SQL Server 2008 R2 Express, or SQL Server 2012 for Sage Estimating version 13.2 and later) on the server or workstation where you want to store your Sage Estimating data. An optional copy of SQL Server 2008 R2 Express is included with the Sage Estimating installation.

- If you want to use an existing installation of SQL Server 2008 or SQL Server 2008 R2, refer to “Chapter 5—Configuring SQL Server,” on page 31 for settings for creating and configuring a new instance.
- If you do not already have an installation of Microsoft® SQL Server® on the server or workstation where you plan to keep your Sage Estimating databases, and you want to install the SQL Server 2008 R2 Express copy that comes with Sage Estimating, follow the instructions for installing Sage Estimating found in “C. Install Sage Estimating” on page 16 and select one of the following options during the install:
  - **Complete Sage Estimating System**
  - **Sage Estimating Server and new instance** (available only on new installations)
  - **Create new local SQL Server instance** (available only when reinstalling)

  If you are operating in a workstation/server environment (see “Installation and Configuration Categories” on page 11), you do not need to install SQL Server on the workstations. However, you can install SQL Server optionally if you want to maintain a local copy of your estimating data.

NOTES:

- At the instance name prompt, type a name for the new SQL Server instance (database server) in the box, and then click [**OK**].

  The default instance name is **SAGE_ESTIMATING** , but you can give the instance any name you want provided you do not give it the same name as any existing SQL Server instance on the computer.
- If you plan to migrate existing data from Pervasive-based Sage Estimating (versions 9.6 up to 13.1) to version 14.12, you must install SQL Server on the destination computer or server.
- The installation process may reboot your computer. If your computer reboots, log back onto your computer at the prompt.
- You can install an approved instance of SQL Server side by side on a computer where SQL Server 2012 is also installed. Be aware that installing Sage Estimating may then result in an "Install completed with errors" message; however, the resulting Sage Estimating install operates correctly.
- Sage recommends *against* installing SQL Server 2008 R2 Express on a domain controller.

C. Install Sage Estimating

IMPORTANT:

- Do not install Sage Estimating until you have sufficient hard disk space available. See "Hard Disk Space Required for Installation" on page 6 for more information.
- Do not install previous releases of Sage 300 Construction and Real Estate after installing Sage Estimating; the new Sentinel drive is incompatible with previous releases.

1 At the workstation or server, log on with full administrative rights.

Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives). If you are unsure whether you have full administrative rights, ask your network administrator for assistance.

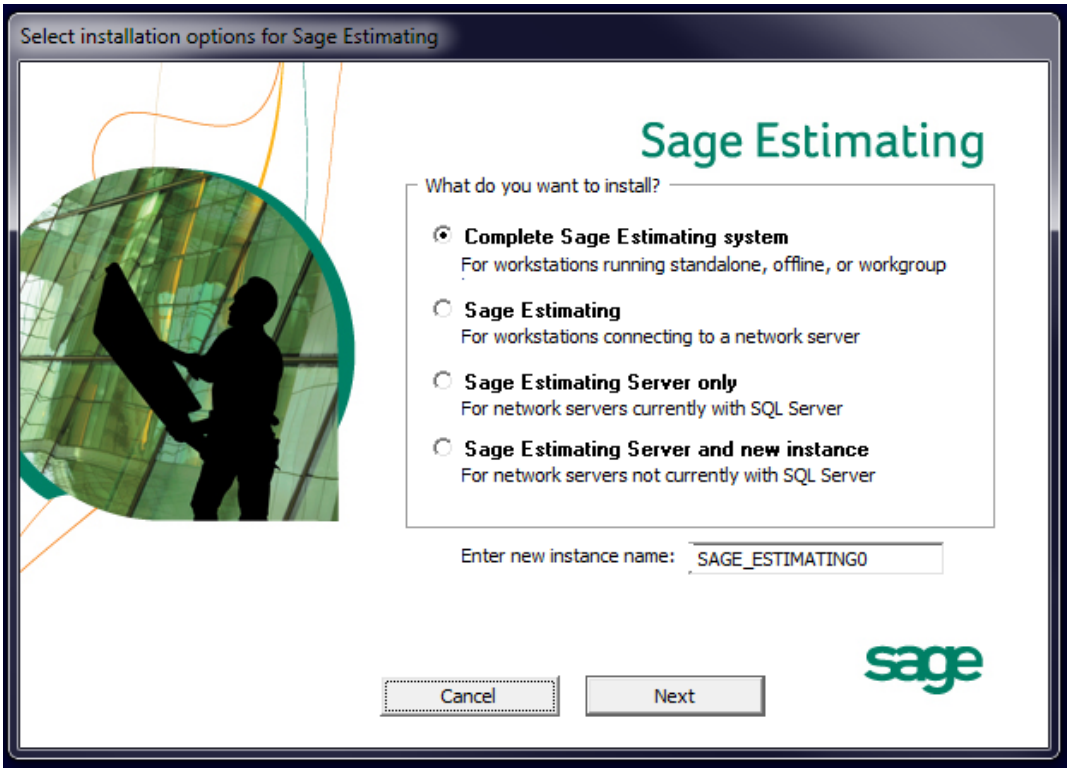
2 Open the Sage Estimating installation window by double-clicking the **SetMeUp.exe** file found in your local Sage Estimating install folder.

The Sage Estimating install folder is found in the location you specify during the Sage Estimating download process. For example, if you download the install files to C:\Users\Public\Public Documents\Sage Estimating, look in this folder for the **SetMeUp.exe** file.

NOTE: If you have not already done so, download the Sage Estimating install files in accordance with the instructions provided in the software notice. If you are installing Sage Estimating on a server, ensure you save the install files in a location that all workstations can access. Then copy the install files to each workstation where you want to install Sage Estimating.

Clicking **SetMeUp.exe** opens the Sage Estimating installation window.

The Sage Estimating installation window



3 Follow the steps as prompted during the resulting installation and choose from one of the following installation selections (refer to installation scenario 1, 2, and 3 on “Installation and Configuration Categories” on page 11.

- **Complete Sage Estimating system.** This option installs everything you need to operate Sage Estimating on your local workgroup server, offline workstation, or standalone computer, including a new instance of SQL Server 2008 R2 Express. Select this option if you are installing Sage Estimating on a stand-alone workstation or a workgroup server.
- **Sage Estimating.** Select this option if you are installing Sage Estimating on a workstation that will connect to a server on a domain or in a workgroup. Selecting this option installs the Sage Estimating software and support components but does not install a new instance of SQL Server 2008 R2 Express.
- **Sage Estimating Server only.** Select this option if you are installing Sage Estimating to a server on a domain and you want to use an existing SQL Server install on the server. Selecting this option installs certain Sage Estimating components that allow you to configure the server to support Sage Estimating but does not install SQL Server 2008 R2 Express or Sage Estimating.

NOTE: You must install this option on the same server where your SQL Server instance is installed and the existing SQL Server instance must meet the minimum supported requirements. For more information, see “Supported Editions of SQL Server and Other Applications” on page 5.

- **Sage Estimating Server and a new instance.** Select this option if you are installing to a server on a domain and you want to use the SQL Server 2008 R2 Express copy that comes with the Sage Estimating install. Selecting this option automatically installs and configures a new instance of SQL Server 2008 R2 Express for you. This option is unavailable if you already have installed Sage Estimating components on the workstation or server.
- **Create new local SQL Server instance.** This option appears only if you have already installed Sage Estimating components on the workstation or server. Select this option to install and configure a new instance of SQL Server 2008 R2 Express.

The installation guides you through the process of installing Sage Estimating products and required support software.

NOTES:

- The installation process may reboot your computer during the installation. Ensure you close all programs and applications before starting the installation to avoid losing any data. If your computer reboots, log on to your computer again.
- If you choose to upgrade data from a previous version of Sage Estimating, the process may take up to four hours, depending on the size of your database. Plan accordingly.

4 Repeat steps 1–3 for each workstation or server where you want to install Sage Estimating.

D. Run the Configuration Wizard

The Configuration wizard installs automatically as part of the Sage Estimating installation.

1 Start the Configuration wizard by selecting **Start** > **All Programs** > **Sage** > **Estimating 14.12** > **Configuration Wizard** or by clicking the desktop icon.

For Windows 8 and Windows 8.1, select the **Configuration Wizard** icon from the Tile Desktop, or right-click outside the tile area, and then click **All apps** > **Sage** > **Configuration Wizard**.

NOTE: For Windows Vista®, Windows 2008 Server, Windows 7, Windows 8, and Windows 8.1, you may need to elevate your permissions level before starting the Configuration wizard by right clicking on **Configuration Wizard** (or the desktop icon) and selecting **Run as administrator**.

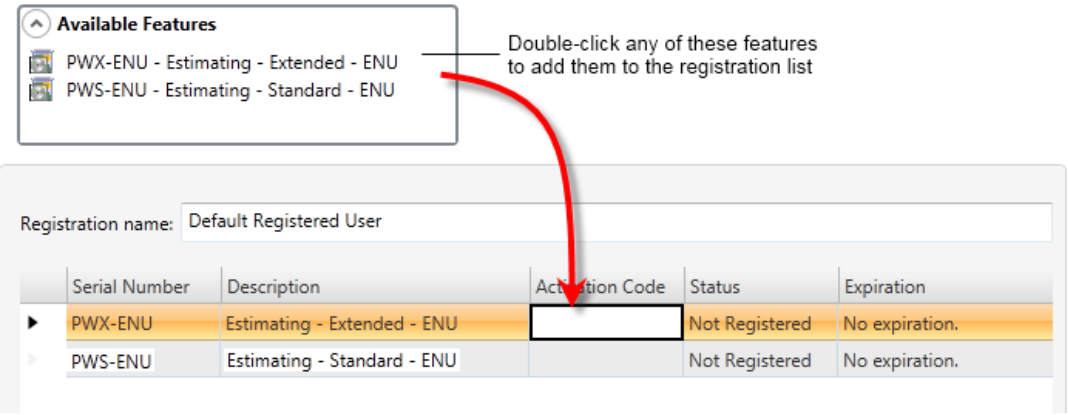
2 In the **Configuration Wizard** window, register your software if prompted as follows:

a Locate your product's registration name from the packing slip enclosed with the original shipment.

b Type the registration name in the **Registration name** box.

c Locate each product or feature in the **Available Features** list that you want to use (left-hand pane) and double-click on it to add it to the registration list (in the detail pane).

Figure 4: Selecting Features for Registration and Activation



d In the **Activation Code** box of the registration list, type the activation code from the original shipment's packing slip.

Alternatively, you can type one of the following selections in the **Activation Code** box for some of the product features:

- DEMO: Operates the software feature in demonstration mode.
- LM: Registers the software feature separately using License Manager.

See “H. Set Up License Manager (optional)” on page 22 for more information about setting up License Manager.

e Click [**Save**] to save your registration and activation selections.

3 Click **Server** in the left-hand pane of the Configuration wizard.

4 Select the SQL Server instance ("server") that you are using for your Sage Estimating server by clicking [**Select**].

5 Follow the on-screen prompts to finish configuring your Sage Estimating software.

The prompts you receive vary depending on your installation. You may be prompted to perform one or more of the following actions:

- If the Configuration wizard does not find a preexisting estimate database in the specified SQL Server instance, it prompts you to create one. Type a name for the new estimate database at the prompt.
- If you are storing existing Sage Estimating data from a previous release (version 11.1 or later) on the selected instance, the Estimating Management Console identifies the data for upgrade. Click [**Upgrade**] then follow the prompts to upgrade your data.

6 Click [**Close**] to exit the Configuration wizard.

E. Migrate Your Data (optional)

If you have existing estimate data from a release prior to version 11.1, you can migrate your data to the current Sage Estimating version. You can perform this process from any computer that has access to the SQL Server instance or instances where you plan to store your estimate data. See “Chapter 4—Data Migration” on page 27 for instructions.

F. Set Up Roles and Permissions

Set up roles and permissions from a workstation where Sage Estimating is installed. If you are setting up Sage Estimating in a workstation/server or workgroup environment, you need to perform the roles and permissions setup from only one computer.

NOTE: You must be a Sage Estimating administrator to set up roles and permissions. The person who installs Sage Estimating is set up automatically as a Sage Estimating administrator.

Setting up roles and permissions involves three general steps:

- Create roles and assign permissions to them.
- Set up a list of authorized Sage Estimating operators.
- Assign operators to roles.

Set up a list of operators and task/feature permissions using the **Security** feature in the Estimating Management Console.

Create roles and assign permissions to them

1. Start the Estimating Management Console by selecting **Start** > **Programs** > **Sage** > **Estimating 14.1** > **Estimating Management Console** or by clicking on the desktop icon.

   For Windows 8, select the **Estimating Management Console** icon from the Tile Desktop, or right-click outside the tile area, and then click **All apps** > **Sage** > **Estimating Management Console**.

2. At the top of the Estimating Management Console, click [**Security**].

3. From the **Security** window of the Estimating Management Console, click on the **Roles** tab.

4. Click [**Add**] to open the **Add Role** window.

5. In the **Add Role** window, type a name for the new role in the **Name** box and an extended description in the **Description** box.

   Use the extended description to provide helpful identification information later, such as the purpose of the role.

6 Select the check box next to one or more tasks in the features list to provide operators and groups assigned to the role with access to the tasks.

   For example, selecting a check box labeled **Create Estimate** gives operators and groups within the role the ability to create new estimates.

7 Clear the check box next to a task to prevent operators and groups in the role from accessing it.

Set up an operator list

1 In the Estimating Management Console, click [**Security**] to open the **Security** window (if it is not already open) then click on the **Users** tab.

2 On the **Users** tab, click [**Add**] (located to the right of the **Users** grid) to open the **Add User** window.

3 In the **Add User** window, click [**Select**] to create a list of all operator user ID's and group ID's on the network to which Sage Estimating is connected.

   Alternatively, if you already know the user or group ID you want to add, you can type it directly in the **User Id** box or type the first few letters and click [**Select**].

4 Select a network user ID or group ID from the resulting list.

   NOTE: If you select a group ID, Sage Estimating adds all operators associated with the group.

5 Click [**OK**] in the **Add User** window.

The operator or operators associated with the selected user or group ID appear in the **Users** grid of the **Users** tab.

Assign an operator to a role

1 From the **Security** window, click on the **Users** tab.

2 Select an operator from the list in the **Users** grid.

3 Click on a role in the **Roles** list to assign the selected operator to it.

4 Repeat steps 1-3 for each operator you want to set up in Sage Estimating.

The **Features** list displays the corresponding tasks to which a selected role has permissions. You can assign an operator to more than one role and the **Features** list displays the cumulative task and feature permissions.

IMPORTANT: At least one operator must be assigned to the administrator role at all times. Attempts to remove the last operator from the role result in an error message.

G. Set Up Firewall Exceptions

If you are installing Sage Estimating on a workgroup server, you must set certain firewall exceptions to allow workstations to communicate with the Sage Estimating SQL Server instance.

For instructions on setting firewall exceptions, see "Setting the Firewall for Workgroups" on page 34.

H. Set Up License Manager (optional)

If desired, you can install License Manager to track and manage your Sage Estimating network licenses. License Manager uses a server protection device and network licenses to track application uses on the network.

Use the instructions in this section to install License Manager.

Guidelines

Please note the following:

- All license-managed servers and workstations must use the same network protocol (TCP/IP).
- You cannot install License Manager to a terminal server. If you have a terminal server, install to a workstation.
- If you use firewall software on your license server, you may not be able to use the WlmAdmin or WCommute applications to view or check out licenses. To resolve this issue, discuss the server's firewall security with your network administrator. If you are willing to adjust your firewall security settings on the license manager server, consider granting access to the **lservnt.exe** file.
- Check in any licenses before upgrading.

For more information about License Manager, see *Sentinel License Manager System Administrator Online Help* (index.html). This file is in the **\\AdditionalInstalls\LicenseManager\SysAdminHelp** folder in your Sage Estimating setup and installation files.

Install the Sentinel driver

The Sage Estimating installation program automatically installs a Sentinel driver if you do not have one. However, if you need instructions to install the Sentinel driver manually, visit www.sagecre.com and click [**Customer Support**]. After you have logged on, in the **Knowledgebase Search** box, type How do I install the Sentinel driver? See "Chapter 1—Release Overview" on page 1 for more information about using the Technical Support Knowledgebase.

IMPORTANT: Do not install previous releases of Sage 300 Construction and Real Estate after installing Sage Estimating; the new Sentinel driver is incompatible with previous releases.

Attach a protection device to the computer that will have License Manager

1 If you have a parallel port protection device, disconnect any hardware or peripheral devices attached to the parallel port.

2 Plug the protection device into the parallel port or USB port.

3 If you disconnected devices in step 1, reconnect these devices.

Install License Manager

If you already have License Manager installed, start with"Upgrade License Manager" on page 24.

1 Log on with full administrative rights. Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives).

If you are unsure whether you have full administrative rights, ask your network administrator for assistance. Alternately, you can ask your network administrator to log on with the network administrator ID before you start the installation.

2 Browse to your Sage Estimating installation and setup files and double-click **\\AdditionalInstalls\LicenseManager\Server\Setup\Setup.exe**.

3 Click [**Open**] then click [**OK**] to start the installation.

4 Follow the on-screen prompts. The installation automatically installs the appropriate software for the operating system.

NOTE: Be sure to accept the default installation path when you install License Manager. If you need to change the default installation path, change it to a local drive. You cannot install License Manager to a network drive.

Install license codes

The number of network licenses purchased for an application indicates the total number of concurrent network uses allowed for that application.

To install license codes:

1 Verify that the Sentinel License Manager service is running then select one of the following.

- **Windows Vista and Windows 2008 Server:** **Start** > **Control Panel** > **System and Maintenance** > **Administrative Tools** > **Services**.
- **Windows 7:** **Start** > **Control Panel** > **System and Security** > **Administrative Tools** > **Services**.
- **Windows 8 and Windows 8.1:** **Start** > **All apps** > **Windows System** > **Control Panel** > **System and Security** > **Administrative Tools** > **Services**.

2 Look for **Sentinel RMS License Manager** in the list of services.

3 At the License Manager server, click **Start**] > **All Programs** > **Accessories** > **Run** (Windows Vista, Windows 2008 Server, and Windows 7), or click **Start** > **All apps** > **Run** (Windows 8 and Windows 8.1).

4 In the **Run** window, browse to and double-click **\\AdditionalInstalls\License Manager\Admin.net\Win32\WlmAdmin.exe** in your Sage Estimating setup and installation files.

5 Install license codes using one of the following methods.

- **To enter license codes from a file:** In the **WlmAdmin** window, right-click your server and select **Add Feature** > **From a File** > **To Server and Its File**. In the **Open** window, select your license file and click [**Open**]. This installs all license codes in the file.
- **To type license codes:** In the **WlmAdmin** window, right-click your server and select **Add Feature** > **From a String**. In the **Add feature to server** window, type your license code exactly as it appears in the license file or on the packing slip. (The code is not case sensitive.) Be sure to select the **Add feature to server's file** check box.

When you enter a license code, the software adds this code to a file named **Lservrc** (which has no file extension) in the License Manager installation path.

Upgrade License Manager

To upgrade License Manager, you must use the following steps to remove the previous version of License Manager and then install the new version (version 8.3). Perform these steps at the computer where License Manager is installed.

1 Check in any licenses before upgrading.

2 Run **LoadLS.exe**, located in the folder where you installed the previous version of License Manager (typically, C:\Program Files\Rainbow Technologies\SentinelLM7x.x.xServer\English). Click [**Remove**], and then click [**OK**] to remove the Sentinel LM license manager.

3 Remove the previous License Manager version:

- In Windows Vista, Windows 2008 Server, and Windows 7: **Start > Control Panel** > **Programs** > **Uninstall a Program**.
- In Windows 8 and Windows 8.1: **Start** > **All apps** > **Control Panel** > **Programs** > **Uninstall a Program**.

Remove **Sentinel LM x.x.x.x. Server**.

4 Install the new version of License Manager. See "Install License Manager" on page 23.

5 Copy the **Lservrc** file from the directory you identified in step 2 to the 8.3 directory of License Manager. Typically, the 8.3 directory is C:\Program Files\Common Files\SafeNetSentinel\Sentinel RMS License Manager\WinNT.

6 Click [**Start**] and then select **Settings** > **Control Panel** > **Administrative Tools** > **Services**. Find **Sentinel RMS License Manager** in the list of services, right-click the service, and then select [**Restart**].

I. After You Complete Your Setup

1 Restart all programs and services that you shut down for the installation.

2 The Sage Estimating software performs a series of checks the first time you start it. If the Sage Estimating software notifies you of any error conditions, correct the condition before continuing.

3 Sage Estimating provides supporting documents in the **Documents** folder of the Sage Estimating installation files. These documents are available in Adobe Acrobat (PDF) format only. If you do not already have Adobe Acrobat or Acrobat Reader, you can download Adobe Acrobat from www.adobe.com.

IMPORTANT: For performance reasons, if you plan to run a virus scanner on the machine that hosts the SQL Server instance, you should exclude files that have MDF, LDF, NDF, BAK, TRN, and TRC extensions. You should also exclude additional processes for the version of SQL Server that you are running. For more information about the files and processes to exclude, see Microsoft Knowledgebase article 309422 at http://support2.microsoft.com/kb/309422.

J. Other Installation Scenarios

Terminal Server

Follow the steps for “Scenario 2 (Workgroup environment, estimating data shared from one workstation)” on page 13, with these exceptions:

- Always use **Add or Remove Programs** to start an installation to a terminal server.
- If you install Sage Estimating on a Windows 2008 Server terminal server, begin the installation by selecting **Control Panel > Install Application on Terminal Server**. Follow the prompts and browse to the **install.exe** file.
- If you use another server to host Sage Estimating databases, install only Sage Estimating products to the terminal server.

Chapter 4—Data Migration

If you have been using a Pervasive-based version of Sage Estimating, you can migrate (transfer) your existing Pervasive-based data to the Microsoft® SQL Server® database platform if you want to use it with this release.

NOTES:

- You must be using Sage Estimating 9.6 or later to migrate your data.
- If you are currently using Sage Estimating 9.6, you cannot perform data migration from a computer operating with Windows Vista®.

Overview

The process of migrating or making your existing Sage Estimating data compatible for use with the new Sage Estimating is performed using the data migration feature of the Estimating Management Console. This feature performs two functions when you select a Pervasive database for migration:

1 Validates your existing data for compatibility with Microsoft SQL Server.

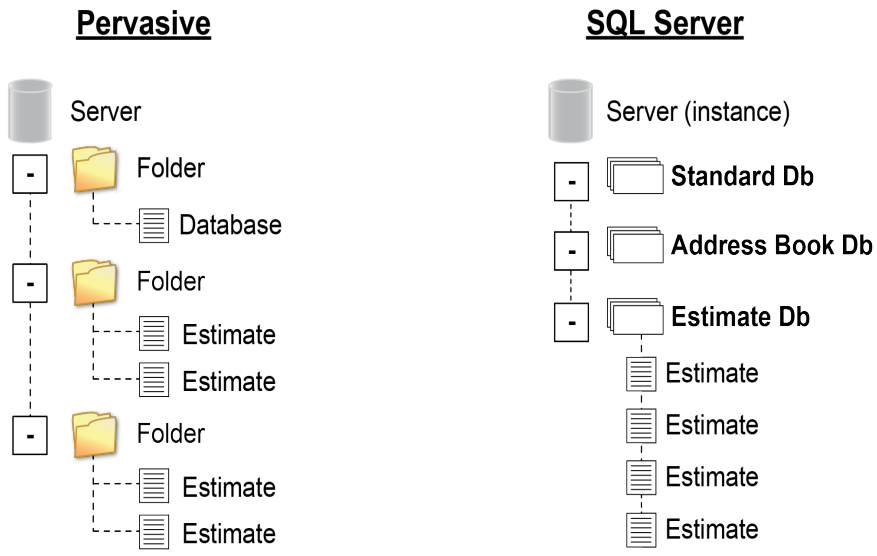
2 Migrates or creates new SQL Server tables with your Sage Estimating data.

The Estimating Management Console performs these steps together when you start the data migration process. When you migrate your Pervasive databases, the Estimating Management Console creates corresponding .mdf and .ldf files in the specified SQL Server instance.

Changes in the Database Structure

Whereas Pervasive allows you to arrange your estimates in a hierarchical folder structure within each database, Microsoft SQL Server stores all your estimates in just one estimate database. It also stores your standard database and Address Book information separately.

Figure 5: Comparison of Pervasive and SQL Server



If you have arranged your estimates in Pervasive folders and subfolders, the Estimating Management Console attempts to re-create the arrangement using "branches" in place of folders. These branches are for organizational display purposes only; they do not change the structure of your SQL Server database.

During the migration process, the Estimating Management Console may rename some of your database files to comply with SQL Server requirements. For more information on renaming database files, refer to the Estimating Management Console Help.

Migrating Your Data

Begin the process using the Estimating Management Console (select **Start** > **All Programs** > **Sage** > **Sage Estimating** > **Estimating Management Console**).

IMPORTANT: You must have Sage 300 Construction and Real Estate version 9.6 or later installed on the computer where your Pervasive SQL data is stored to perform data migration. You must also have a copy of Sage 300 Construction and Real Estate version 9.6 or later installed on the local computer where you are performing your data migration.

1. From the Estimating Management Console, click [**Data Migration**].
2. Select step **2—Settings** in the Data Migration window.
3. Click **SQL Server** (left-hand pane) then select a destination **Address Book** and **Estimate** database for your migrated data.

   Click [**Select**] next to the **Address Book Database** or **Estimate Database** box to specify a database from the current instance.

4 Click **Pervasive** (left-hand pane).

The Estimating Management Console performs an automatic check of your Pervasive databases and verifies they meet data migration prerequisites.

The Estimating Management Console displays one or more error messages if prerequisites are not met. Correct each error condition then try the verification process again by clicking [**Reverify**].

5 Click [**Options**] then select the **Enable detailed logging** check box if you want to generate detailed entries in the migration event log.

Clear the **Enable detailed logging** check box to prevent detailed migration event logging.

NOTE: Enabling detail logging may cause the data migration process to perform slower.

6 Click step **3—Select Databases**.

7 Click [**Browse**] and locate the path to the data folder where the Pervasive data you want to migrate is located then click [**OK**].

The **Data Migration** window displays the selected folder path in the **Starting folder** box.

The Sage Estimating scans the selected folder for all Pervasive databases that are available for migration and displays them in a list below the **Starting folder** box. If desired, you can click the arrow key to the right of the [**Browse**] button and perform one of the following actions:

- **Cancel scanning.** The scan process can be lengthy, depending on the number and size of the files within the selected folder. Select this option to stop the scan at any time.
- **Rescan.** Select this option to scan the selected folder again.

NOTE: The Estimating Management Console does not scan backup data folders (**PEBackup** folders). If the Estimating Management Console is unable to locate certain Pervasive databases, the databases may be residing in a PEBackup folder. Try renaming the PEBackup folders and restart the scan.

8 Select the check box for each Pervasive database in the list that you want to migrate.

You can select estimate, Address Book, and standard databases for migration.

NOTE: To preserve links between estimates and standard databases, Sage recommends migrating your estimates concurrently with (or after) your standard databases. Migrating estimates before or separately from their standard databases breaks any links with their associated standard databases and disables certain editing functions in the spreadsheet.

9 Click [**Migrate**] to begin the migration process.

The migration process may take some time, depending on the size of the databases you are migrating. You can view the status of the migration from the migration event log by clicking step **4—Event log**.

If desired, you can also select other Pervasive databases for migration by repeating steps 1-9. Any additional migration jobs you schedule are placed in a queue and performed in order.

NOTES:

- Ensure you select the **Queued** check box at the top of the migration event log to see a list of pending migration jobs in the queue.
- Do not attempt to access any of the databases you are migrating until the migration process is finished; you cannot access a database while it is migrating.

10 Repeat steps 1-9 as necessary to migrate all Pervasive databases you want to use with Sage Estimating.

Chapter 5—Configuring SQL Server

If you are installing or upgrading Sage Estimating, and you already have a supported Microsoft® SQL Server® installation on your computer or server, you can use the existing SQL Server install by setting up another instance (database server).

For information about supported editions of Microsoft SQL Server, see “Supported Editions of SQL Server and Other Applications” on page 5.

Setting Up a SQL Server Instance for Use With Sage Estimating

If you have an existing instance of a supported version of Microsoft SQL Server installed, you can set up another instance to work with Sage Estimating. (Options described in this section may vary slightly depending on the edition you are installing.)

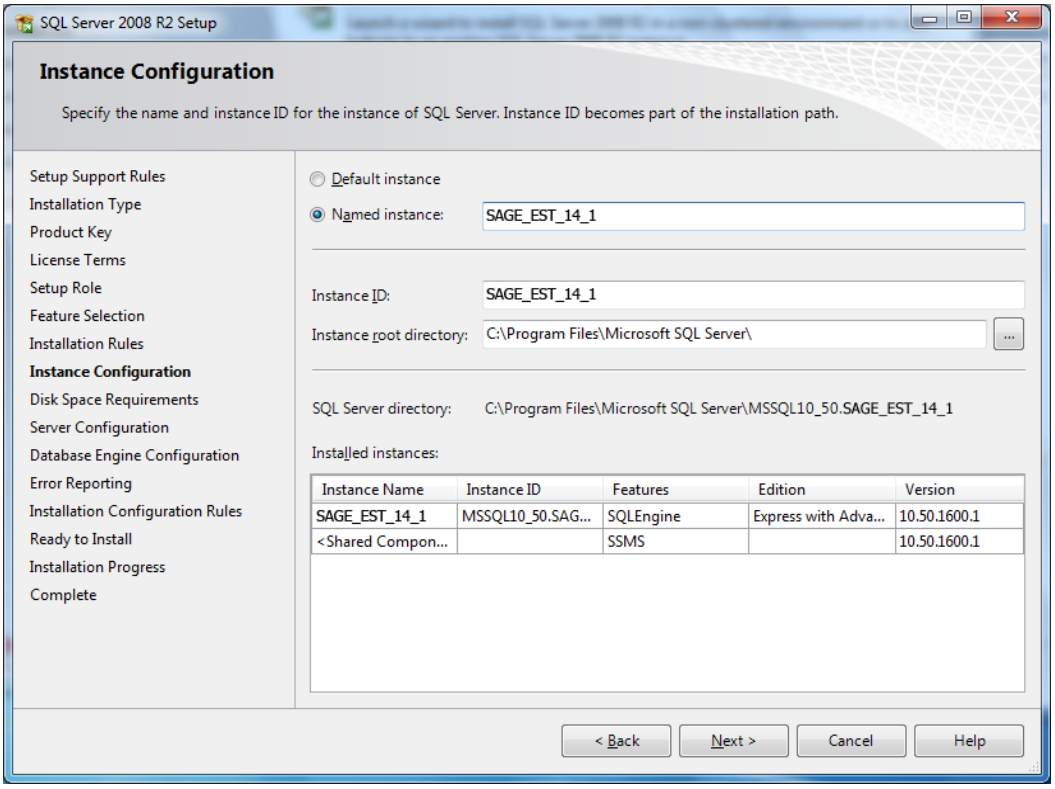
NOTE: If you choose to uninstall your existing instance first, reboot your server before reinstalling to avoid problems with the new installation.

CAUTION: Do not change the owner of any databases in the Sage Estimating instance.

Set your new SQL Server instance to the settings as outlined in the following sections.

Named Instance

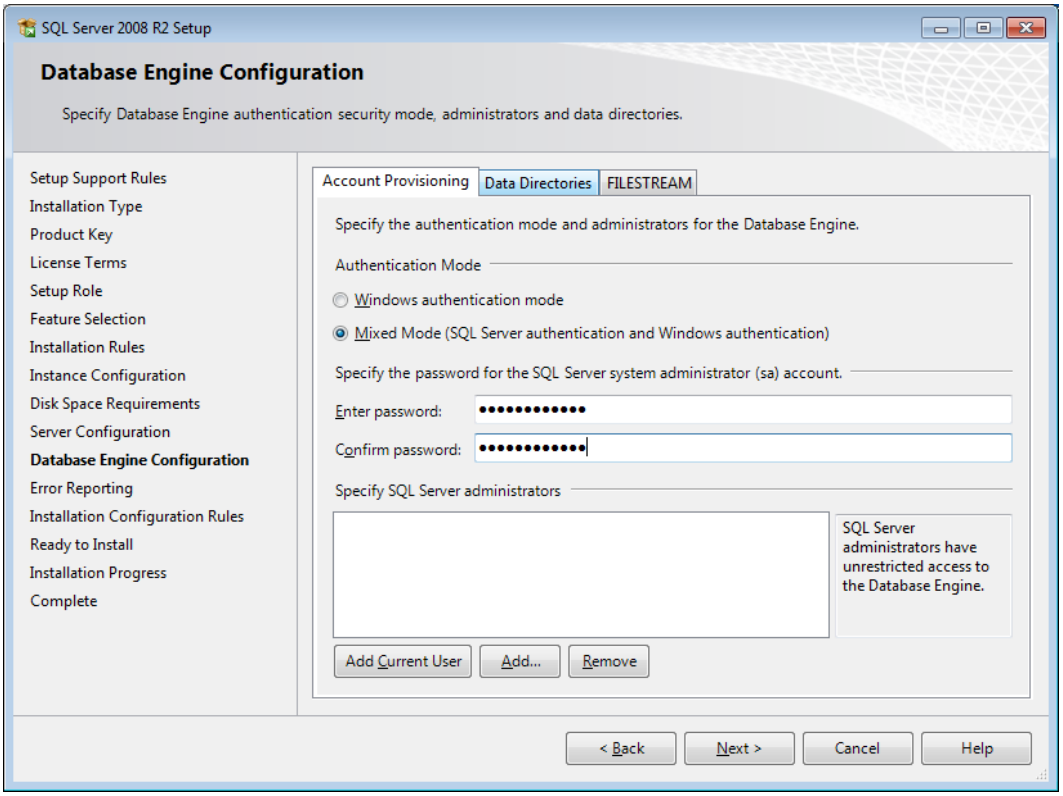
Figure 6: Instance Configuration Settings



You must use a named instance. You can give the instance any name you want; however, if you have installed a previous version of Sage Estimating (such as version 11.2), give the new instance a different name that is easily recognizable (such as SAGE_EST_14_11).

Authentication Mode

Figure 7: Authentication Mode Settings



The instance must support **Mixed Mode** authentication (**Windows Authentication and SQL Server Authentication**). This means either Windows authentication or SQL Server authentication can be used to access the database information.

When Windows authentication is used, the operator must have permissions to use SQL Server or be a member of a group that has those permissions. In Windows authentication mode, SQL Server validates the account name and password using information from the Windows operating system.

When SQL Server authentication is used, the operator must have system administrator (**sysadmin**) rights in SQL Server. SQL Server authentication is used for backwards compatibility and requires a strong password.

Collation Settings

Collation settings must be **Latin1_General**, **case-sensitive**, and **accent-sensitive** (**Latin1_General_CS_AS**).

You can customize the collation settings during the server configuration portion of the SQL Server install. In the SQL Server collation customization window, make the following selections:

- Select the **Windows collation designator and sort order** option (instead of **SQL collation**, which is the default)
- **Latin1_General** (for the collation designator)
- **Case-sensitive**
- **Accent-sensitive**
- Clear all other options

Assigning Database Permissions

Database permissions for SQL Server instances used with Sage Estimating are now set up using the **Security** feature in the Estimating Management Console.

For more information on setting up SQL Server security for Sage Estimating, see "F. Set Up Roles and Permissions" on page 20.

Setting the Firewall for Workgroups

If you are using SQL Server with a workgroup, you must set the firewall on the workgroup server to allow workstation computers to connect to the instance.

NOTE: If you are using SQL Server on a domain-based server, you may still need to configure your firewall to allow remote communication. Refer to the *SQL Server Guide* for instructions.

Firewall Settings (Windows Vista, Windows 2008 Server, Windows 7, Windows 8, and Windows 8.1)

1. Open Windows Firewall (click **Start** > **Control Panel** > **System and Security** > **Windows Firewall** > **Advanced Settings**, or in Windows 8 or Windows 8.1, click **Start** > **Windows System** > **Control Panel** > **System and Security** > **Windows Firewall** > **Advanced Settings**).
2. Right-click on **Inbound Rules** and select **New Rule**.
3. In the **Inbound Rule** wizard, select **Port** and click [**Next**].
4. Select **TCP** and **Specific local ports**.
5. In the **Specific local ports** box, type **8005** then click [**Next**].
6. Select **Allow the connection** and click [**Next**].
7. Select the **Domain**, **Private**, and **Public** check boxes then click [**Next**].
8. In the **Name** box, type **Sage Estimating Service** (or other appropriate name) and click [**Finish**].

Additional Recommendations

To ensure accurate performance, Sage **strongly** recommends making changes and verifications to the following settings in SQL Server Management Studio and SQL Server Configuration Manager. Failure to make these changes may result in poor Sage Estimating performance or communication difficulties between Sage Estimating and your SQL Server instance.

Memory

Determine the amount of available memory on the server or workstation where SQL Server is installed. To prevent SQL Server from consuming all available memory, use SQL Server Management Studio to set the maximum amount of memory (in the instance properties) to a reasonable limit (such as 4 GB) as follows:

1. Right-click on the SQL Server instance and select **Properties**.
2. In the Server Properties window, click **Memory** (left-hand pane).
3. Set the **Maximum server memory** amount to **4000** (or whatever limit you determine).

Communication Protocol

Set the communication protocol settings for the Sage Estimating SQL Server instance as follows:

1. Start the SQL Server Configuration Manager by selecting **Start** > **All Programs** > **SQL Server 2008** (or **SQL Server 2008 R2**) > **Configuration Tools** > **SQL Server Configuration Manager**.

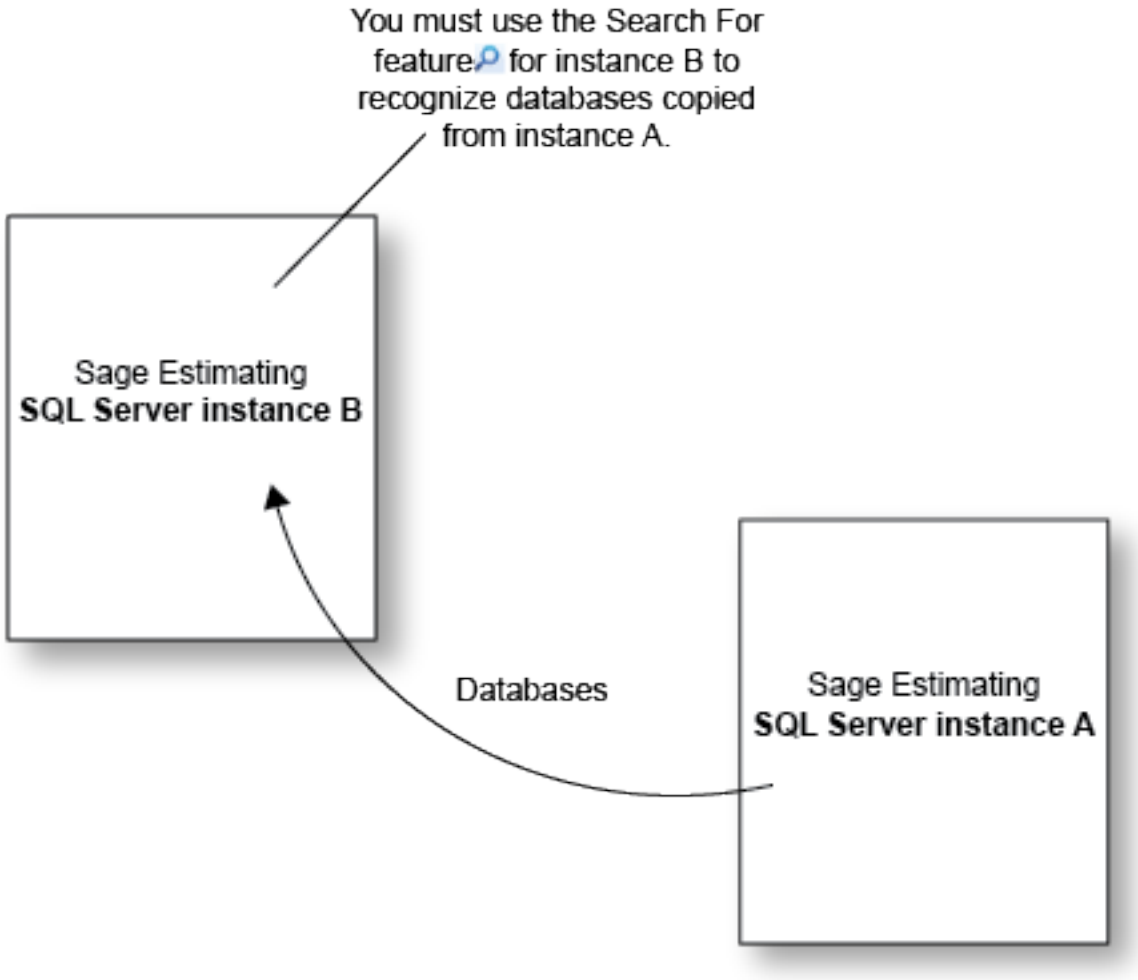
   In Windows 8, select **Start** > **All apps** > **Microsoft SQL Server** > **SQL Server Management Studio**.
2. In the left-hand pane of the **SQL Server Configuration Manager** window, click the arrow next to **SQL Server Network Configuration** to display all local SQL Server instances.
3. Select the instance associated with Sage Estimating (**SAGE_ESTIMATING**, by default).
4. In the right-hand pane right-click on a communication protocol and select **Disable**.
5. Repeat step 4 for all communication protocols **except TCP/IP**. Leave this protocol **Enabled**.
6. In the left-hand pane of the **SQL Server Configuration Manager** window, click the arrow next to **SQL Native Client 10.0 Configuration**.
7. Click **Client Protocols** (left-hand pane).
8. In the right-hand pane right-click on a communication protocol and select **Disable**.
9. Repeat step 8 for all communication protocols **except TCP/IP**. Leave this protocol **Enabled**.
10. Close the SQL Server Configuration Manager and restart the service.

Copying Databases from Other Instances

Sage Estimating allows the use of just one active SQL Server instance at a time. This instance is a "closed" SQL Server instance; Sage Estimating does not recognize databases (Address Book or standard databases) transferred or copied from other SQL Server instances unless they are added by way of the **Search For** feature in the Estimating Management Console.

For example, if you have two Sage Estimating installs, Install A and Install B, you cannot copy Address Book databases by copying them from Install A's SQL Server instance to Install B's SQL Server instance alone (using SQL Server Management Studio's built-in Copy Databases wizard, for example). You must also open the Estimating Management Console and use the **Search For** button in the Address Book Companies/Contacts toolbar.

Figure 8: Copying Databases From One SQL Server Instance to Another



Any database you add to an instance must have the same Sage Estimating version as the other operating databases. For example, if you are using Sage Estimating 14.12, and you want to add a standard database from a previous Sage Estimating installation, upgrade the standard database to version 14.12 before adding it to the new instance. Refer to the Estimating Management Console in-product Help for instructions on using the **Search For** feature.

You can switch active SQL Server instances at any time for Sage Estimating by starting the Configuration wizard, selecting **Server** from the left-hand pane, and clicking [**Change**] from the right-hand pane.

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