Sage

# Sage Fixed Assets

## Premier Installation Guide

Last updated 1/13/2026

# Contents

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# Chapter 1 Introduction

This guide contains information that will get your application up and running as quickly as possible. It includes information about installing these applications for the first time, as well as upgrading from a previous version of each product.

After installation, your computer will have the following Sage Fixed Assets Premier products:

- Depreciation
- Tracking
- CIP

## System Requirements

Before installing Sage Fixed Assets, review the System Requirements: Sage Fixed Assets Premier Edition article in the [Sage Knowledgebase](#) for the latest system requirements. The requirements listed here are the minimum requirements. As is true of all software products, enhancing your hardware and application software may improve performance.

> Note: Sage Fixed Assets applications do not operate in a clustered SQL Server environment.

## Security Requirements

The following rights are required to install and run the Sage Fixed Assets applications properly.

**Installation**

- The person installing the application must have **Administrative** rights to the local computer.
- During the installation of the network client, the client machine will need **Read** access to the SFAServ directory. After you install the server components, make sure that you share the SFAServ directory and not just its subdirectories.

> Note: The Sage Fixed Assets installation will create the Winfas account on the SQL Server. The Winfas account is used by the application to connect to the SQL Server database. Disabling or changing the password on this account will cause the application to no longer be able to connect to SQL Server databases.

# Microsoft SQL Server Requirements

Before beginning installation and creation of databases, you must verify that your server configuration meets the following requirements:

- You must use Mixed Mode Authentication when connecting to Microsoft SQL Server. You select Mixed Mode Authentication when you install Microsoft SQL Server. For more information about using Mixed Mode Authentication (rather than Windows Authentication Mode), please refer to your Microsoft SQL Server documentation.

- The Sage Fixed Assets application supports multiple instances of Microsoft SQL Server. The first time you launch the Database Utility, the application prompts you to create a system configuration database. You can select the desired SQL Server instance when you create the system configuration database.

  You can install the Sage Fixed Assets server components on a machine that uses any of the supported operating systems, whether Microsoft SQL Server is installed on that machine or not.

  If you are installing the server components on a computer that does not have Microsoft SQL Server on it, the Server installation will automatically drop the necessary SQL Server components that are required by the Database Utility.

  You can install the Sage Fixed Assets server components on Machine A even if Microsoft SQL Server is on Machine B. When creating the Sage Fixed Assets configuration database (Bestsys) on Machine A, in the Configure Bestsys Database dialog, select Machine B in the Engine Name field.

- The Microsoft SQL Server service must be started and running before execution of the installation application or the Database Utility.

- The Sage Fixed Assets application requires that the following Server Collation settings be applied:

  Server Collation: SQL_Latin1_General_CP1_CI_AS (1252)

  Character Set: ISO

# Implement Encrypted Microsoft SQL Server Communications (Recommended)

By default, SQL Server transmits data between the client and server in plaintext, which means sensitive information—such as queries and results—can be intercepted if the network is compromised. Encrypted communication ensures that all traffic between your application and SQL Server is protected using Transport Layer Security (TLS). When TLS is enabled, SQL Server and the client perform a handshake to establish a secure session, and all subsequent data packets are encrypted using strong cryptographic algorithms like AES. This prevents eavesdropping, tampering, and man-in-the-middle attacks.

## Why Enable Encrypted Communication?

Implementing TLS encryption for SQL Server connections is a best practice for safeguarding data in transit. It helps maintain confidentiality and integrity, reduces the risk of data breaches, and supports compliance with regulations such as GDPR and HIPAA. Even if your internal network is considered secure, encryption adds an extra layer of defense against misconfigurations or insider threats. For customers accessing SQL Server over public or hybrid networks, encryption is essential.

## Implementation Summary

To enable encrypted connections:

1. Obtain and install a valid TLS certificate on the SQL Server (issued by a trusted Certificate Authority).

2. Configure SQL Server to use the certificate and turn on the Force Encryption option. This will enforce all connections to that instance to be encrypted.

3. Restart SQL Server after configuration changes.

For detailed steps and requirements, refer to these official Microsoft resources:

- Configure SQL Server to encrypt connections

- SQL Server and client encryption summary

- Transport Layer Security and certificates overview

# Sage Fixed Assets Checklist

- Do you want to run the client application on the file server?

  To run the client application on the server, you must perform the client installation after you perform the server portion of the installation.

- Have you backed up your existing data (current users only) using the application's backup utility?

  To back up your data, select File/Company Utilities/Backup Company from the menu bar. Be sure to note the location of the backup.

# Microsoft SQL Server Checklist

Before you install Sage Fixed Assets on your server, go through this checklist and verify that you have completed all the required preliminary steps. If you answer no to any of these checklist questions, then do not proceed with the installation until you can answer yes to that step.

- Are you installing on a server that meets the minimum hardware requirements for Sage Fixed Assets?

- Is your tempdb for Microsoft SQL Server configured with a size of at least 100 MB, and is the tempdb located on a device other than the master device?

- Have you configured Microsoft SQL Server to meet the configuration settings?

  Server Collation: SQL_Latin1_General_CP1_CI_AS_(1252)

  Character Set: ISO

- Have you backed up your master database as well as any other existing databases on the file server on which you plan to install the Sage Fixed Assets application? In the event of a Microsoft SQL Server failure, you may need to restore the databases from a backup.

- Have you closed all other Windows applications, including virus-checking software, before you begin the installation?

  You are now ready to install Sage Fixed Assets on the server and create the required databases.

## Contacting Us

Within Sage Fixed Assets, select **Help>Sage Support** to display a list of support options. Select to access the product Knowledgebase, find product downloads and updates, or start a live chat session at http://www.sagefixedassets.com/pegg.

# Chapter 2 Installing Sage Fixed Assets Premier Server

## Overview of the Install Process

The install process consists of the following steps:

## Step 1: Installing the Sage Fixed Assets Server Components

In this step, you install the server components on the server machine.

> Note: You must be on the server machine to install the server components. You cannot install the server components from the client machine.

### To install the Sage Fixed Assets server components

1. Sign in to the Sage Knowledgebase.

2. Select the green "Download Sage Fixed Assets" box.

3. Select the link for the latest version of the program.

4. Select the **Download** button and open the downloaded file.

5. Select the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

6. Select OK. The system begins to download the file.

   The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, Microsoft Visual C++ 2017 Redistributable, Microsoft ODBC Driver 17 for SQL Server, Microsoft SQL Server 2016 Management Objects, and Microsoft SQL Server System CLR Types if it is not already installed..

7. Select the Install button. The system installs the required components, then displays the Welcome dialog. (You may need to restart your machine.)

8. Select the Next button. The Software License Agreement dialog appears.

9. Read the license agreement, and then select the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, select the No button. The system exits from the installation program.)

   After you select the Yes button, the Choose Destination Location dialog appears.

10. Select the folder in which to install the server components, and then select the Next button. The system begins installing the software and the Setup Status dialog appears.

    When all files have been installed, a message informs you that:

    - The application will launch the Database Utility, and

    - You MUST specify the attachments folder for PDF files attached to images.

11. Select OK. The InstallShield Wizard Complete dialog appears.

12. Select the Finish button.

> Note: Once the InstallShield Wizard completes, the message below will appear, providing guidance on the next steps for database conversion and client installation. After reviewing the information, select OK to close the message.
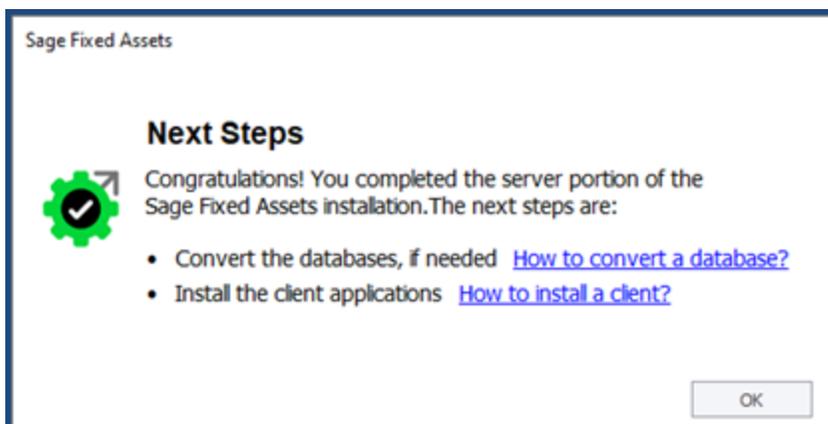
# Step 2: Creating the Configuration Database

When you installed the application, you provided the necessary information to create the Configuration Database (BESTSYS). The first time you launch the Database Utility, the database will be created for the Configuration Database. The BESTSYS database contains critical information about the application and your Sage Fixed Assets asset databases, but it does not contain any asset information.

If you chose to launch the Database Utility, a message prompts you to create the Configuration Database. Otherwise, follow the steps below to launch the Database Utility.

> Note: The Database Utility may appear behind any currently open dialogs. Close or minimize the open dialogs to view the utility.
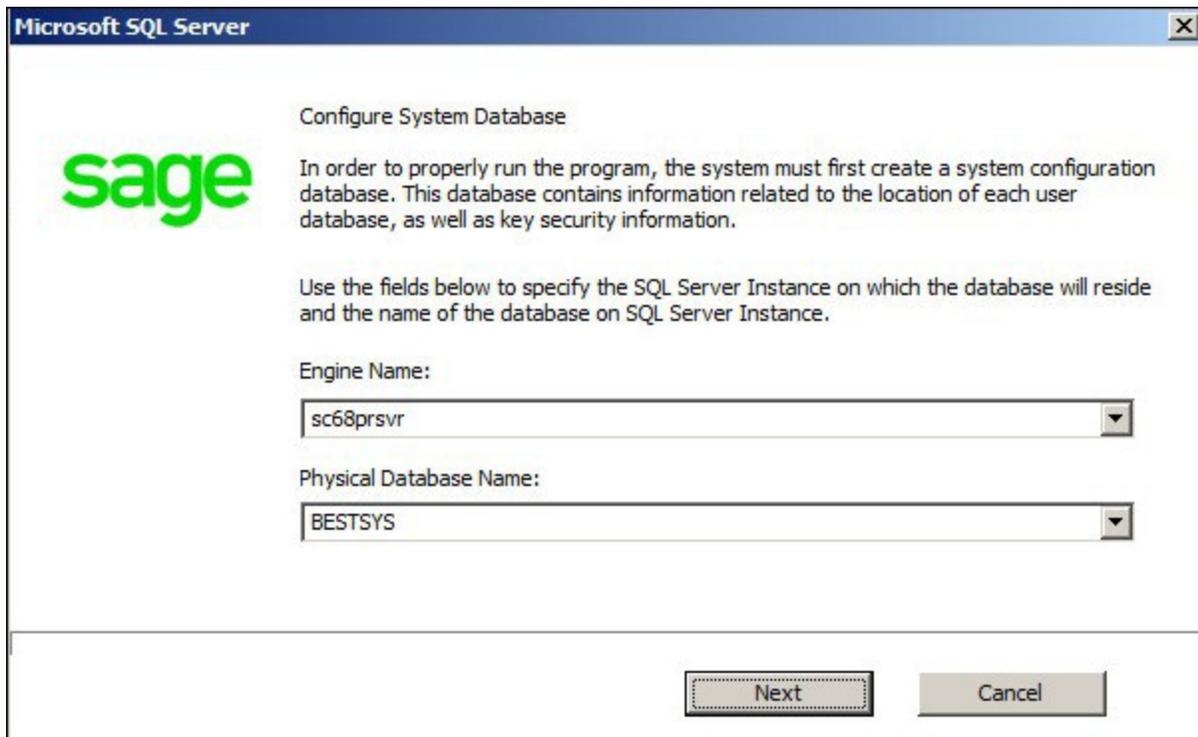
## To create the Configuration Database

1. Select Start/Programs (or All Programs) from the Windows taskbar.

2. Select the Sage Fixed Assets program group.

3. Select the Tools program group.

4. Select the Database Utility Premier Depreciation & Tracking icon (or the Database Utility - Premier CIP icon). A message prompts you to create the Configuration Database. Select OK to proceed.

   If you are launching the utility for the first time, the application displays the Configure System Database dialog.

   If you are creating the Bestsys database from a machine that does not have Microsoft SQL Server on it, you must point to the Microsoft SQL Server machine.

5. Select or enter the Microsoft SQL Server machine in the Engine Name field.

- **Engine Name**

    Use this field to enter the name of the SQL Server on which the Configuration Database will reside.

- **Physical Database Name**

    Use this field to change the name of the Configuration Database.

> Note: We strongly recommend that you do NOT change the default database name of BESTSYS.

6. Select the Next button. The application displays a login dialog.

7. Enter your system administrator login name and password used to log in to Microsoft SQL Server, and then select OK. The application returns to the Configure System Database dialog.

8. Select the Next button. The application displays a message indicating that the Configuration Database does not exist and asking if you want to create it now.

9. Select the Yes button to proceed. The application displays a dialog that allows you to specify a location for the Configuration Database.
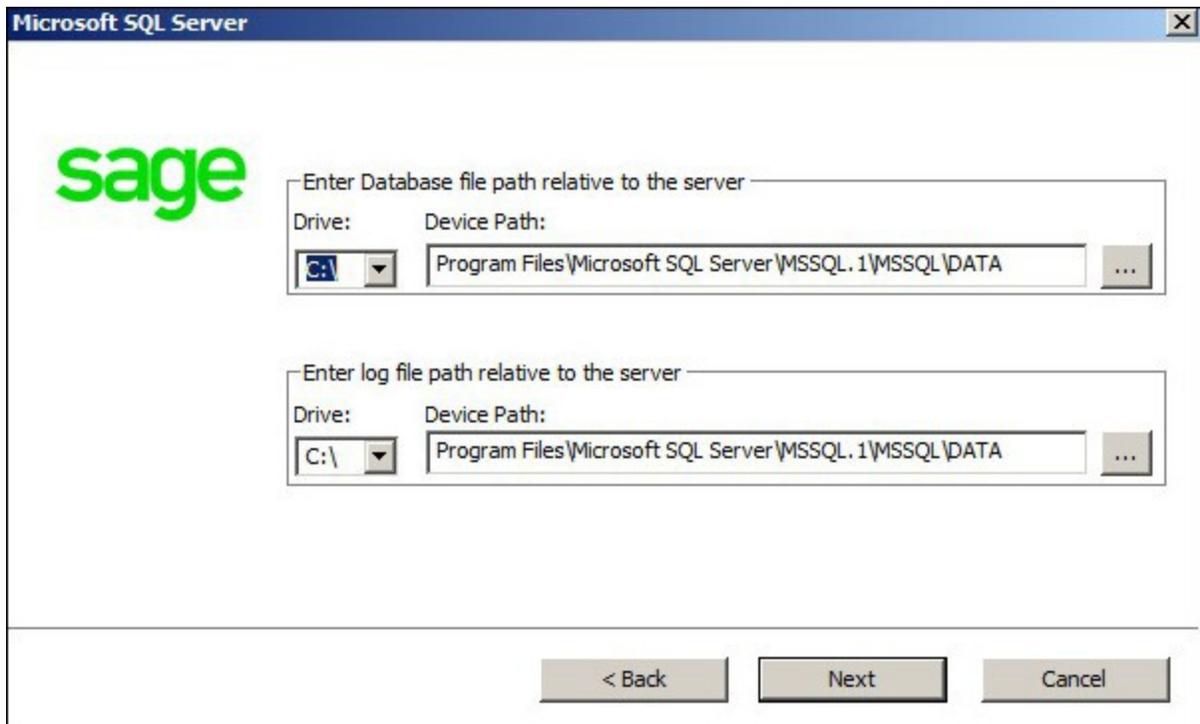
10. Specify the location of the Configuration Database, then select the Next button. The application displays a dialog that provides information about the Configuration Database.
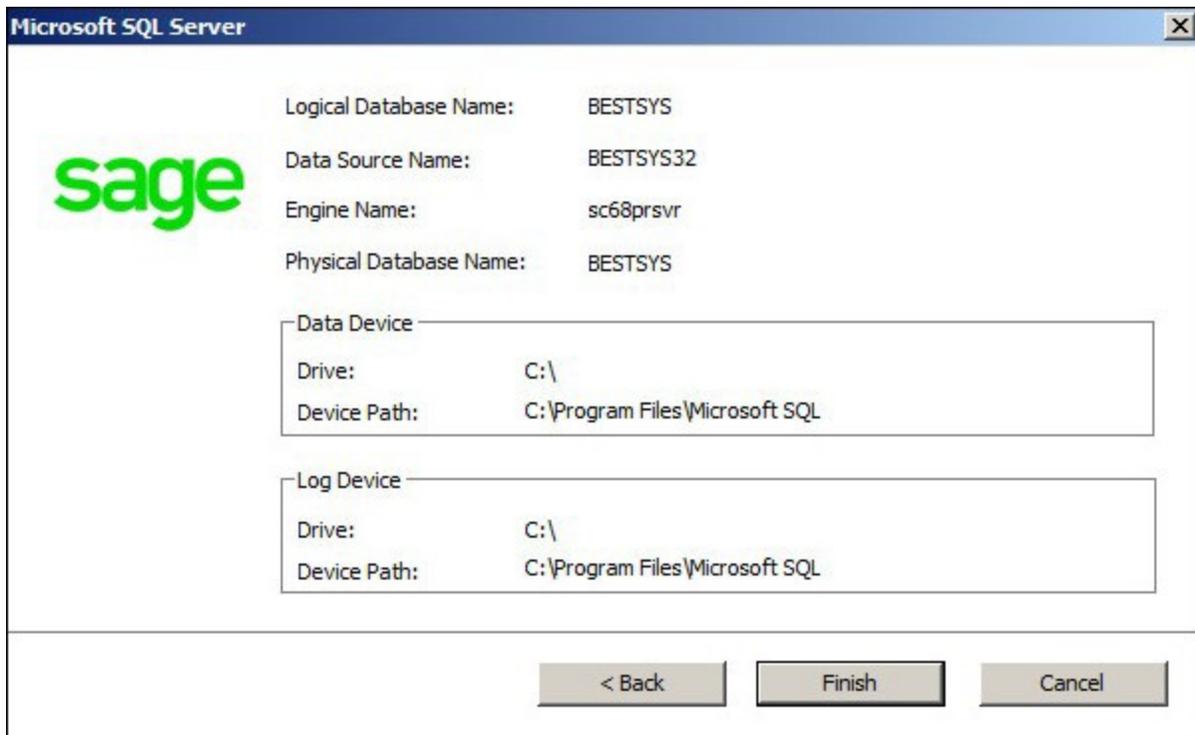
11. Review the information, then select the Finish button. The application displays a message indicating that you need to create a new asset database.

## Step 3: Creating an Asset Database

You must create at least one asset database before you install the client components and run the application.

### To create an asset database

1. Select OK to proceed. The application displays a dialog that allows you to enter information about the asset database.
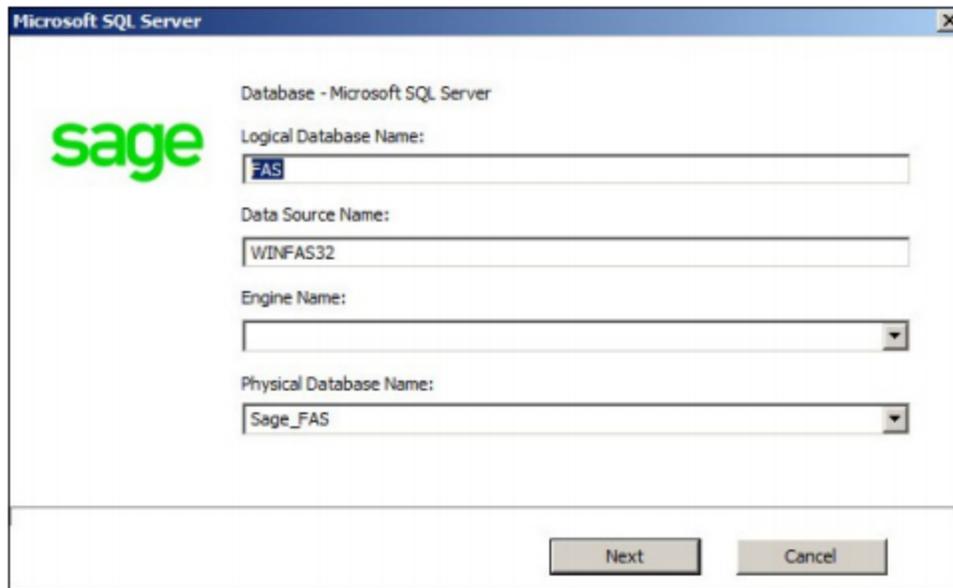
- **Logical Database Name**

  Use this field to enter the "user friendly" name for the new database as you want it to appear in the Database field inside the application. This name can consist of up to 50 characters. We recommend that the Logical Database Name match the Physical Database Name.

- **Data Source Name**

  You MUST use the default name that the application provides.

- **Engine Name**

  Use this field to enter the name of the computer or SQL instance on which the MS SQL Server is running.

- **Physical Database Name**

  Use this field to enter the name of the database as you want it to appear (or as it already appears) on the MS SQL Server machine. We recommend that the Physical Database Name match the Logical Database Name.

2. Select the Next button. The application displays a message confirming that you want to create the asset database now.

3. Select the Yes button to proceed. The application displays a dialog that allows you to specify information about the asset database.
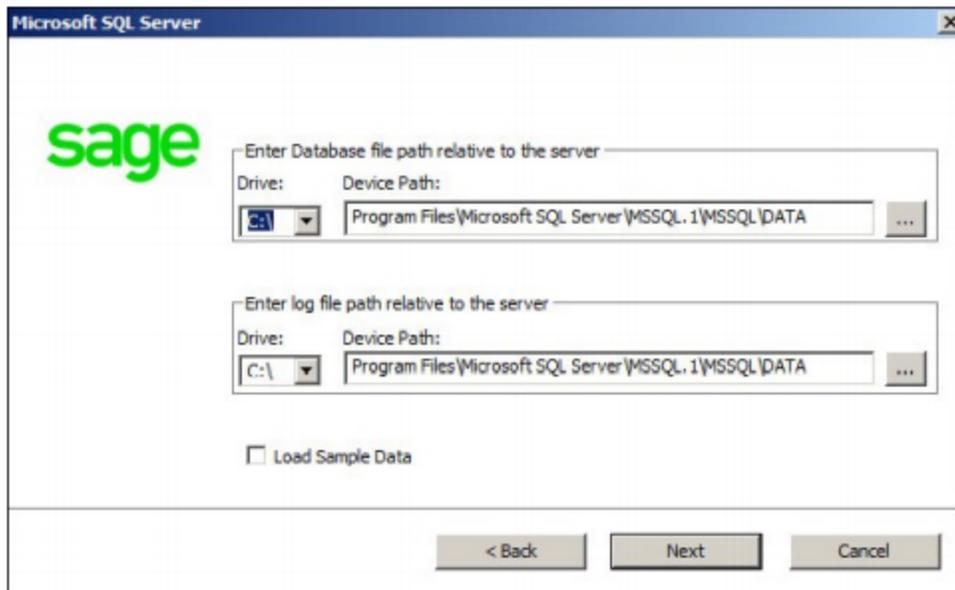
- **Enter Database File Path Relative to the Server**

  Use these fields to enter the Drive and Path of the new device. You can use the Browse button next to the Device Path field to select the path for the device.

  The name of the device depends on the physical database name entered in the previous dialog. For example, if the physical database name is Newbestdb, then the device will be named Newbestdb.mdf.

- **Enter Log File Path Relative to the Server**

  Use these fields to enter the Drive and Path of the log file for the new database. You can use the Browse button next to the Device Path field to select the path for the log file.

  The name of the log file depends on the physical database name entered in the previous dialog. For example, if the physical database name is Newbestdb, then the log file will be named Newbestdblog.ldf.

- **Load Sample Data (Recommended)**

  Select this check box if you want the database to contain a sample company with sample assets. We have included a sample company called Sample Company. You can use this sample data for learning about the features of the application.

  > Note: You should select this check box to load the sample data at least once.

4. Select the Next button. The application displays a window that summarizes the information about the asset database.

5. Select the Finish button. The application displays the Database Utility dialog.
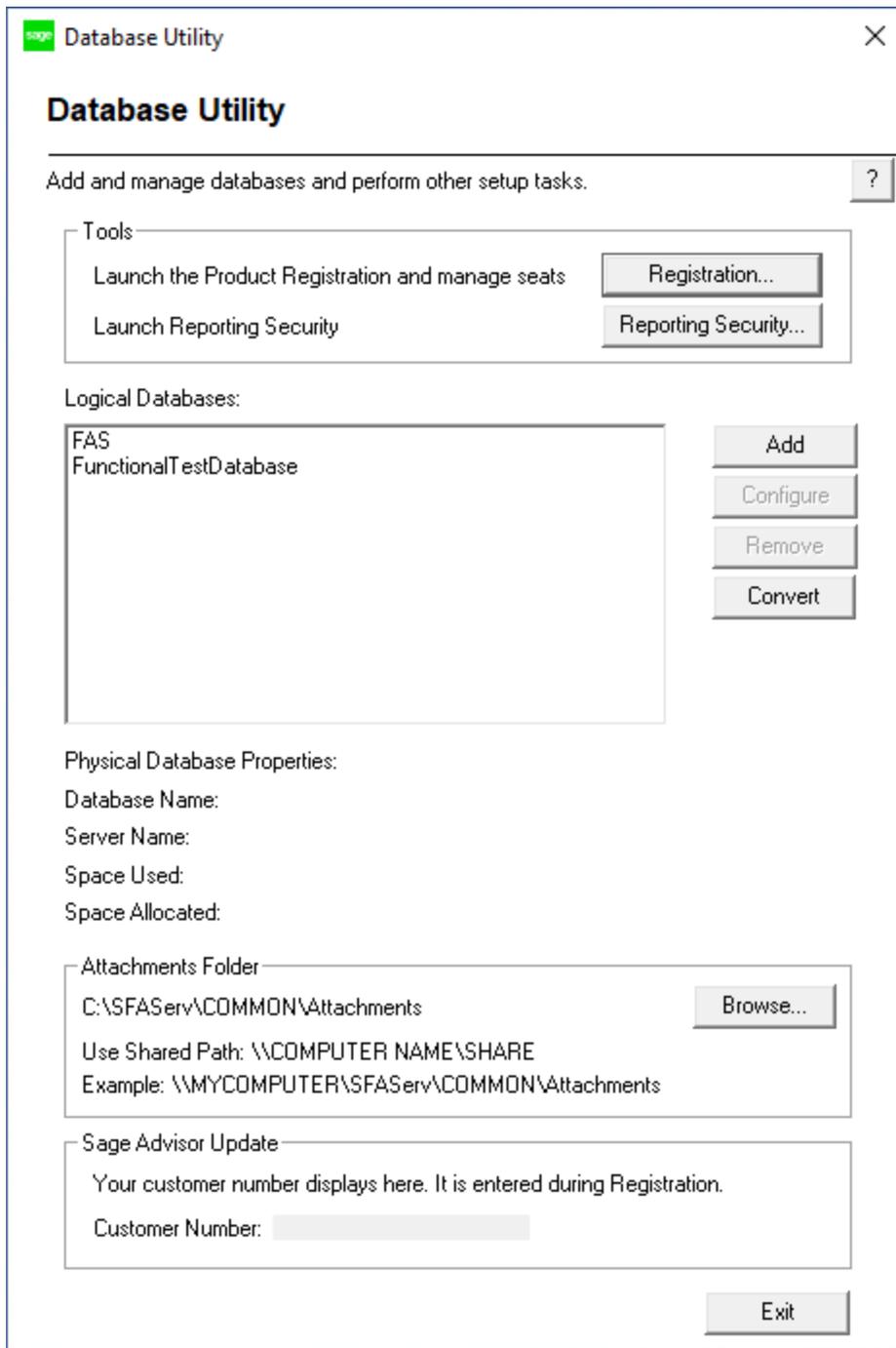
- **Logical Databases**

    The application uses this field to list the logical names of databases. These are the database names that appear in Sage Fixed Assets. When you select a database, the application displays information about that database underneath the list box in the Physical Database Properties field.

> Note: Although the application allows multiple logical database names for a single MS SQL Server database, it is not recommended.

- **Physical Database Properties**

  The application uses this field to display information about the selected database.

  - **Database Name**

    This is the actual database name as it appears on the MS SQL Server.

  - **Server Name**

    This is the name of the server on which the database resides.

  - **Space Used**

    This is the disk space that is currently being used by the database.

  - **Space Allocated**

    This is the disk spaced allocated for this database.

- **Add Button**

  Select this button to display a window that allows you to add a new database.

- **Configure Button**

  Select this button to display a window that allows you to change the attributes of the selected database.

- **Remove Button**

  Select this button to remove the selected database. When you remove a database, you only remove information about it from the Configuration Database (BESTSYS). You do not actually remove it from the MS SQL Server. To remove it from the MS SQL Server, you must use either Enterprise Manager or Microsoft SQL Management Studio.

- **Convert Button**

  Select this button to convert data used in a previous version of the Sage Fixed Assets application.

- **Attachments Folder**

  The system uses this field to display the directory path of the folder containing the files of images attached to assets.

> Note: This folder contains only Adobe PDF file attachments.

- **Browse Button**

    Select this button to select or create a different folder that will contain the files of images attached to assets.

- **Customer Number**

    Enter your customer number in order to receive notifications about future updates. You can find the customer number on the packing slip. If you cannot find your customer number, contact your Sage Account Manager at 800-368-2405.

## To add additional asset databases

Follow the steps below to add additional asset databases.

1. Select Start/Programs (or All Programs) from the Windows task bar.
2. Select the Sage Fixed Assets program group.
3. Select the Tools program group.
4. Select the Database Utility icon. The Database Utility dialog appears.
5. Select the Add button to add a new asset database.

# Step 4: Sharing the SFAServ Folder

The next step is to share the \SFAServ folder with read access for the following users or groups:

- Users of the Sage Fixed Assets application
- Domain Administrators (optional)

The procedure for sharing the SFAServ folder is slightly different depending on the platform you are using.

Below we show the steps for sharing a folder on Windows Server 2022.

## To share the SFAServ folder

1. Open File Explorer and navigate to the folder you want to share.
2. Right-click on the folder and select **Properties**.
3. In the Properties window, select the **Sharing** tab.
4. Select the **Advanced Sharing** button.
5. Check the **Share this folder** box.

6. (Optional) If needed, change the **Share name** and the number set for **Limit the number of simultaneous users**.

7. Select the **Permission** button to configure the permissions for the shared folder. From here, you can add users and assign their permissions (Read, Change, Full Control).

8. Select **Apply** and then **OK** to confirm the settings.

Users can now access the shared folder by typing the UNC path (e.g., \\ServerName\ShareName) in Windows Explorer.

# Step 5: Setting Up the Attachments Folder for PDFs

You can use the Images tab in Asset Detail to attach an image to an asset. The application stores most types of image files in the asset database. However, the application stores Adobe PDF file attachments in a separate folder.

The application creates an Attachments folder during installation. You can find it under C:\SFAServ\COMMON on the server machine. You must specify the path to this folder or to another folder in the Attachments field on the Database Utility.

> Note: Make sure the folder that you select is either shared or underneath a shared folder.

## Setting up the attachments folder

1. On the Database Utility, select the Browse button. The Browse for Folder dialog appears.

2. Select (or create) the folder that will contain the Adobe PDF file attachments. The directory path must appear in the format \\COMPUTER NAME\SHARE NAME\folder path. For example, if the computer name is "MYCOMPUTER" and the share name of the SFAServ folder is "SFAServ," then the path to the existing attachments folder would appear as:

   \\MYCOMPUTER\SFAServ\COMMON\Attachments.

3. Enter this path in the Folder field of the Browse for Folder dialog.

4. Select OK to close the Browse for Folder dialog. The selected folder appears in the Attachments Folder field.
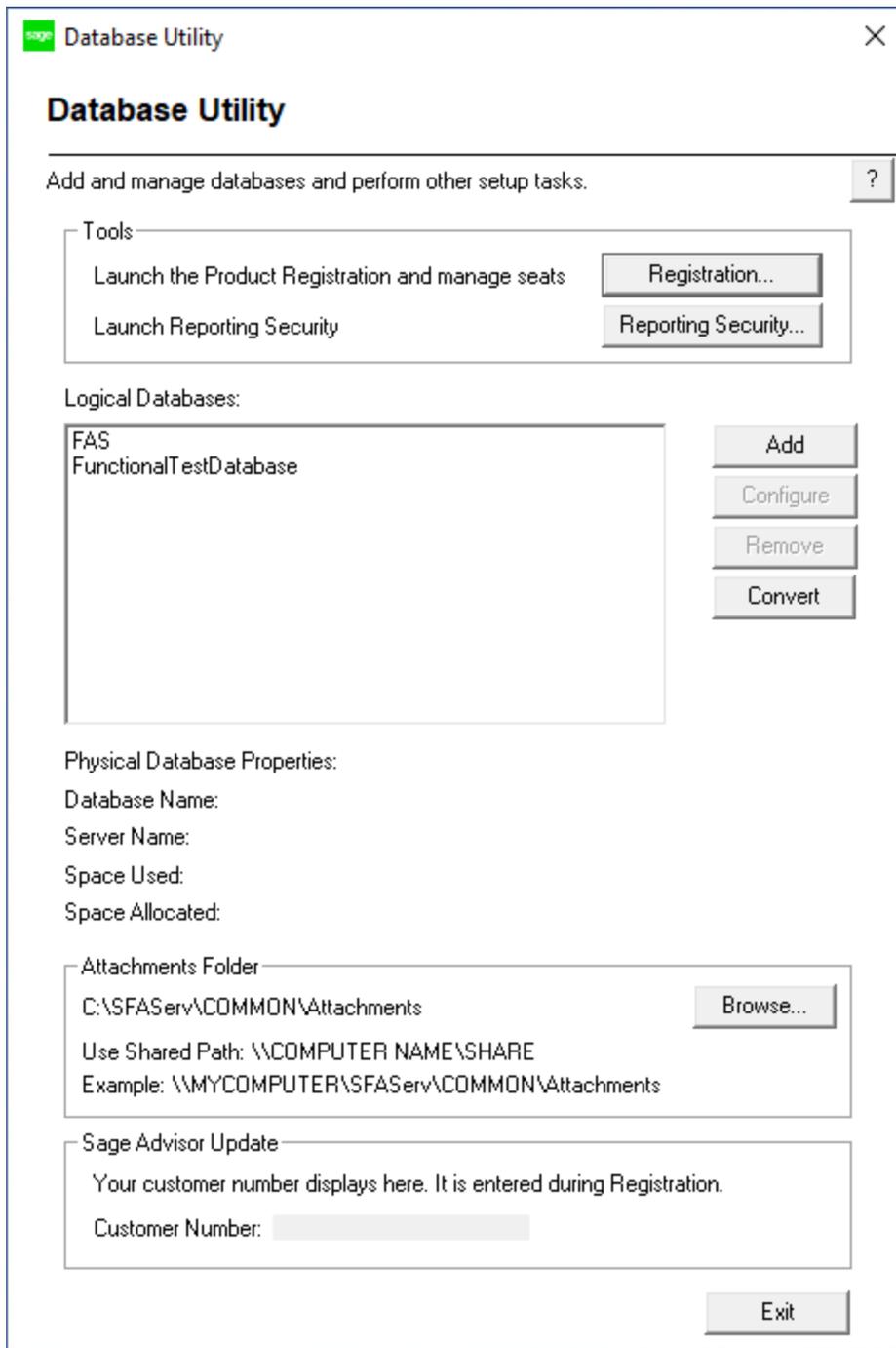
5. Select the Exit button to close the Database Utility.

# Step 6: Launching the Database Utility - Premier CIP

The Database Utility - Premier CIP must be launched at least once in order to install the client components. If you see this message, follow the steps below.

1. Select OK to continue.

2. Select OK to create the System Configuration Database. See "Step 2: Creating the Configuration Database", on page 7 and "Step 3: Creating an Asset Database", on page 10.

# Step 7: Installing the Sage Fixed Assets Reporting Server Components (Optional)

Sage Fixed Assets Reporting enables you to create custom reports. It is a powerful program that allows you to design, create, print, and distribute your custom reports. In this step, you install the Sage Fixed Assets Reporting server on the server machine.

> **Note**: The latest version of Sage Fixed Assets Reporting uses SAP® Crystal Reports 2020 (Crystal Reports). A previous version of Sage Fixed Assets Reporting used Crystal Reports 2016. If both versions of Crystal Reports are on your machine Sage Fixed Assets Reporting will default to Crystal Reports 2020.

> **Note**: Sage Fixed Assets Reporting may not be compatible with other versions of Crystal Reports. Before installing Sage Fixed Assets Reporting, we recommend that you make sure Crystal Reports 2020 is compatible with your other applications that run Crystal Reports.

## To install the Sage Fixed Assets Reporting server components

1. Sign in to the Sage Knowledgebase.

2. Select the green "Download Sage Fixed Assets" box.

3. Select the link for the latest version of the program.

4. Select the **Download** button and open the downloaded file.

5. Select the **Run** button when prompted to either Run or Save the file. The system displays the **Sage Download Manager** dialog.

6. Select OK. The system begins to download the file. The system automatically displays the Sage Fixed Assets Reporting Server Welcome dialog. Select the Next. The Software License Agreement dialog appears.

7. Read the license agreement, and then select the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, select the No button. The system exits from the installation program.)
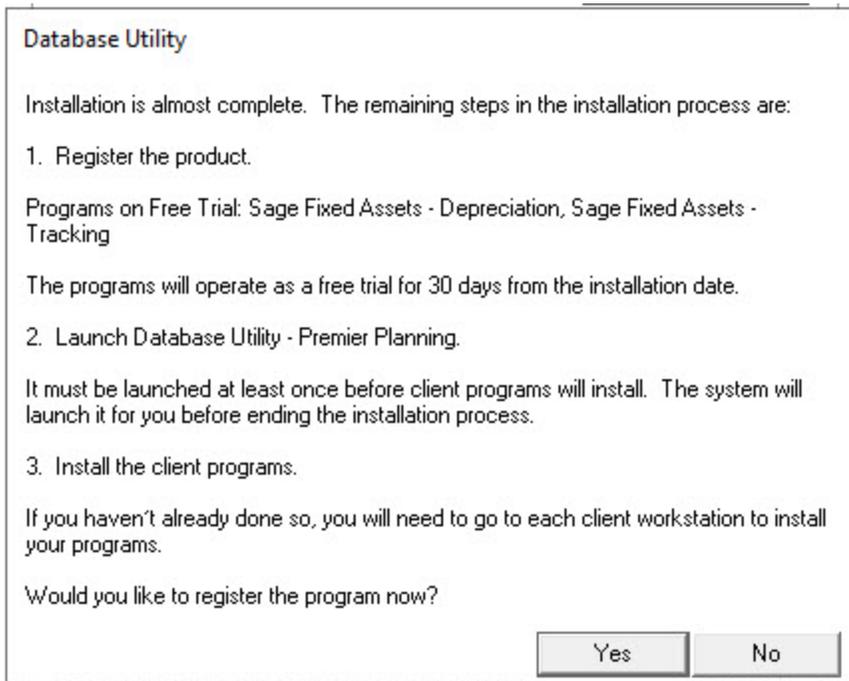
8. Select the **Finish** button.

For instructions on installing the Sage Fixed Assets Reporting client components, see Chapter 7, "Installing Sage Fixed Assets Reporting", on page 47.

# Step 8: Registering the Application

Registering your application provides the following benefits:

- Simplifies the activation of your product which must be done before use.

- Automatically updates subscriptions, eliminating the need to manually enter registration codes.

- Provides immediate access to newly ordered products.

If you close the Database Utility without registering the application, a message appears reminding you to register.

```
Database Utility

Installation is almost complete.  The remaining steps in the installation process are:

1.  Register the product.

Programs on Free Trial: Sage Fixed Assets - Depreciation, Sage Fixed Assets -
Tracking

The programs will operate as a free trial for 30 days from the installation date.

2.  Launch Database Utility - Premier Planning.

It must be launched at least once before client programs will install.  The system will
launch it for you before ending the installation process.

3.  Install the client programs.

If you haven't already done so, you will need to go to each client workstation to install
your programs.

Would you like to register the program now?

                                              Yes          No
```

## To register the application

1. On the server machine, select the Start button on the Windows taskbar, and then select Programs (or All Programs) from the Start menu.

2. Select the Sage Fixed Assets program group.

3. Select the Tools program group.

4. Select the Database Utility Premier icon for the Database Utility - Premier Depreciation & Tracking or the Database Utility - Premier CIP and the Database Utility dialog appears.

5. Select the **Registration** button. The Registration Status dialog similar to the one shown below appears.
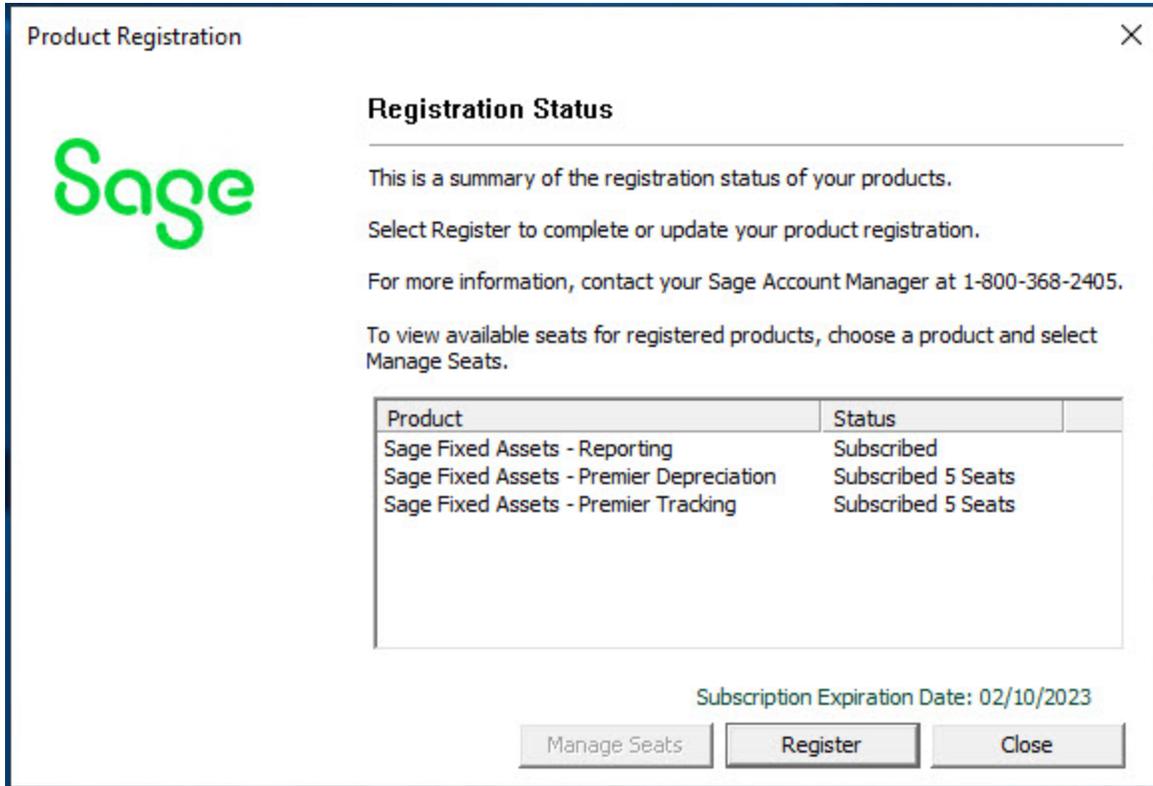
6. Select the Register button. A Register dialog opens.



7. Enter your customer number in the **Customer Number** field and serial number in the **Serial Number** field.

> **Note**: If you cannot find your Customer Number, Serial Number, Activation Code, or Unlocking
> Code (subscription only), they are available in several places:
> - In the email from Sage confirming your Sage Fixed Assets order.
> - On the invoice for your Sage Fixed Assets order.
> - From your Sage Account Manager at 1-800-368-2405.
> You will need your Customer Number when contacting Sage for assistance.

8. To automatically register your product [internet connection required], select the **Activate** button. A Registration Succeeded message displays after a few moments.

9. To manually register your product, select **Enter Code** to manually register your product by entering your **Activation Code** and **Unlocking Code** (subscription only) using the Enter Codes dialog. Select OK.
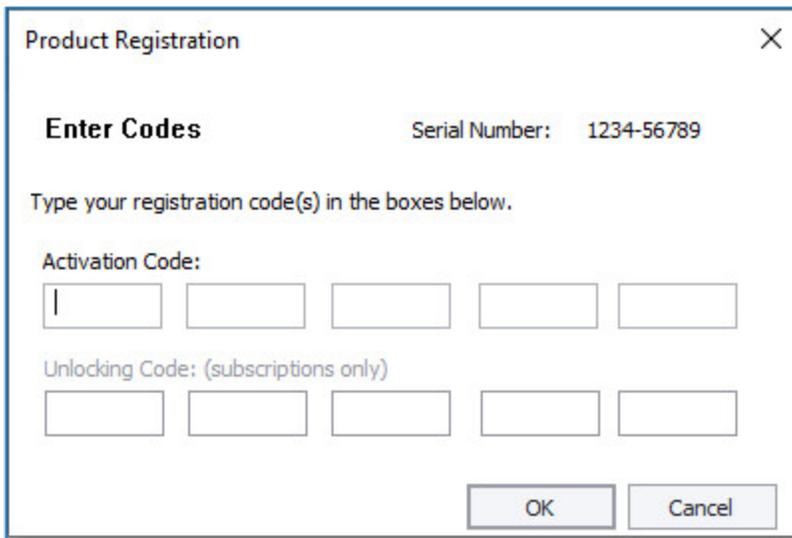
> Note: If you are a subscription customer, the Unlocking Code field will become enabled after entering your Activation Code.

10. The Registration Status dialogs displays showing your registration.

    a. Subscription customers will see a status of "Subscribed" and the subscription expiration date at the bottom right-hand corner.

    b. All other customers will see a status of "Purchased".
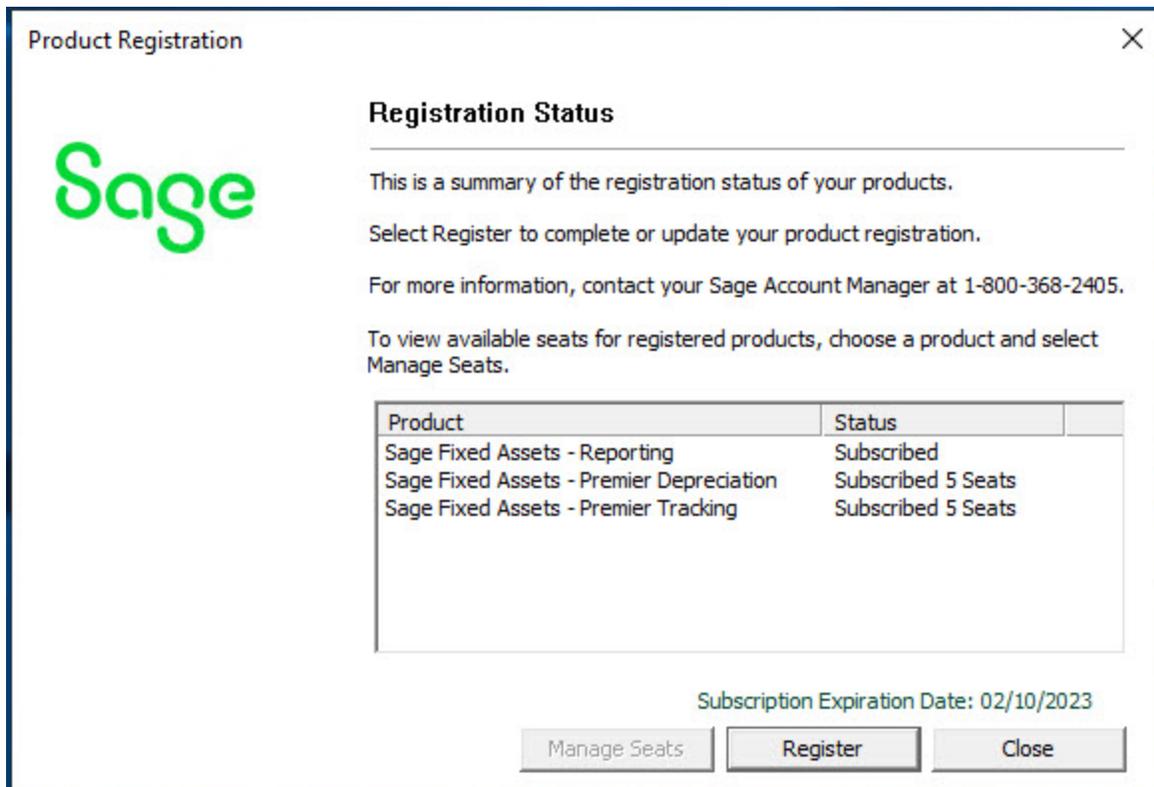
11. Select **Close**.

## Using an Expired Subscription

If your subscription expires, a message displays when you open your product indicating that you have a 30-day grace period to continue to use all features in the program. After 30 days, the 120-day read-only period begins. For up to 120 days, you can continue to use these features: *Open Company, Custom Export, Excel Export, Open/Print Reports, and Print Asset List*. If you exceed the 120-day read-only period, a message displays when you open your product. Follow the steps in "To Register the application" above to register.

## Managing Seats

The Seat Information window allows you to view your seat and grace period information, activate an unlicensed computer, or deactivate a licensed computer. Deactivation is useful for situations such as employee turnover or if an employee gets a new computer.

### Understanding the grace period

Depreciation and Tracking have a seven-day, company-wide grace period for unlicensed computers. If your seat count is exhausted and an unlicensed user signs in, they can choose to continue (which automatically starts the grace period) or cancel. The grace period cannot be extended and does not reset per user. Unlicensed computers cannot access the program after the grace period expires.

## To activate an unlicensed computer

1. On the server machine, select the Start button on the Windows taskbar, and then select Programs (or All Programs) from the Start menu.

2. Select the Sage Fixed Assets program group.

3. Select the Tools program group.

4. Select the Registration - Premier Depreciation & Tracking icon (or the Registration - Premier CIP icon). The Product Registration dialog appears.
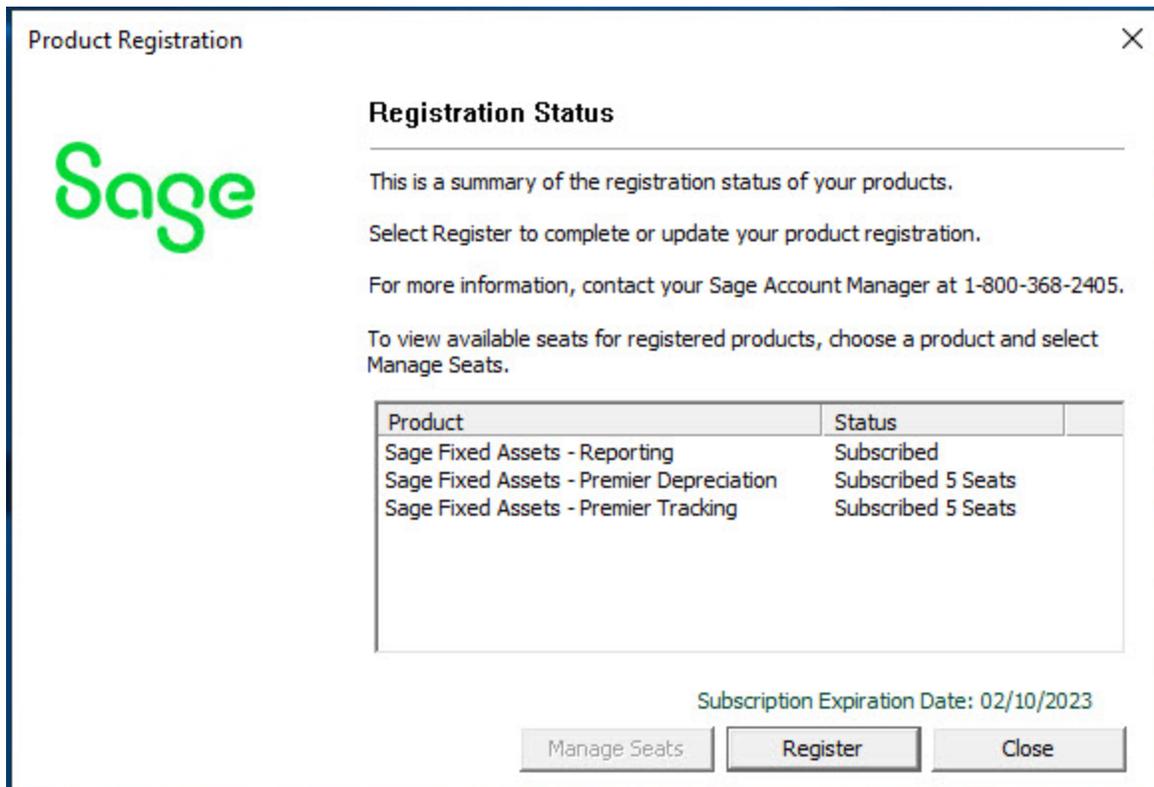


5. Select the Manage Seats button. The Seat Information dialog appears.
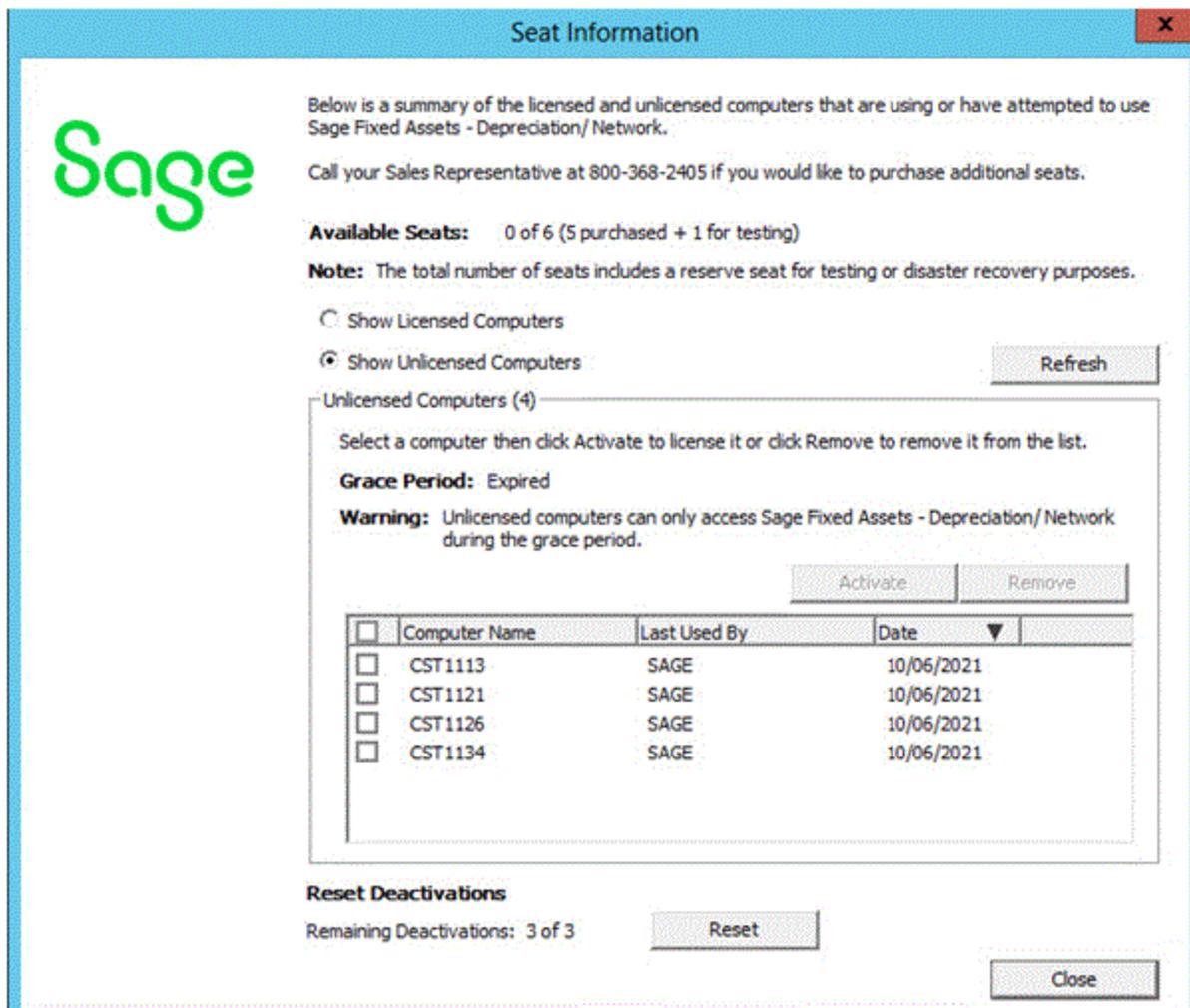
6. Verify that you have an available seat in the Available Seats field.

7. Select Show Unlicensed Computers to filter the list.

8. Select the computer you want to activate.

9. Select Activate. Sage Fixed Assets moves the computer to the Licensed Computers list and your seat count is reduced by one.

## To deactivate a licensed computer

1. Open the Seat Information dialog.

2. Select Show Licensed Computers to filter the list.

3. Select the computer you want to deactivate.
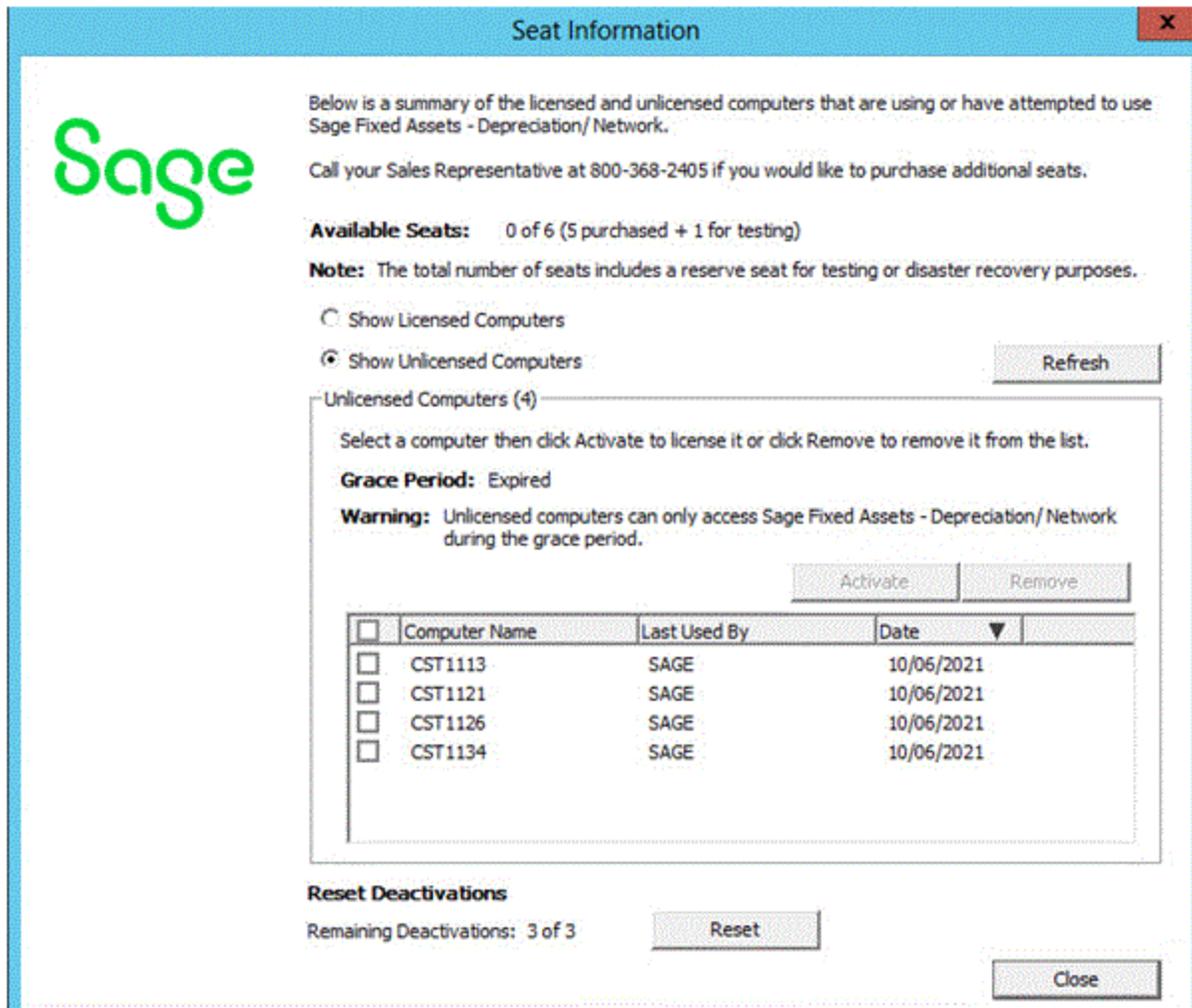
4. Select Deactivate. Sage Fixed Assets increases your available seat count by one and reduces the number of Remaining Deactivations by one.

## To remove an unlicensed computer

1. Select Show Unlicensed Computers to filter the list.

2. Select the computer you want to remove.

3. Select Remove to remove it from the Unlicensed Computers list.

## To reset deactivations

Each Sage Fixed Assets installation has a set number of deactivations according to how many seats in your license. If you use all of your deactivations, you can select Reset in the Reset Deactivations section at the bottom of the Seat Information window then follow the instructions to request a reset code.
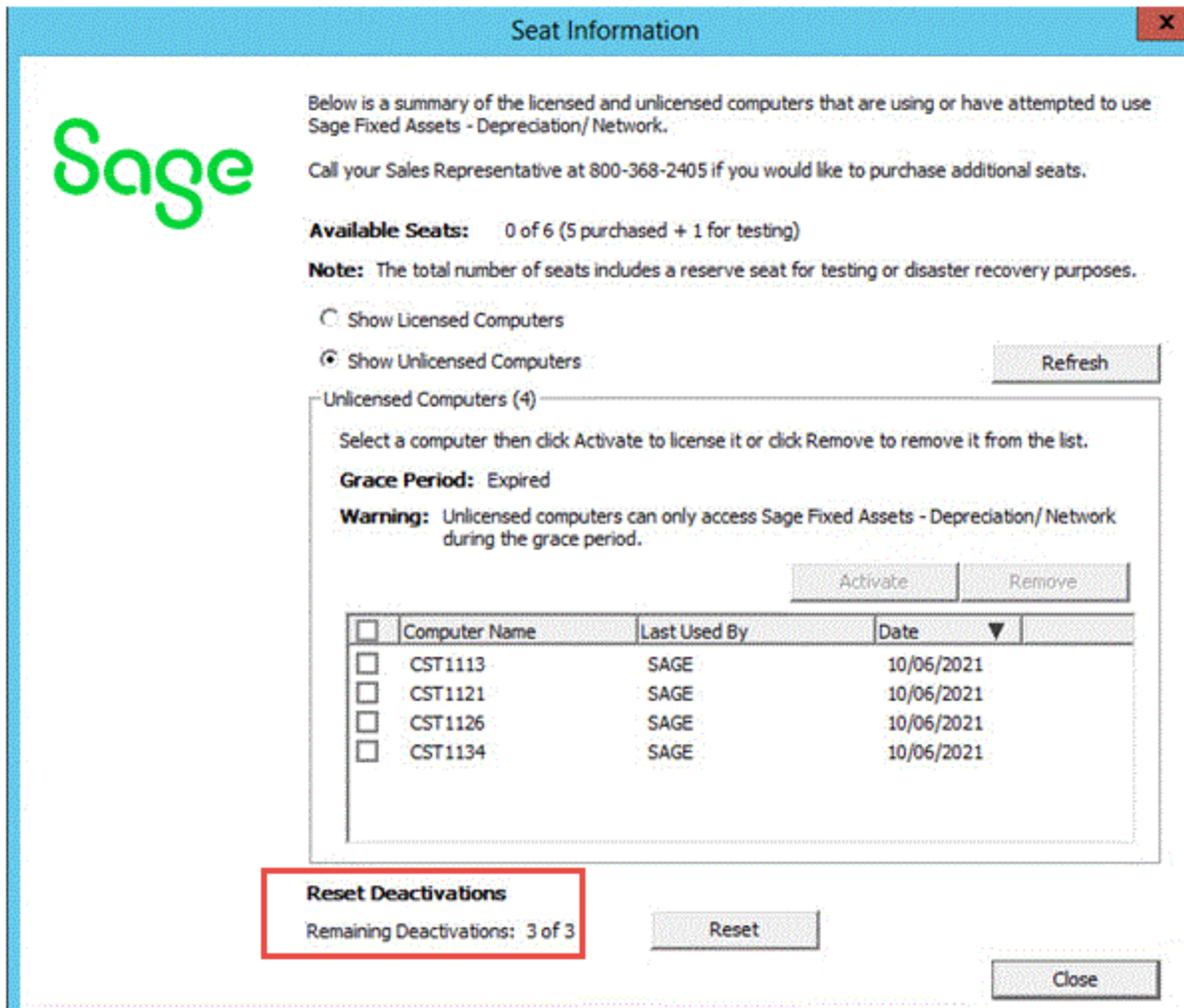
# Step 9: Mapping a Drive to the SFAServ Folder (Optional)

Now that you have shared the SFAServ folder, optionally, you can map a network drive to that directory on each workstation.

> Note: Instead of mapping a drive to the SFAServ folder, you can install the client components by entering the UNC path (\\Servername\Foldername) in the Run dialog on the client machine.

## To map a drive to the SFAServ folder

1. On each workstation, open **File Explorer** from the taskbar or the **Start** menu, or press the **Windows logo key + E**.

2. From the left pane, right-click **This PC** and choose **Map network drive**. The **Map Network Drive** dialog appears.
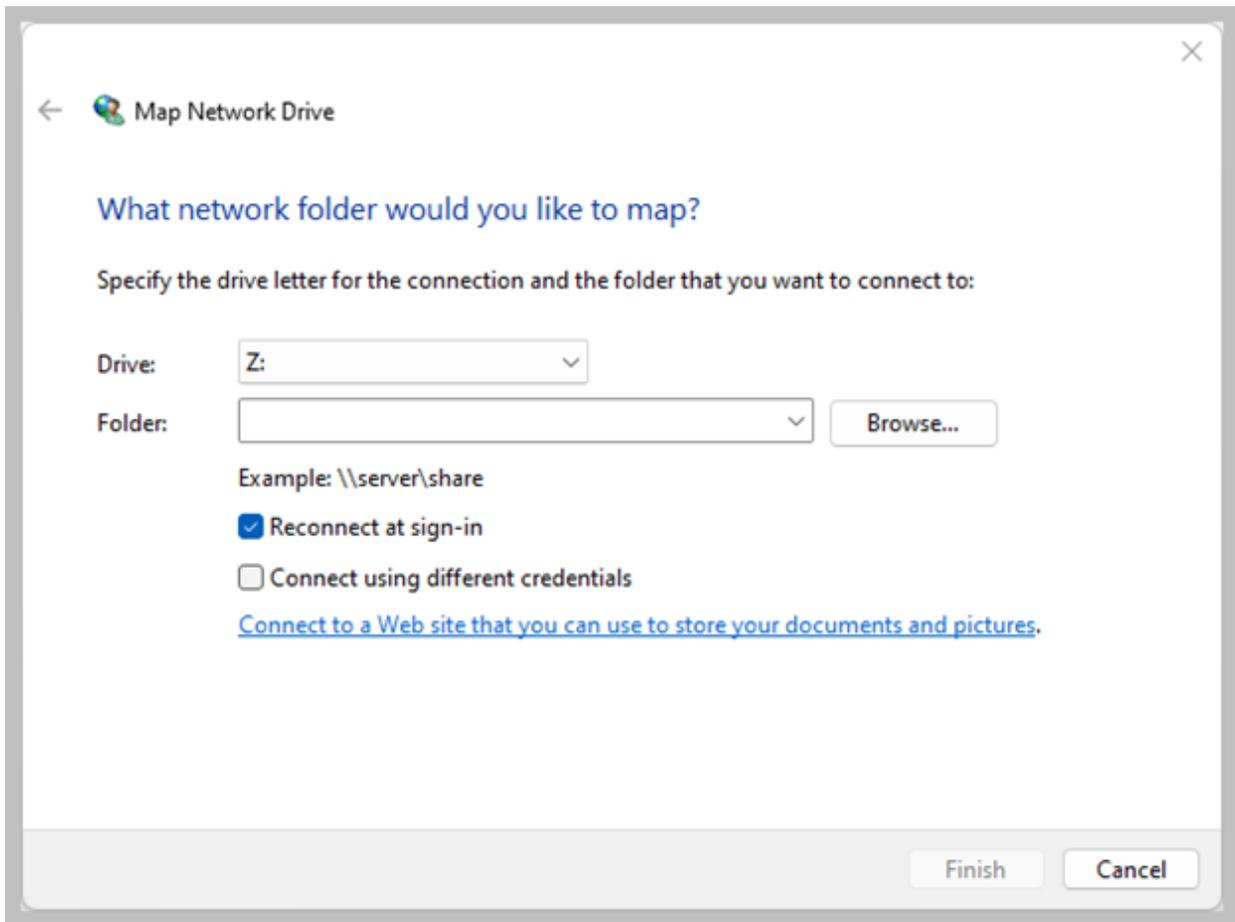


3. In the **Drive** list, select a drive letter. (Any available letter will do.)

4. In the **Folder** box, enter the folder or computer path, or select the **Browse** button to locate and select the SFAServ folder on the server. To automatically connect each time you sign in to your PC, check the **Reconnect at sign-in** option.

> Note: Do **NOT** map a drive to a folder underneath the SFAServ folder, such as the Premier Client folder.

5. Select the Finish button to close the Map Network Drive dialog.

# Chapter 3 Installing Sage Fixed Assets Premier Client

## Installing the Client Components

> Important: The Sage Fixed Assets Premier client installation cannot be completed until the Database Utility for Premier Depreciation & Tracking and the Database Utility for Premier CIP have been launched at least once.

Follow the steps below on each workstation on which you will run the application. You can also install the client application on the server for testing purposes.

### To install a client on a workstation

1. Do one of the following:

   - Go to My Computer and browse to the network drive that you mapped in the previous step. Locate the folder in which you installed the server components (SFAServ is the default) and double-click the SETUP.EXE file in the Premier Client subfolder.

   - Select Start/Run from the Windows taskbar. The Run dialog appears. In the Run dialog, enter the UNC path (\\Servername\Foldername) to the folder containing the server components.

     - In the Run dialog, enter the mapped drive path to the folder (for example, Z:\SFAServ\Premier Client\SETUP.EXE.

       (Substitute your network drive letter for "Z" if it is different.)

       > Note: If you mapped the Z: drive to \SFAServ, then the path would be: Z:\Premier Client\SETUP.EXE.

2. Select OK. The system begins to download the file. The system prompts you to install Sage Advisor Update, Sage SBDDesktop, Microsoft .NET Framework, Microsoft Visual C++ 2017 Redistributable, Microsoft ODBC Driver 17 for SQL, Microsoft Visual C++ 2015 2022 Redistributable Package and Microsoft Visual C++ 2015 Redistributable if it is not already installed.

3. Select the Install button. The system installs the required components, and then displays the Welcome dialog. (You may need to restart your machine.)

4. Select the Next button. The License Agreement dialog appears.

5. Read the license agreement, and then select the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, select the No button. The system exits from the installation program.)

   After you select the Yes button, the Choose Destination Location dialog appears.

6. Select the location for the client components, and then select the Next button. The system begins installing the software, and the Setup Status dialog appears.

When all files have been installed, the InstallShield Wizard Complete dialog appears.

If the installation program determines that you need to restart your computer before you use the program, it displays two options on the InstallShield Wizard Complete dialog. You can either allow the system to restart your computer immediately, or you can restart your computer at a later time.

> Tip: We recommend that you allow the system to restart your computer at this time if prompted to do so.

7. Select the Finish button.

# Starting the Application

Follow the steps below to start the application from a workstation.

> Note: You can start the program by double-clicking the icon on your desktop.

## To start the application from a workstation

1. Select Start/Programs (or All Programs) from the Windows taskbar.

2. Select the Sage Fixed Assets program group.

3. Select the appropriate program icon.

## Finding your customer number

Your customer number is available in several places:

- In the email from Sage confirming your Sage Fixed Assets order.

- On the invoice for your Sage Fixed Assets order.

- On the Register Window (**Help > Registration > Register**) if you have previously registered.

- On the About Window (**Help > About Sage Fixed Assets**) if you have previously registered.

- From your Sage Account Manager at 800-368-2405.

After you have registered your product, your customer number can also be found at **Help > Update User Information**.

You will need your Customer Number when contacting Sage for assistance.

# Chapter 4 Upgrading Sage Fixed Assets Premier Server

> **Important:** The Sage Fixed Assets Premier client installation cannot be completed until the Database Utility for Premier Depreciation & Tracking and the Database Utility for Premier CIP have been launched at least once.

## Previous Versions Compatible with the Latest Version

You must be currently using the prior Midyear release or the prior Tax Update release of Sage Fixed Assets Premier Server to follow the steps in this chapter. If you are not, install prior releases in sequential order through the compatible version before you upgrade.

> **Note**: The latest version of Sage Fixed Assets Reporting uses SAP® Crystal Reports 2020 (Crystal Reports). A previous version of Sage Fixed Assets Reporting used Crystal Reports 2016. If both versions of Crystal Reports are on your machine Sage Fixed Assets Reporting will default to Crystal Reports 2020.

> **Note**: Sage Fixed Assets Reporting may not be compatible with other versions of Crystal Reports. Before installing Sage Fixed Assets Reporting, we recommend that you make sure version Crystal Reports 2020 is compatible with your other applications that run Crystal Reports.

## Preparing for an Upgrade

Have you backed up your existing data using the application's backup utility? To back up your data, select File/Company Utilities/Backup Company from the menu bar. Note the location of your backup.

## Overview of the Upgrade Process

The upgrade process consists of the following steps:

1. <span>Backing up your current data</span>, on page 33.

2. <u>Upgrading the Sage Fixed Assets server components</u>, on page 34.

3. <u>Setting up the attachments folder for PDFs</u>, on page 36.

4. Optional: <u>Installing the Sage Fixed Assets Reporting server</u>, on page 38.

5. <u>Converting your current data</u>, on page 39.

# Step 1: Backing Up Your Current Data

## To back up your data

1. Select File/Company Utilities/Backup Company from the menu bar. The Backup Company dialog appears.

2. Select the database containing the company or companies you want to back up.



> Note: You can repeat these steps and select a different database if you have multiple databases.

3. Select the company or companies that you want to back up, and then select the Next button.

> Note: Select the Select All button to select all of the companies listed in the Companies field.

4. A dialog that allows you to name and save the backup file appears.

5. Enter a file name and select a location for the backup file, and then select the Backup button. The application saves the backup file and returns to the Backup Company dialog.

6. After the backup is complete, select the Cancel button to close the Backup Companies dialog, or select another company to back up.

# Step 2: Upgrading the Sage Fixed Assets Server Components

In this step, you upgrade the server components on the server machine.

> Note: You must be on the server machine where the previous server components were installed to upgrade the server components. You cannot install the server components from the client machine.

## To upgrade the Sage Fixed Assets server components

1. Sign in to the Sage Knowledgebase.

2. Select the green "Download Sage Fixed Assets" box.

3. Select the link for the latest version of the program.

4. Select the **Download** button and open the downloaded file.

5. Select the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

6. Select OK. The system begins to download the file.

   The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, Microsoft Visual C++ 2017 Redistributable, Microsoft ODBC Driver 17 for SQL Server, Microsoft SQL Server 2016 Management Objects, and Microsoft SQL Server System CLR Types if it is not already installed.

7. Select the Install button. The system installs the required components, and then displays the Welcome dialog. (You may need to restart your machine.)

8. Select the Next button. The License Agreement dialog appears. Read the license agreement, and then select the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, select the No button. The system exits from the installation program.)

9. After you select the Yes button, a message appears indicating that a previous version of the program has been found on your computer.

> Note: If the message does not appear, make sure you are installing the server components on the machine where the previous Sage Fixed Assets server components were installed.

10. Select Yes to remove the previous version of the application. The system begins installing the software, and the Setup Status dialog appears.

    When all files have been installed, a message informs you that the application will launch the Database Utility.

11. Select OK. The InstallShield Wizard Complete dialog appears.

12. Select the Finish button.

> Note: Once the InstallShield Wizard completes, the message below will appear, providing guidance on the next steps for database conversion and client installation. After reviewing the information, select OK to close the message.
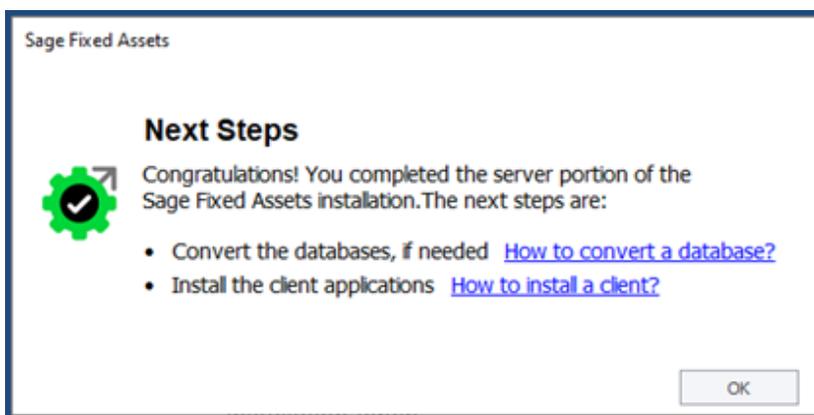


13. The Database Utility dialog appears.

## Step 3: Setting Up the Attachments Folder for PDFs

You can use the Images tab in Asset Detail to attach an image to an asset. The application stores most types of image files in the asset database. However, the application stores Adobe PDF file attachments in a separate folder.

The application creates an Attachments folder during installation. You can find it under C:\SFAServ\COMMON on the server machine. You must specify the path to this folder or to another folder in the Attachments field on the Database Utility.

> Note: Make sure the folder that you select is either shared or underneath a shared folder.

## Setting up the attachments folder

1. On the Database Utility, select the Browse button. The Browse for Folder dialog appears.

2. Select (or create) the folder that will contain the Adobe PDF file attachments.

   > Note: Make sure the folder that you select is either shared or underneath a shared folder.

   The directory path must appear in the format \\COMPUTER NAME\SHARE NAME\folder path. For example, if the computer name is "MYCOMPUTER" and the share name of the SFAServ folder is "SFAServ," then the path to the existing attachments folder would appear as:

   \\MYCOMPUTER\SFAServ\COMMON\Attachments.

3. Enter this path in the Folder field of the Browse for Folder dialog.



4. Select OK to close the Browse for Folder dialog. The selected folder appears in the Attachments Folder field.

   > **Note**: If you have already registered your product and entered your customer number, your customer number is populated in the Sage Advisor Update section. If you have already registered your product and entered your customer number, your customer number is populated in the Sage Advisor Update section. If you just need to update your Customer Number or have not registered, go to **Database Utility> Tools > Registration**, then select **Register** on the Registration Status dialog to complete the registration.
   > For more information about registration and where to find your Customer Number, see Registering the application, on page 19.

5. Select the Exit button to close the Database Utility.

6. The Database Utility - Premier CIP must be launched at least once in order to install the client components. If you see this message, select OK to continue.
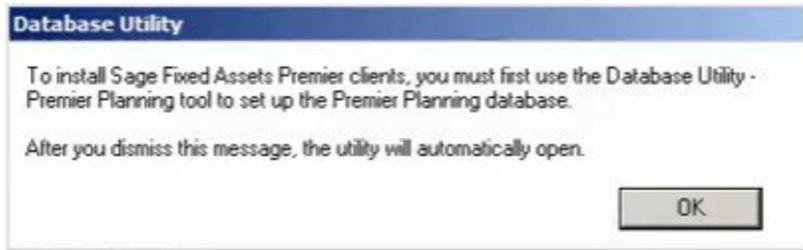


7. Select OK to continue.

8. Select OK to create the System Configuration Database.

# Step 4: Installing the Sage Fixed Assets Reporting Server Components (Optional)

Sage Fixed Assets Reporting enables you to create custom reports. It is a powerful program that allows you to design, create, print, and distribute your custom reports. In this step, you install the Sage Fixed Assets Reporting server on the server machine.

> **Note**: The latest version of Sage Fixed Assets Reporting uses SAP® Crystal Reports 2020 (Crystal Reports). A previous version of Sage Fixed Assets Reporting used Crystal Reports 2016. If both versions of Crystal Reports are on your machine Sage Fixed Assets Reporting will default to Crystal Reports 2020.

> **Note**: Sage Fixed Assets Reporting may not be compatible with other versions of Crystal Reports. Before installing Sage Fixed Assets Reporting, we recommend that you make sure version Crystal Reports 2020 is compatible with your other applications that run Crystal Reports.

## To install the Sage Fixed Assets Reporting server components

1. Sign in to the Sage Knowledgebase.

2. Select the green "Download Sage Fixed Assets" box.

3. Select the link for the latest version of the program.

4. Select the **Download** button and open the downloaded file.

5.  Select the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

6.  Select OK. The system begins to download the file. The system automatically displays the Sage Fixed Assets Reporting Server Welcome dialog. Select the Next button. The Software License Agreement dialog appears.

7.  Read the license agreement, and then select the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, select the No button. The system exits from the installation program.)

    For instructions on installing the Sage Fixed Assets Reporting client components, see Chapter 7, "Installing Sage Fixed Assets Reporting", on page 47.

# Step 5: Converting Your Current Data

As new features and enhancements are added to the program, the system requires additional information to support the new features. This requires that changes be made to your existing asset database so that the system can store the new information. To update your database, you perform a database conversion.

> Note: A database conversion may not be required for the current release. If the program launches and does not prompt you to perform the In-Place Database Conversion, a conversion is not needed for the current database. If it does prompt you for conversion, you can continue and convert the current database, or cancel to use the Database Conversion Utility to convert multiple databases.

You start the database conversion utility by selecting the Convert button on the Database Utility dialog. If you selected to launch the database utility, then you are ready to begin the conversion process. Otherwise, follow the steps below to start the Database Utility.

> Note: A database conversion requires three to four GB of disk space. Make sure you have sufficient disk space before you convert your databases.

## To convert your data

1.  Select the Start button on the Windows taskbar, and then select Programs (or All Programs) from the Start menu.

2.  Select the Sage Fixed Assets program group.

3.  Select the Tools program group.

4.  Select the Database Utility Premier icon. The Database Utility dialog appears.

5. Select the Convert button. The application displays the Conversion Utility Welcome dialog.

6. Select the Next button. The application displays the Conversion Utility Select Databases dialog.
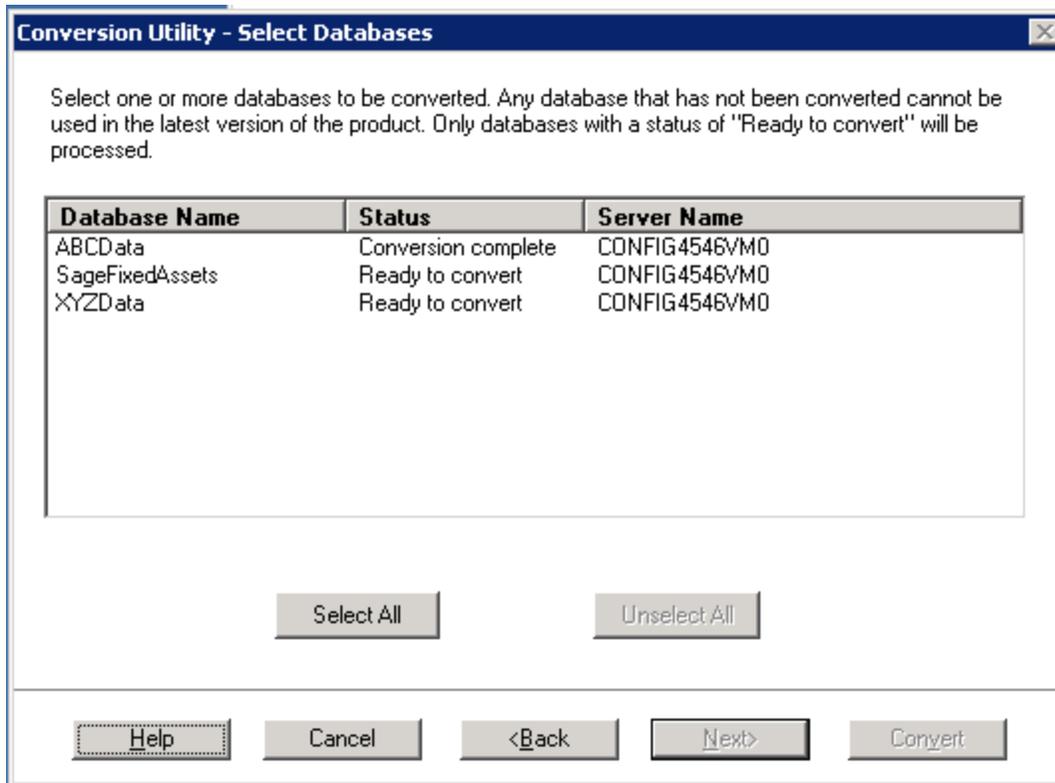
This dialog displays the status of each database.

- **Conversion Complete**

   This status indicates that the database has already been converted to the latest version.

- **Ready to Convert**

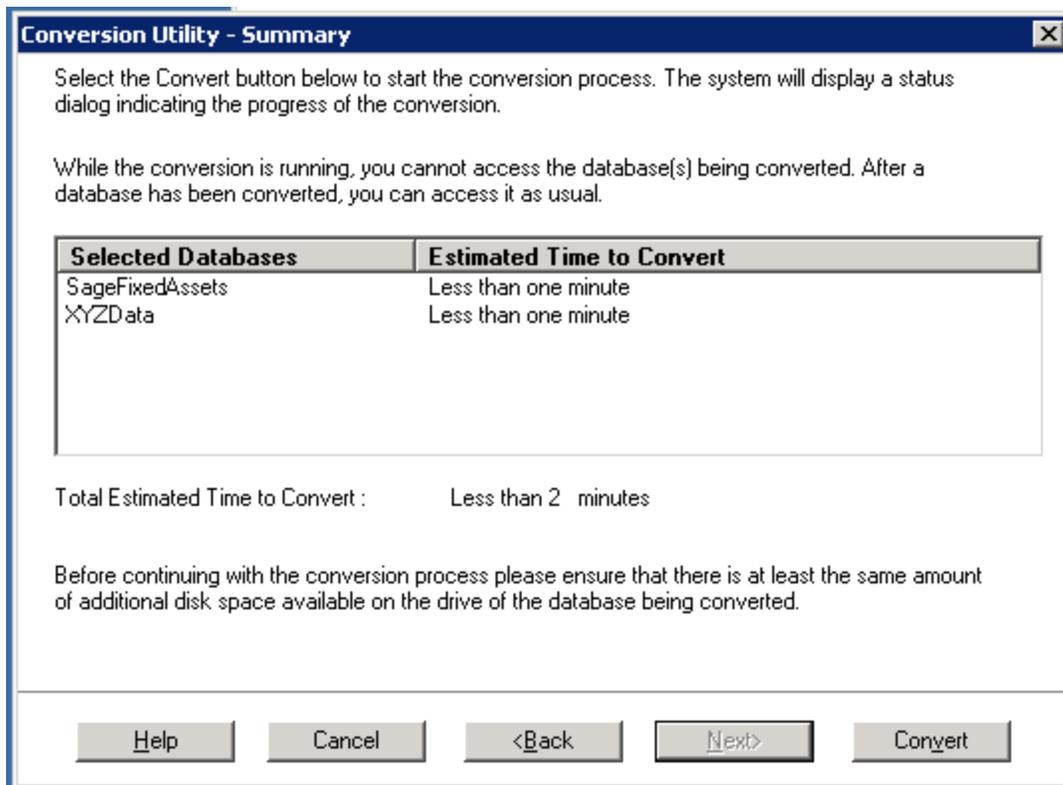   This status indicates that the database is ready to be converted to the latest version.

- Incompatible Version

   This status indicates that the database cannot be converted because the database version is incompatible with the latest version of the application. For assistance in converting your databases, please contact Sage Fixed Assets Customer Support.

- **Cannot Open**

   This status indicates that the database cannot be converted for an unknown reason. The database may have been moved and the system cannot locate it, or the database may be corrupted. For assistance in resolving the problem, please contact Sage Fixed Assets Customer Support.

7. Select the database(s) that you want to convert, and then select the Next button.

**Conversion Utility – Summary**  ☒

Select the Convert button below to start the conversion process. The system will display a status dialog indicating the progress of the conversion.

While the conversion is running, you cannot access the database(s) being converted. After a database has been converted, you can access it as usual.

| Selected Databases | Estimated Time to Convert |
|---|---|
| SageFixedAssets | Less than one minute |
| XYZData | Less than one minute |

Total Estimated Time to Convert :        Less than 2   minutes

Before continuing with the conversion process please ensure that there is at least the same amount of additional disk space available on the drive of the database being converted.

| Help | Cancel | <Back | Next> | Convert |
|---|---|---|---|---|

8. Review the Conversion Utility Summary dialog, and then select the Convert button. The application begins to convert the database(s) and displays a Conversion Status message box. When the conversion is complete, the application displays a "Conversion Complete" message in the Additional Information text box.
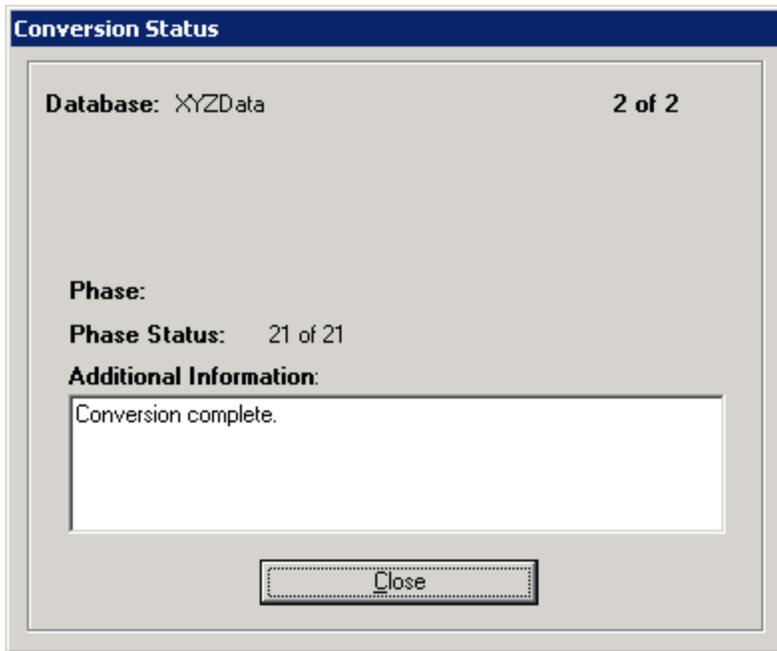
9. Select the Close button. The application displays a report in your browser window which indicates how many databases have been converted.



You are now ready to open the database in the latest version of the application.

# Chapter 5 Upgrading Sage Fixed Assets Premier Client

This chapter describes the steps for upgrading from a previous version of Sage Fixed Assets— Premier Depreciation.

## Upgrading the Client Components

> Important: The Sage Fixed Assets Premier client installation cannot be completed until the Database Utility for Premier Depreciation & Tracking and the Database Utility for Premier CIP have been launched at least once.

Follow the steps below on each workstation on which you will run the network application. You can also upgrade the client application on the server for testing purposes.

### To upgrade a client on a workstation

1. Do one of the following:

   - Go to My Computer and browse to the network drive for the Premier Server. Locate the folder in which you installed the server components (FASServ, BESTSERV, and SFAServ are the defaults), and double-click the SETUP.EXE file in the Premier Client subfolder.

   - Select Start/Run from the Windows taskbar. The Run dialog appears. In the Run dialog, enter the UNC path (\\Servername\Foldername) to the folder containing the server components.

   - In the Run dialog, enter the mapped drive path to the folder (for example, Z:\SFAServ\Premier Client\SETUP.EXE.

     (Substitute your network drive letter for "Z" if it is different.)

   > Note: If you mapped the Z: drive to \FASServ, \BESTSERV, or \SFAServ, then the path would be: Z:\Premier Client\SETUP.EXE

   > Note: The SETUP.EXE file is located on the machine on which you installed the server components.

2. Select OK. The system begins to download the file. The system prompts you to install Sage Advisor Update, Sage SBDDesktop, Microsoft .NET Framework, Microsoft Visual C++ 2017 Redistributable, Microsoft ODBC Driver 17 for SQL, Microsoft Visual C++ 2015 2022 Redistributable Package and Microsoft Visual C++ 2015 Redistributable if it is not already installed.

3. Select the Install button. The system installs the required components, and then displays the Welcome dialog. (You may need to restart your machine.)

4. Select the Next button. The Software License Agreement dialog appears. Read the license agreement, and then select the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, select the No button. The system exits from the installation program.)

   After you select the Yes button, a message appears indicating that a previous version of the program has been found on your computer.

5. Select Yes to remove the previous version of the application. The system removes the prior version and begins installing the software, and the Setup Status dialog appears.

When all files have been installed, the InstallShield Wizard Complete dialog appears.

If the installation program determines that you need to restart your computer before you use the program, it displays two options on the InstallShield Wizard Complete dialog. You can either allow the system to restart your computer immediately, or you can restart your computer at a later time.

> Tip: We recommend that you allow the system to restart your computer at this time if prompted to do so.

6. Select the Finish button.

# Starting the Application

Follow the steps below to start the application from a workstation.

> Note: You can start the program by double-clicking the icon on your desktop.

## To start the application from a workstation

1. Select Start/Programs (or All Programs) from the Windows taskbar.

2. Select the Sage Fixed Assets program group.

3. Select the appropriate icon.

## Finding your customer number

Your customer number is available in several places:

- In the email from Sage confirming your Sage Fixed Assets order.

- On the invoice for your Sage Fixed Assets order.

- On the Register Window (**Help > Registration > Register**) if you have previously registered.

- On the About Window (**Help > About Sage Fixed Assets**) if you have previously registered.

- From your Sage Account Manager at 800-368-2405.

After you have registered your product, your customer number can also be found at **Help > Update User Information**.

You will need your Customer Number when contacting Sage for assistance.

# Chapter 6 Installing Sage Fixed Assets Reporting

Sage Fixed Assets Reporting enables you to create custom reports. It is a powerful program that allows you to design, create, print, and distribute your custom reports.

> **Note**: The latest version of Sage Fixed Assets Reporting uses SAP® Crystal Reports 2020 (Crystal Reports). A previous version of Sage Fixed Assets Reporting used Crystal Reports 2016. If both versions of Crystal Reports are on your machine Sage Fixed Assets Reporting will default to Crystal Reports 2020.

> **Note**: Sage Fixed Assets Reporting may not be compatible with other versions of Crystal Reports. Before installing Sage Fixed Assets Reporting, we recommend that you make sure Crystal Reports 2020 is compatible with your other applications that run Crystal Reports.

## Installing the Latest Version

Before you begin to install the application, you should do the following:

- Close all other Windows programs.

- Close all tool bars on your computer's desktop (such as the Microsoft Office tool bar).

- Close all programs that run in the background after you start your computer (such as virus-checking programs).

- Make sure you have **Administrative rights** to the local computer.

When installing the application, we recommend you accept the default options and directory locations the installation program provides. However, you can customize the installation to suit your needs by choosing the components you want to install.

### To install Sage Fixed Assets Reporting

1. In Windows Explorer double-click the SETUP.EXE file in the SFAServ\Crystal2020 folder.

   - The default directory path is Z:\SFAServ\Crystal2020\. (Substitute your network drive letter for "Z" if it is different.)

> Note: If you mapped the Z: drive to \SFAServ, then the path would be:
> Z:\Crystal2020\SETUP.EXE.
> The SETUP.EXE file is located on the machine on which you installed the server components.

> Note: The SFA reporting server must be installed in order to install Sage Fixed Asset Reporting.
> For more information, see

1. Select Next on the Check Prerequisites dialog. The **Welcome** dialog appears.
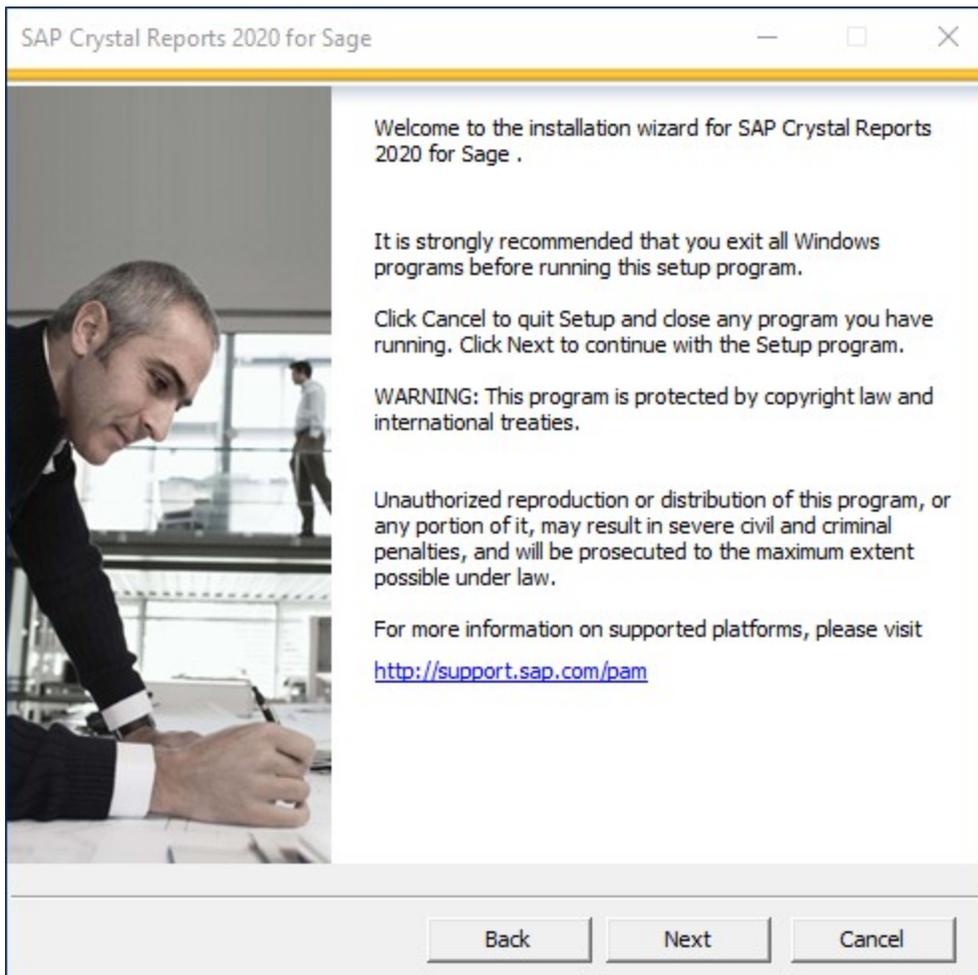


2. Select the **Next** button. The system displays the **License Agreement**.

3. Select the **I Accept the License Agreement** option and then select the **Next** button. The system displays the **Select Install Type** dialog.
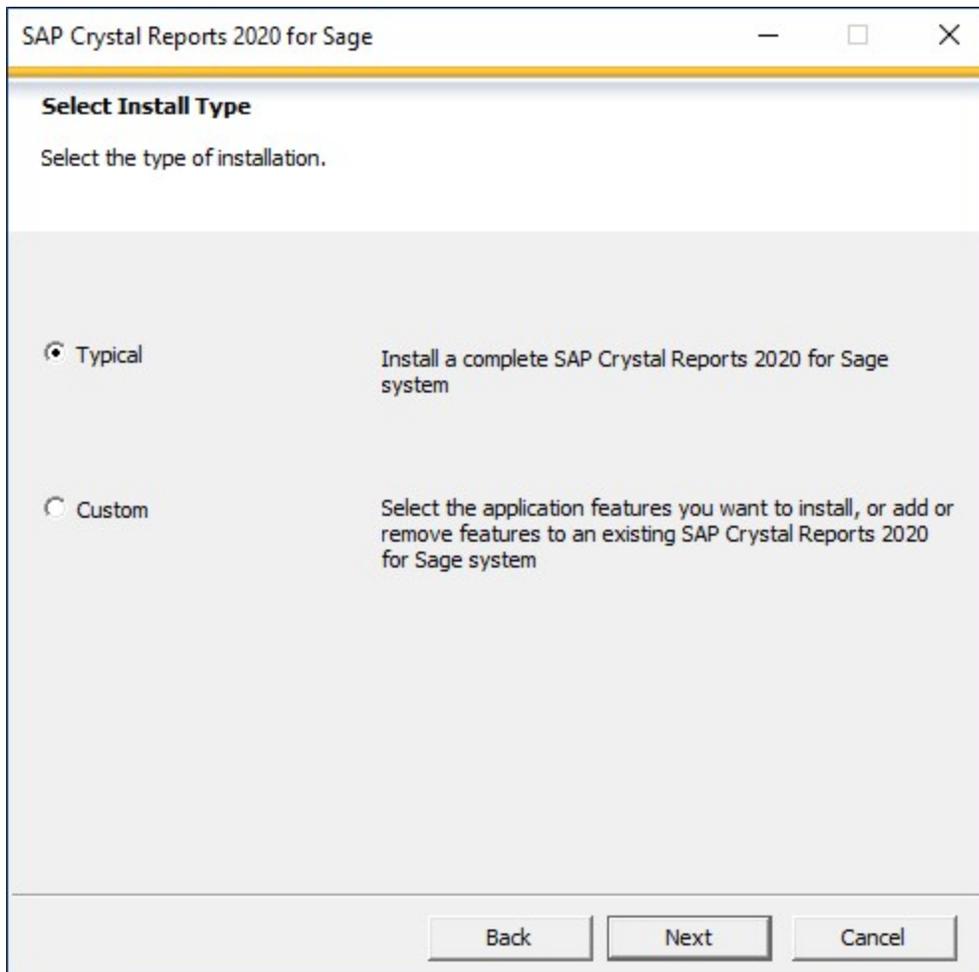
4. Leave the **Typical** option selected, and then select the **Next** button. The system displays the **Start Installation** dialog.

5. Select the **Next** button. The system begins installing the program and displays the installation progress dialog.
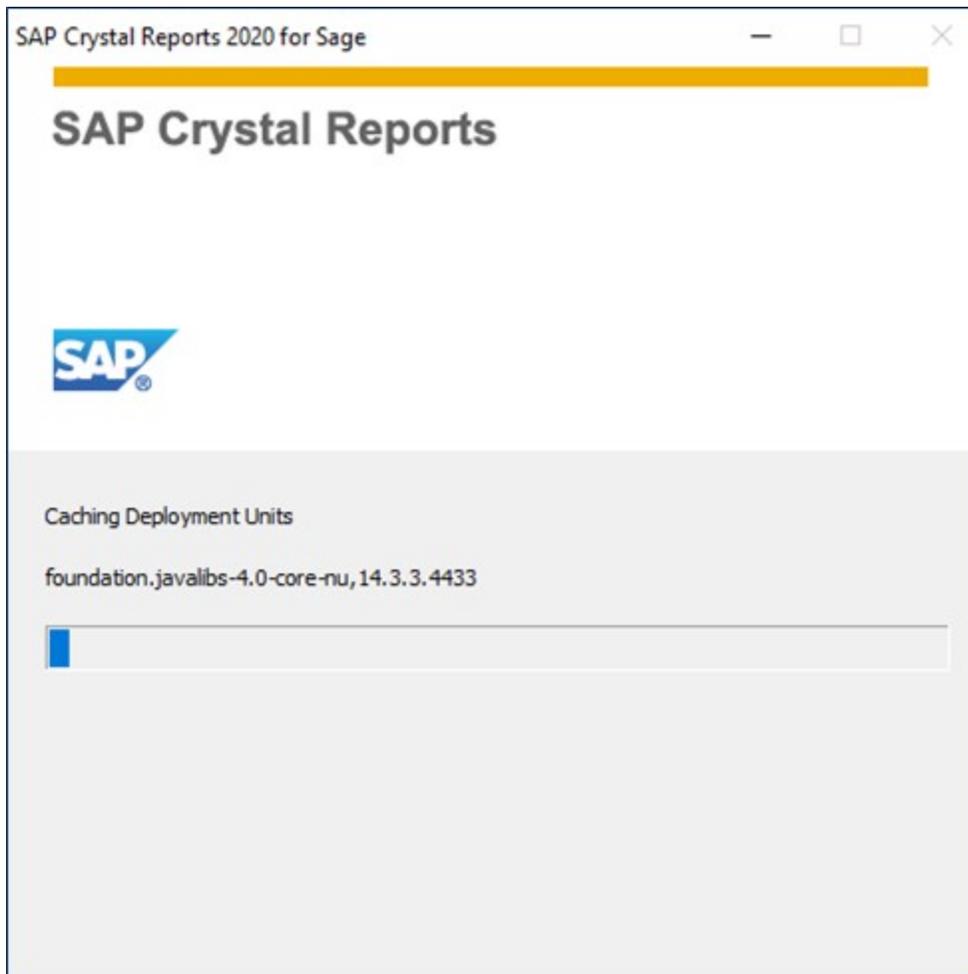
6. When the installation is complete, a message indicates the installation has been completed successfully.

7. Select the **Finish** button.

You are now ready to begin using Sage Fixed Assets application and creating custom reports with Sage Fixed Assets Reporting. For information on using Sage Fixed Assets Reporting, see the online Sage Fixed Assets Reporting User's Guide.

# Chapter 7 Using a Barcode Scanner

Sage Fixed Assets–Premier Tracking enables you to conduct inventories of your assets using a Barcode Scanner.

The Sage Fixed Assets Scanner app provides an efficient way to complete inventories using an Android Barcode Scanner. You can find the Sage Fixed Assets Scanner app in the Google Play Store.

For more information see the Sage Fixed Assets Scanner FAQs at the following link: https://us-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=225924350084158

# Chapter 8 Installing in a Microsoft Windows Terminal Server Environment

To manage fixed assets at a central location and provide remote users with access to fixed asset data, you can install the application on a Windows Terminal Server (WTS) environment.

The Sage Fixed Assets application works best in a Windows Terminal Server environment when you install it in a "three-tiered" configuration; that is, where the Database Server and the Client are on separate servers.

## Three-tiered Environment
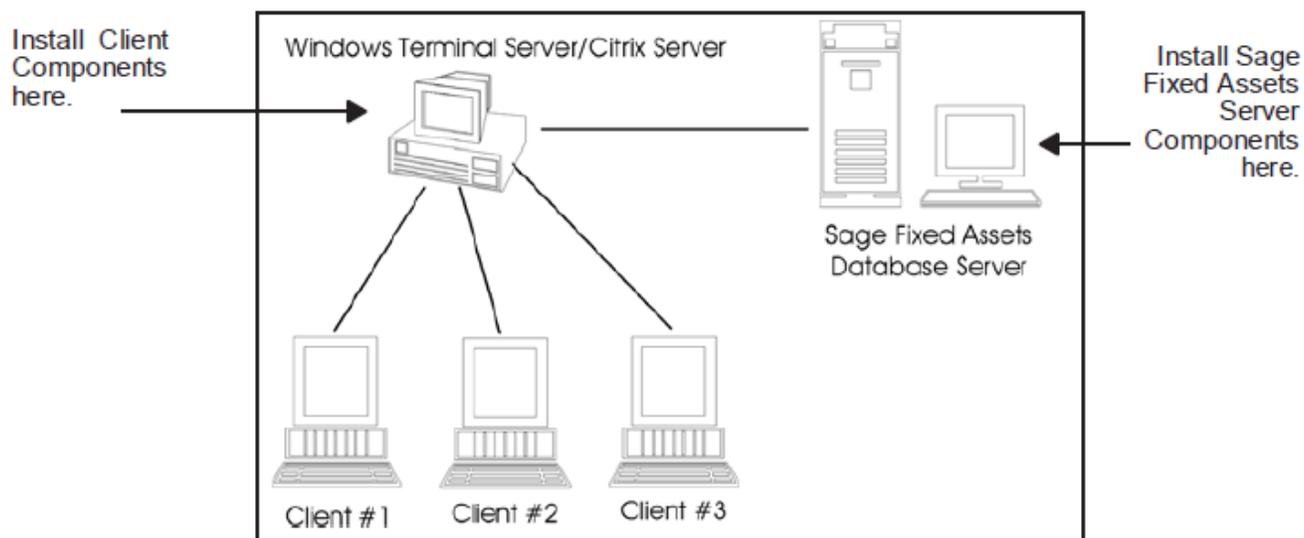


## To install in a three-tiered environment

Perform these steps on the Database Server:

1. Perform the network server installation on the server that will run the database engine.

2. Share the SFAServ directory so that you can perform the client installation on the Windows Terminal Server.

Perform these steps on the WTS:

1. Map a drive to the shared directory SFAServ on the Database Server. Windows Server 2008:

   Select the Install Application on Remote Desktop Server.

2. Select the Browse button and select the SETUP.EXE file in the SFAServ\Network Client folder on the server.

3. On the Run Installation Program dialog, select the Next button. The Sage Fixed Assets client installation dialog appears.

4. Follow the instructions on the installation dialogs. After you install the client components, the After Installation dialog appears.

5. After the installation is complete, select the Next button. The Finish Administration Install dialog appears.
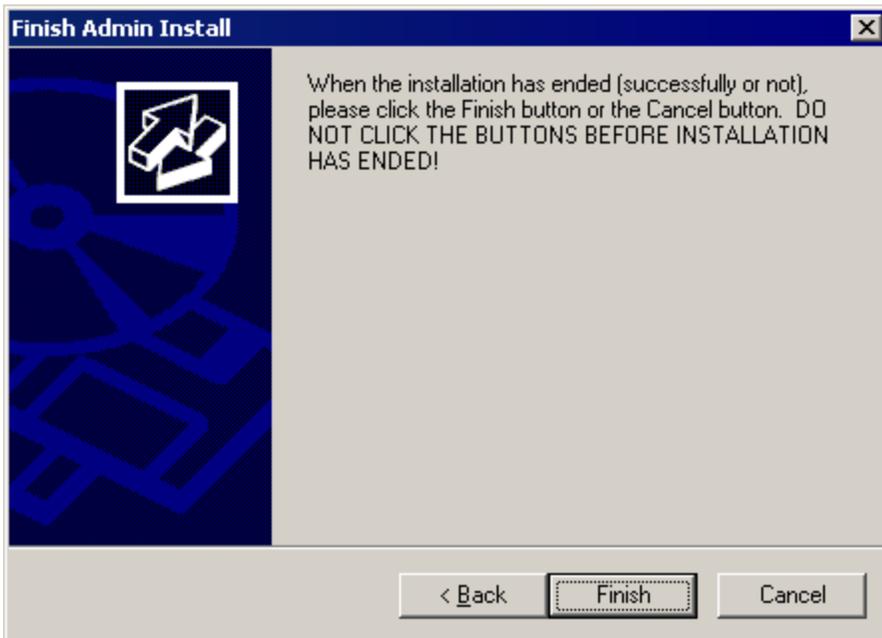


IMPORTANT: Do **NOT** select the Finish button before the installation has completed!

6. Select the Finish button.

   You are now ready to set up the client workstations. For instructions on installing the Sage Fixed Assets Premier client components, see

   For information on setting up your client workstations to run the application, please refer to your Microsoft Terminal Server documentation.