



Sage Fixed Assets

for Depreciation, Tracking, Planning, and Reporting

Installation 2015.1 Single User Guide

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Sage Fixed Assets

Installation Guide

Version 2015.1

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Chapter 1

Introduction

This guide provides the information necessary for installing the following programs:

- Sage Fixed Assets—Depreciation
- Sage Fixed Assets—Tracking
- Sage Fixed Assets—Planning
- Sage Fixed Assets—Reporting.

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.

System Requirements

Before installing Sage Fixed Assets, review the [System Requirements: Sage Fixed Assets v2015.1 Single User](#) article in the Sage Knowledgebase for the latest system requirements. The requirements listed are the *minimum* requirements. As is true of most software programs, enhancing your hardware and system software may improve performance.

Security Requirements

The following rights are required to install the Sage Fixed Assets programs properly.

Installation

The person installing the program must have **Administrative** rights to the local computer.

Chapter 2

Installing Sage Fixed Assets—Depreciation the First Time

In this chapter:

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This chapter provides instructions for users who have never installed Sage Fixed Assets—Depreciation before. If you are currently using Sage Fixed Assets—Depreciation, please see Chapter 3, “Installing Sage Fixed Assets—Depreciation: Upgrading from a Prior Version.”

Overview of the Install Process

The install process consists of the following steps:

1. Installing the latest version, [page 2-1](#).
2. Registering the application, [page 2-7](#).
3. Starting the program, [page 2-9](#).

Step 1: Installing the Latest Version

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

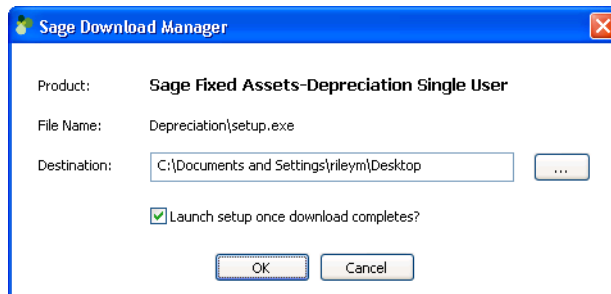
- Close all other Windows programs.
- Close all tool bars on your computer’s desktop (such as the Microsoft Office tool bar).
- Close all programs that run in the background after you start your computer (such as virus-checking programs).
- Make sure you have **Administrative rights** to the local computer.

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.

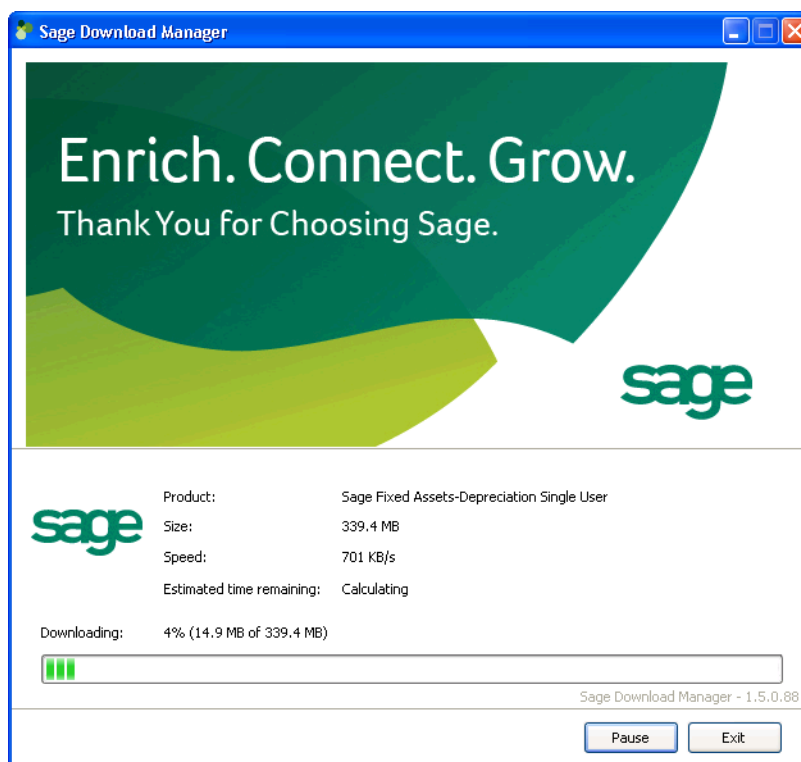
To start the install program

1. Point your browser to the Sage Customer Portal at:
<https://customers.sagenorthamerica.com>.
2. Click the Logon link and enter your Customer Logon information.
3. Click the Product Downloads link. The system opens a web page with downloads for system requirements, Sage Fixed Assets products, and their installation guides.

4. Click the Download link for the Depreciation Stand-Alone Desktop Edition.
5. Click the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

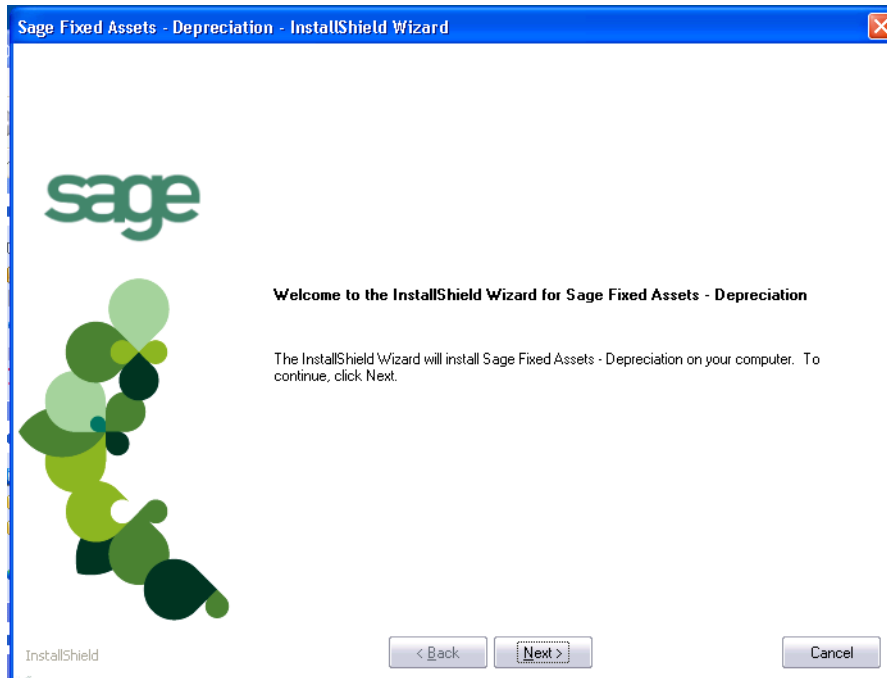


6. Click OK. The system begins to download the file.

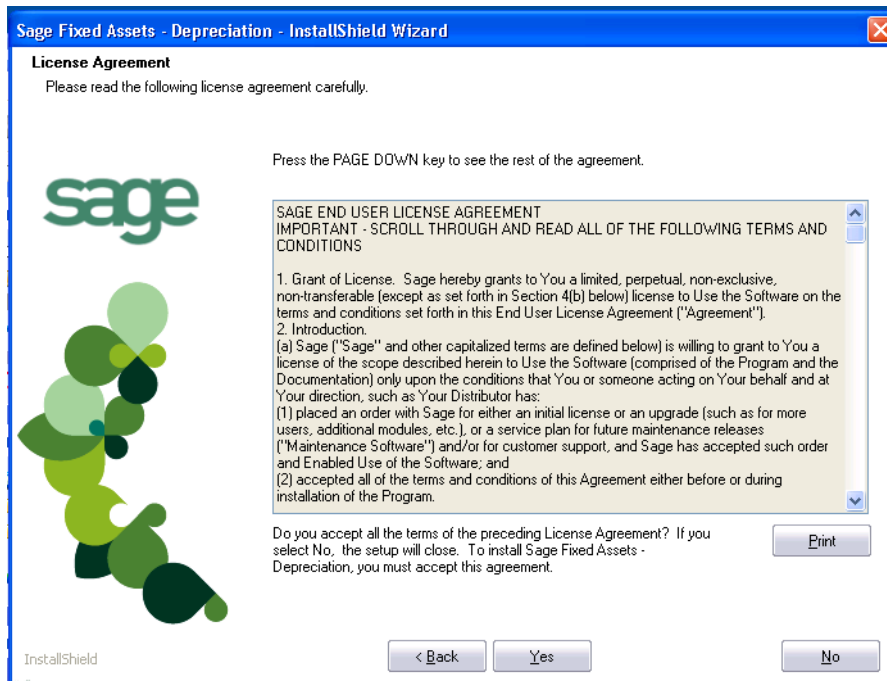


The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, and Microsoft Visual C++ 2005 Redistributables if it is not already installed.

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



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



■ **Print Button**

Click this button to send the license agreement to the default printer.

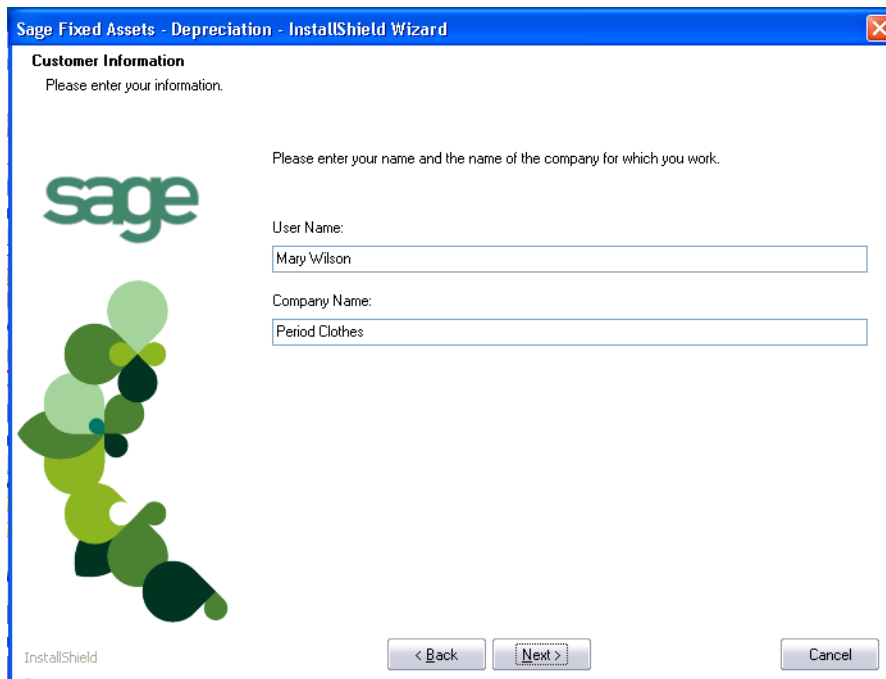
9. Read the license agreement, and then click the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, click the No button. The system exits from the installation program.)

10. After you click the Yes button, the Select Options dialog appears.

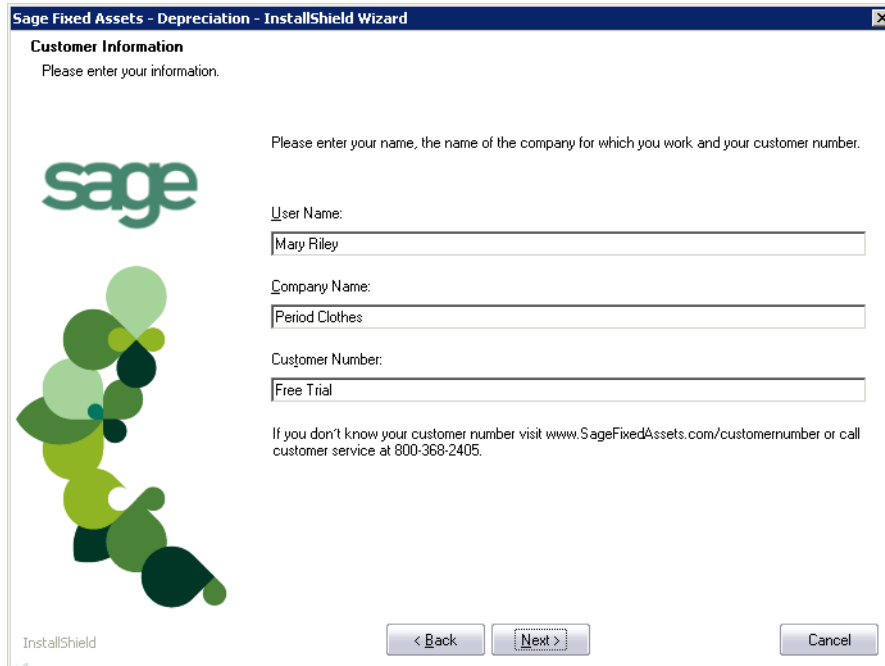


11. Select either the 30-day free trial option or the purchased option.

If you selected the 30-day free trial option, the following Customer Information dialog appears.



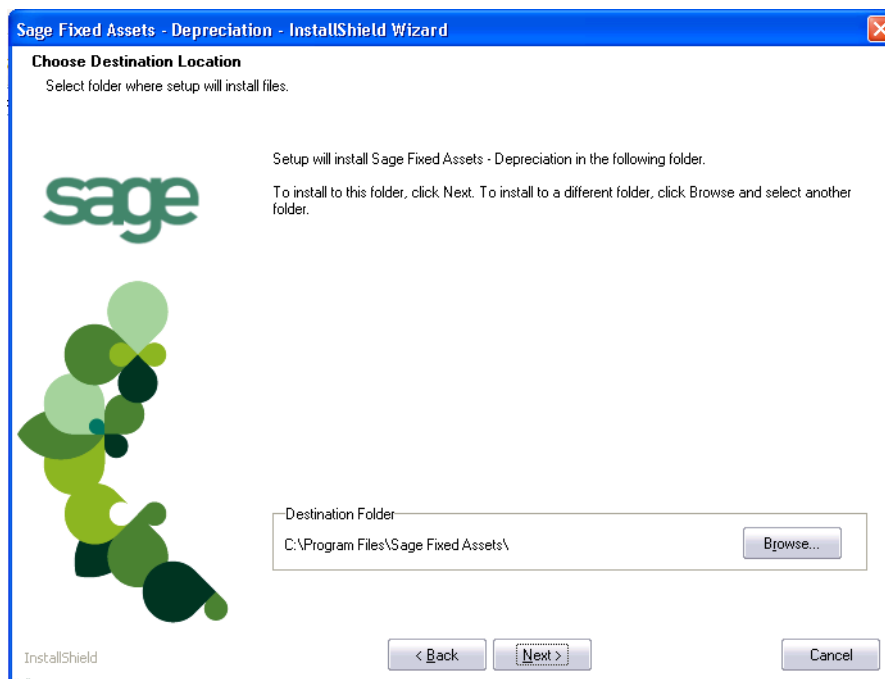
If you selected the purchased option, the following Customer Information dialog appears.



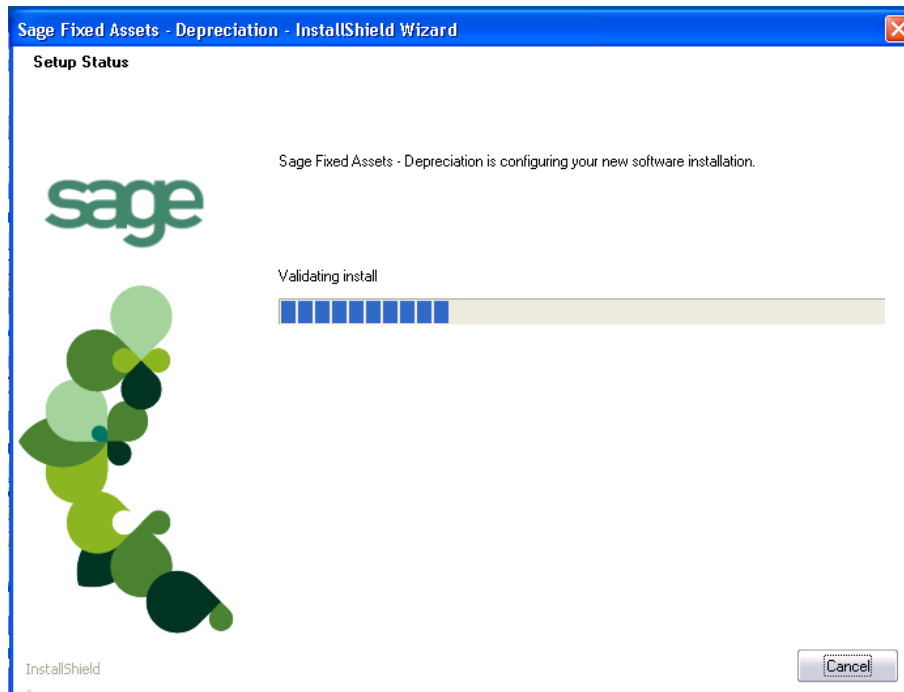
12. Enter your name, company name, and customer number if required. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

Note: You can find the customer number on the packing slip. If you cannot find your customer number, call Customer Service at 800-368-2405.

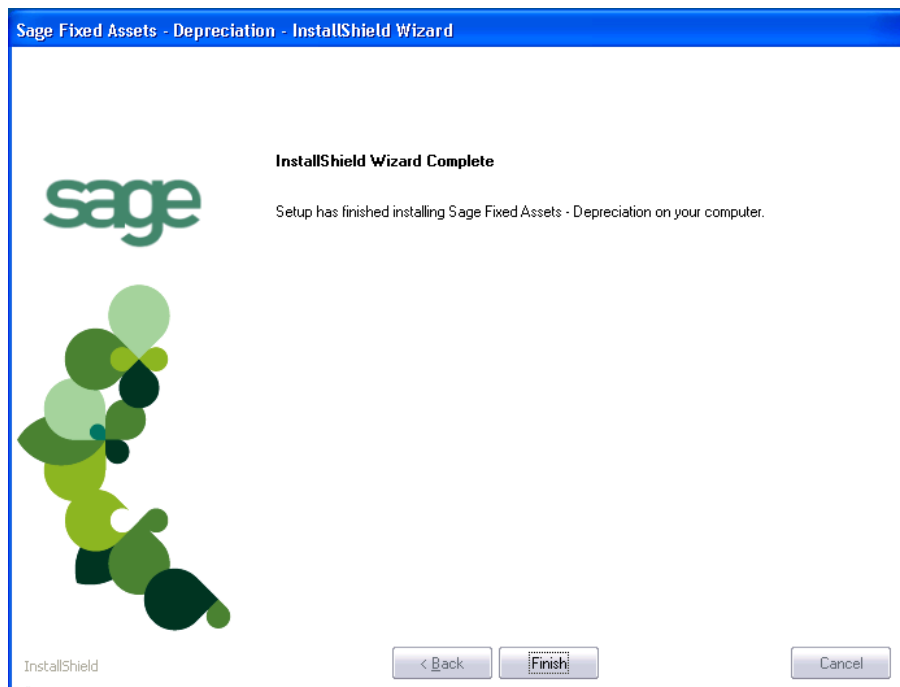
13. Click the Next button. The Choose Destination Location dialog appears.



14. Click the Next button. The system begins installing the software, and the Setup Status dialog appears.



When all of the 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.

15. Click the Finish button. The system returns to the Sage Fixed Assets installation dialog.

Step 2: Registering the Application

The process of registering the application is a one-time event. After you enter your registration codes, you won't have to enter them again—not even when you receive your next program update.

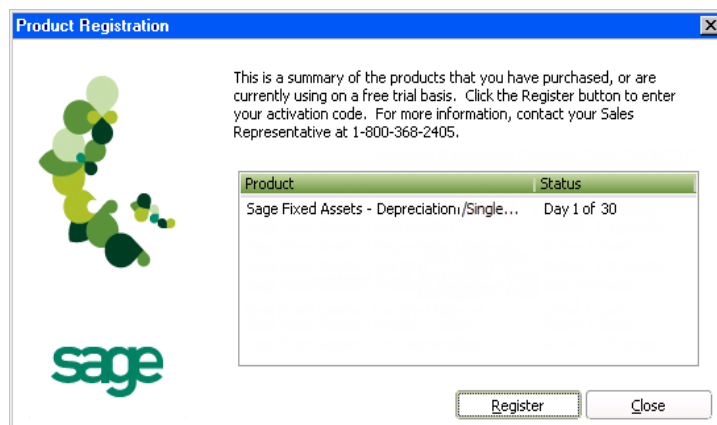
Note: You have 30 days to register the application.

To register the application

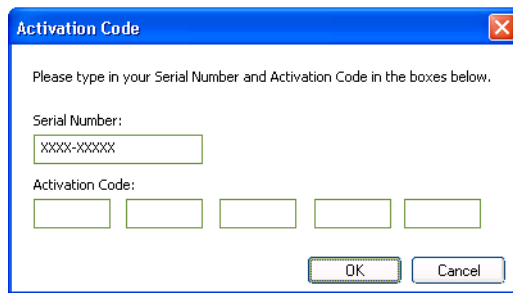
1. Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
2. Select the Sage Fixed Assets program group.
3. Select the Depreciation icon. A message appears indicating you can use the application for 30 days.



4. Click the Next button. The Product Registration dialog appears.



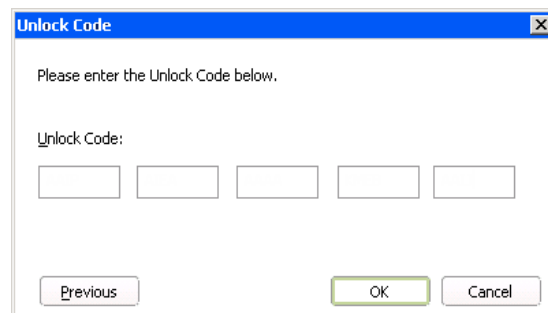
5. Click the Register button. A registration dialog appears allowing you to enter your Serial Number and Activation Code.



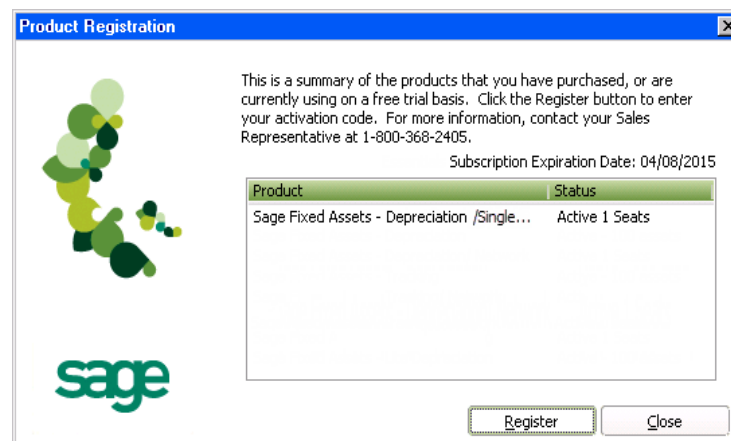
- **Serial Number**
Enter your serial number. **You must enter the hyphen.**
- **Activation Code**
Enter your activation code.

Please contact Customer Service at 800-368-2405 if you cannot find your serial number and activation code.

6. If you are a Subscription customer, the Unlock Code dialog opens. Enter your unlock code in the Unlock Code field.



7. Click OK. The system returns to the Product Registration dialog, where the product is listed as Active. If you are a Subscription customer, you will see the subscription expiration date.

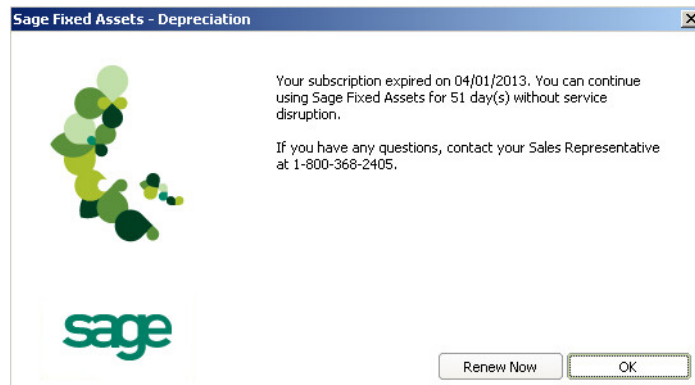


Product	Status
Sage Fixed Assets - Depreciation /Single...	Active 1 Seats

8. Click the Close button.

Using an Expired Subscription

If your subscription expires, the dialog below displays when you open your product.



You can continue to use these features for up to 120 days after the expiration date; *Open Company*, *Custom Export*, *Excel Export*, *Open/Print Reports*, and *Print Asset List*.

If your subscription is expired and you exceed the 120 day grace period, the dialog below displays when you open your product. Click **Renew Now** to open the Product Registration dialog and then follow the steps in "Registering the Application," above.



Step 3: Starting the Application

The Depreciation program icon appears in the Sage Fixed Assets program group by default.

Note: You can also start the application by double-clicking the icon on your desktop.

To start the application

Starting the purchased version:

1. Click 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 from the Programs submenu.
3. Select the Depreciation icon. The system opens the application and displays the main window.

Starting the free trial version:

1. Click 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 from the Programs submenu.
3. Select the Depreciation icon. A message appears indicating you have 30 days to try the program.



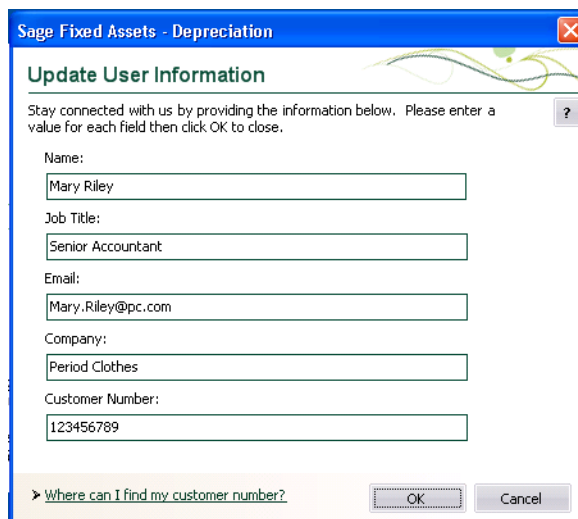
4. Click the Register Later button.

The system opens the application and displays the main window.

To update your customer number

After you purchase the application, you will receive a customer number. You can enter your customer number so that it will be available if you need to call Customer Support with a question.

1. Select Help/Update User Information from the menu bar. A dialog appears that allows you to enter your customer number.



2. Enter your name, company name, and customer number, and then click OK.

To view your customer number

When you call Customer Support with a question, you will need your customer number. Follow the steps below to view your customer number.

1. Select Help/About Depreciation from the menu bar. A dialog appears that provides information about your program, including your customer number.

Chapter 3

Installing Sage Fixed Assets—Depreciation: Upgrading from a Prior Version

In this chapter:

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Step 2: Installing the Latest Version	3-2
Step 3: Converting Your Data	3-7
Step 4: Starting the Application	3-13

This chapter provides instructions for upgrading from a previous version of Sage Fixed Assets—Depreciation.

Previous Versions Compatible with the Latest Version

You must be currently using the prior version of Sage Fixed Assets—Depreciation 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 2011 (Crystal Reports), which requires 2 GB of hard disk space. A previous version of Sage Fixed Assets—Reporting used Crystal Reports XI. If this version of Crystal Reports is still on your machine, we recommend that you uninstall it to avoid conflicts with the latest version.

Overview of the Upgrade Process

The upgrade process consists of the following steps:

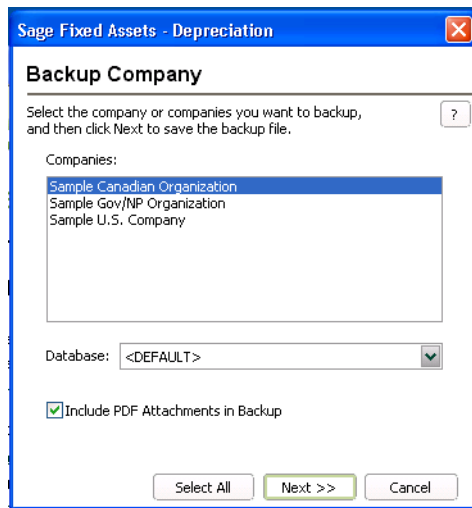
1. Backing up your current data, [page 3-1](#).
2. Installing the latest version, [page 3-2](#).
3. Converting your current data, [page 3-7](#).
4. Starting the application, [page 3-13](#).

Step 1: Backing Up Your Data

After you install the latest Sage Fixed Assets version, you cannot open your companies in a previous version of the application. You may want to back up your data before you install the latest version, in case you need to go back to a previous version.

To back up your database

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



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 companies in multiple databases.

3. Select the company or companies that you want to back up.

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

4. Click the Next button, and designate the destination directory, enter a file name for the backup file, and then click the Backup button.
5. After the backup is complete, click the Cancel button to close the Backup Company dialog, or select another company to back up.

Step 2: Installing the Latest Version

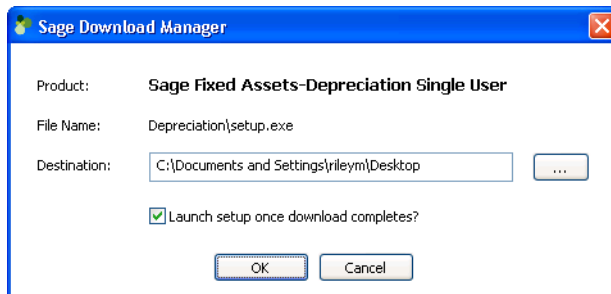
Before you begin to install the application, you should do the following:

- 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.

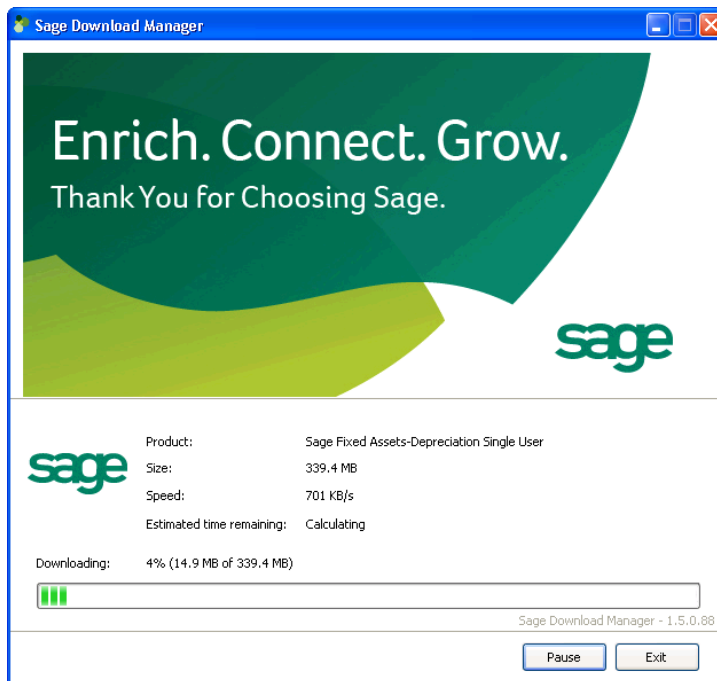
When installing the application, we recommend you accept the default options and directory locations the installation program provides. However, you can customize the installation to suit your needs by choosing the components you want to install.

To start the install program

1. Point your browser to the Sage Customer Portal at:
<https://customers.sagenorthamerica.com>.
2. Click the Logon link and enter your Customer Logon information.
3. Click the Product Downloads link. The system opens a web page with downloads for system requirements, Sage Fixed Assets products, and their installation guides.
4. Click the Download link for the Depreciation Stand-Alone Desktop Edition.
5. Click the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

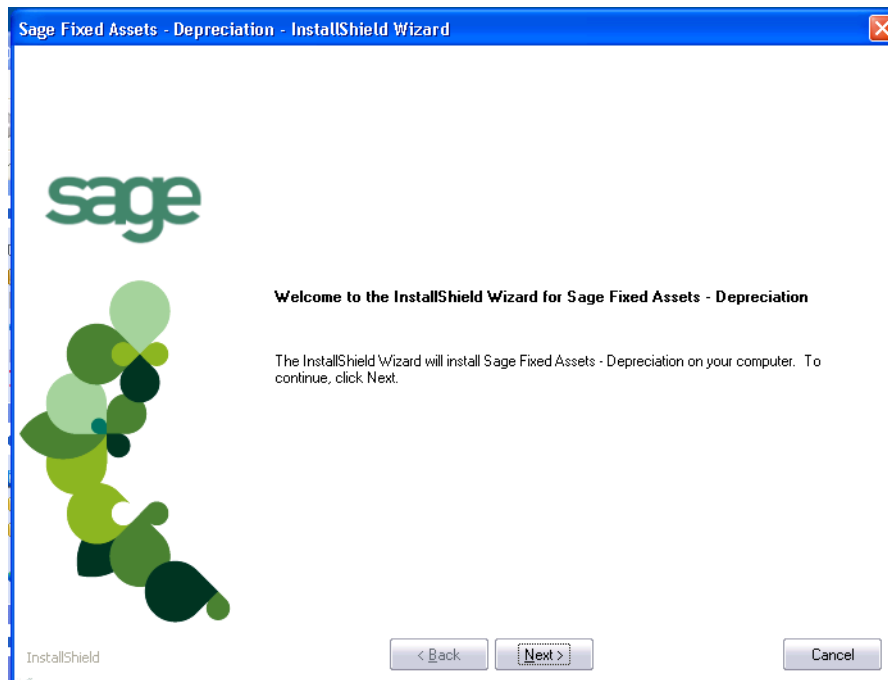


6. Click OK. The system begins to download the file.

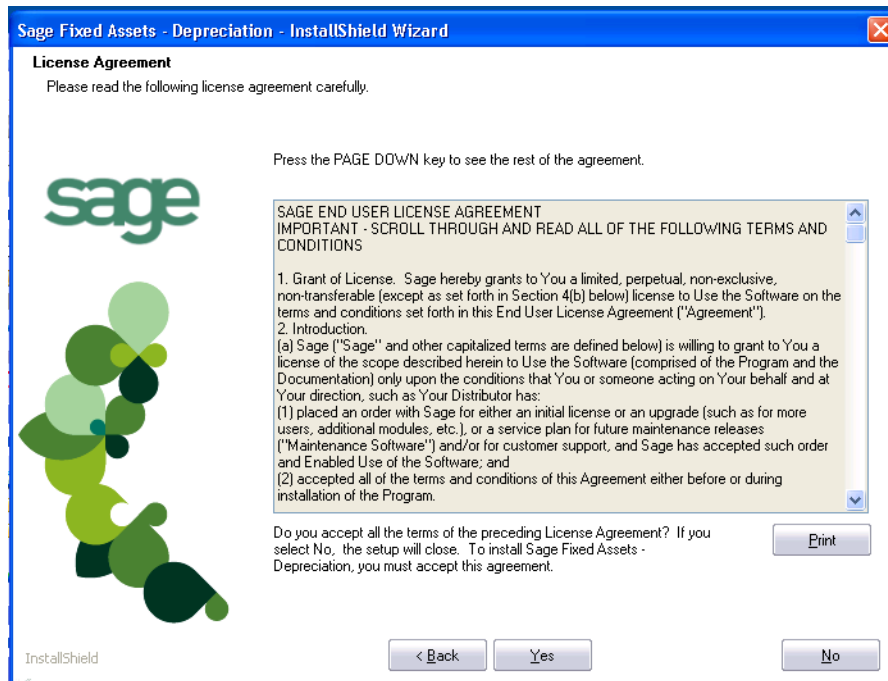


The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, and Microsoft Visual C++ 2005 Redistributables if it is not already installed.

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



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



■ **Print Button**

Click this button to send the license agreement to the default printer.

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

10. After you click the Yes button, the Customer Information dialog appears.

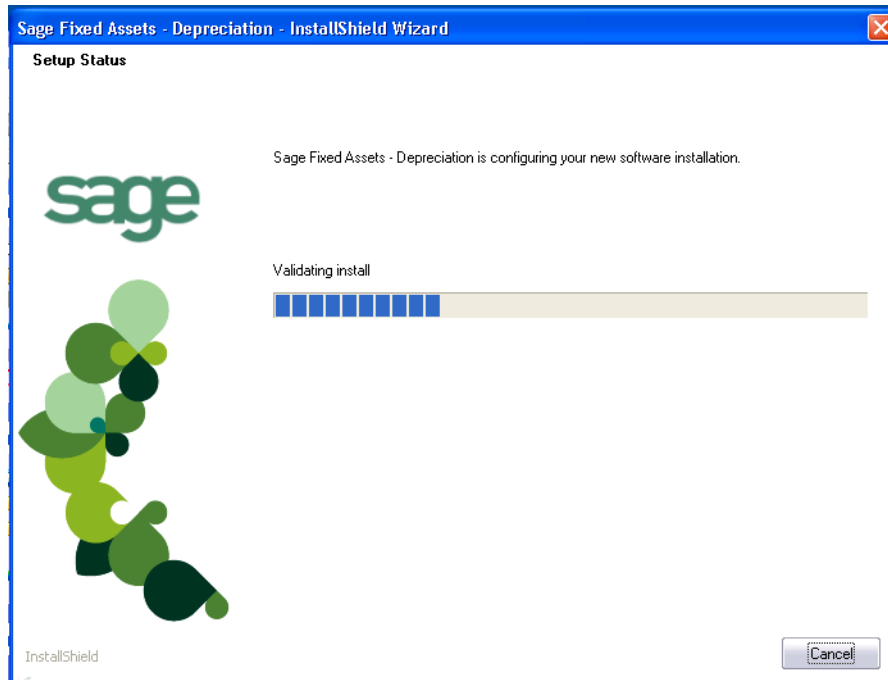
11. Enter your name, company name, and customer number. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

Note: You can find the customer number on the packing slip in the upgrade package or by clicking About Depreciation from the Help menu. If you cannot find your customer number, call Customer Service at 800-368-2405.

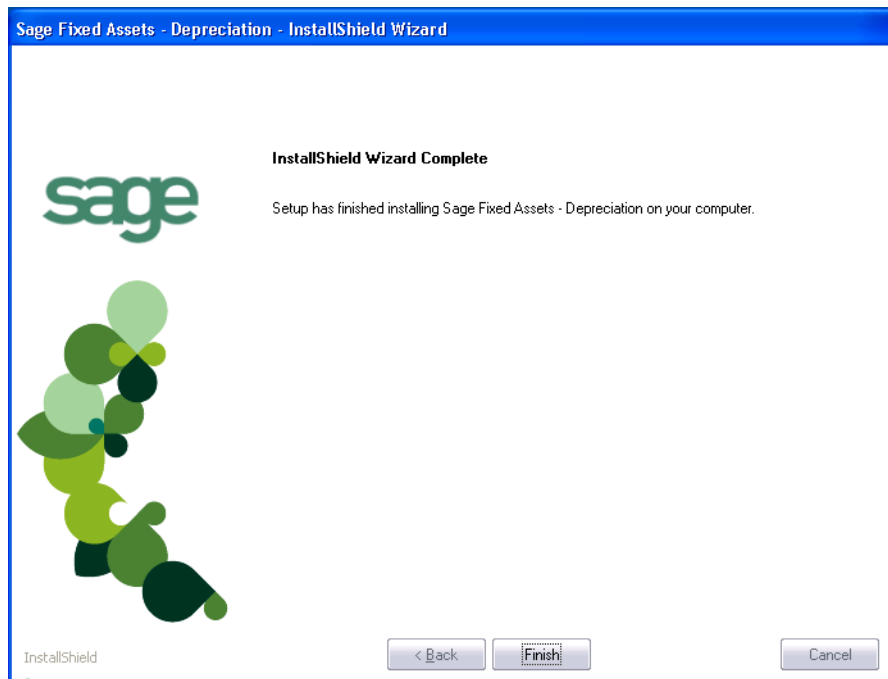
12. Click the Next button. A message appears indicating that a previous version of the program has been found on your computer.

13. Click Yes to remove the prior version of the application. The system begins installing the software, and the Setup Status dialog appears.

3 Installing Sage Fixed Assets—Depreciation: Upgrading from a Prior Version Step 2: Installing the Latest Version



When all of the 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.

- Click the Finish button. The system returns to the Sage Fixed Assets installation dialog.

Step 3: Converting Your 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 asset database so that the system can store the new information. To update your database(s) to hold the new information, you must perform a database conversion.

Note: You must be currently using a version of Sage Fixed Assets—Depreciation that is compatible with the latest version to follow the steps in this section. For information about which versions are compatible with the latest version of the application, see [“Previous Versions Compatible with the Latest Version,”](#) page 3-1.

You have two options for converting your databases.

- **Database Conversion Utility:** You can use the utility to convert two or more databases at a time. You run the utility from the Sage Fixed Assets program group.
- **In-place Database Conversion:** You perform this type of database conversion when you open a database. You can convert only one database at a time with this type of conversion.

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

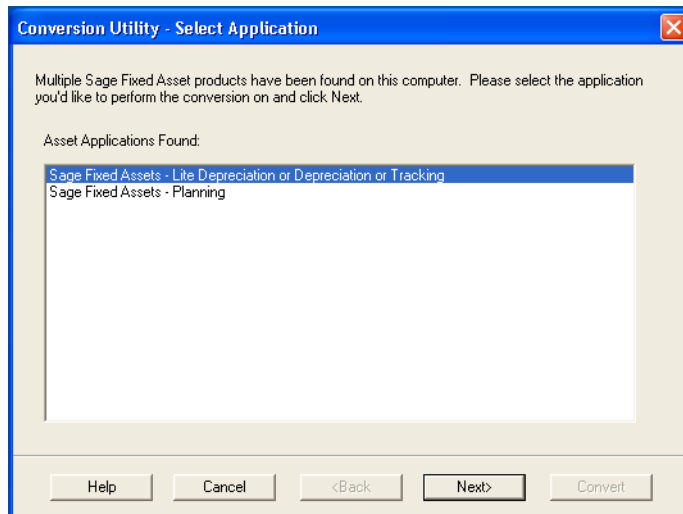
Converting a database is a time-consuming process. Please refer to the table below, which outlines the recommended conversion procedure:

Number of Databases	Number of Assets	Recommended Conversion Program
1	less than 3,000	In-place Database Conversion
1	3,000 or more	Database Conversion Utility
more than 1	any number	Database Conversion Utility

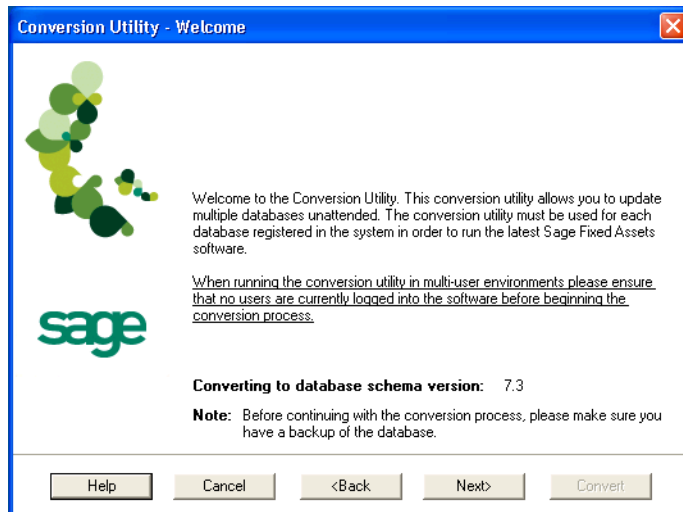
To use the Database Conversion Utility to convert databases

- Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
- Select the Sage Fixed Assets program group.
- Select the Tools program group.
- Select the Conversion Utility icon.

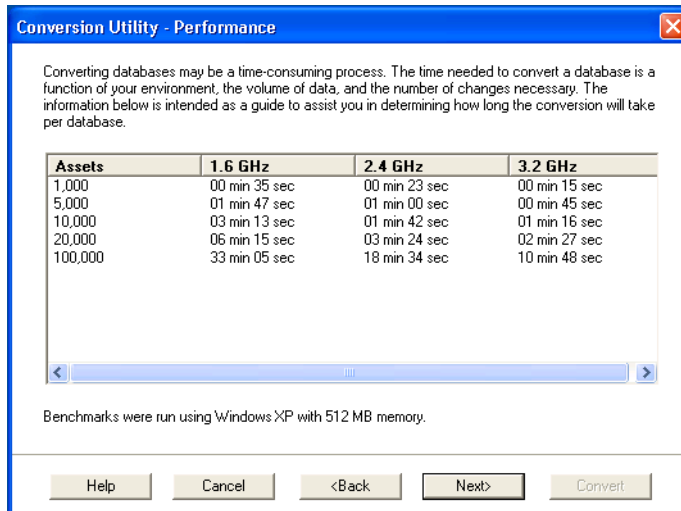
If more than one Sage Fixed Assets program is installed on your machine, the Conversion Utility Select Application dialog appears.



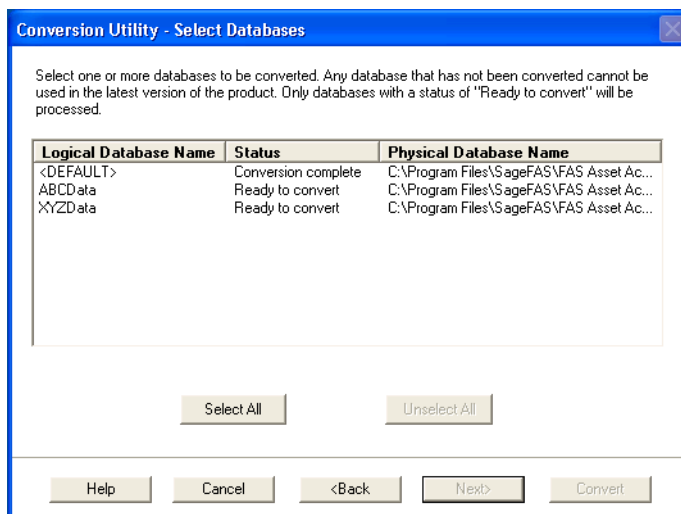
5. Select the Sage Fixed Assets program containing the database that you want to convert.
6. Click the Next button. The Conversion Utility Welcome dialog appears.



7. Click the Next button. The Conversion Utility Performance dialog appears.



8. Review the Conversion Utility Performance dialog to estimate how long the database conversion will take.
9. Click the Next button. The Conversion Utility Select Databases dialog appears.



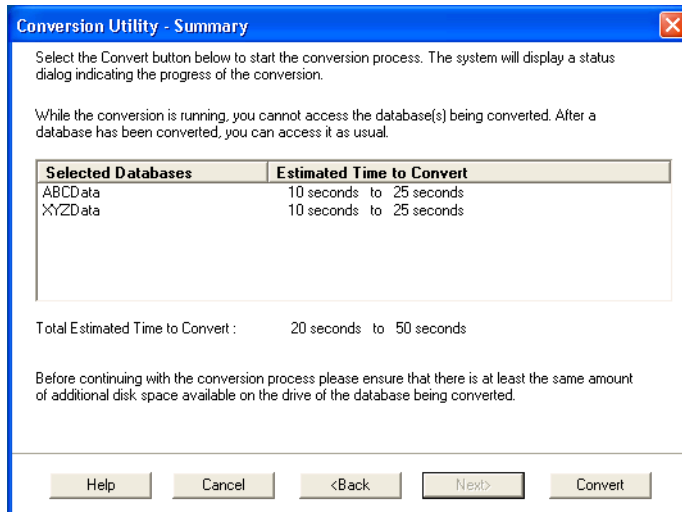
This dialog displays the status of each database.

- **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 information about which versions are compatible with the latest version of the application, see [“Previous Versions Compatible with the Latest Version,”](#) page 3-1. For assistance in converting your databases, please contact Sage Fixed Assets Customer Support.

■ **Cannot Open**

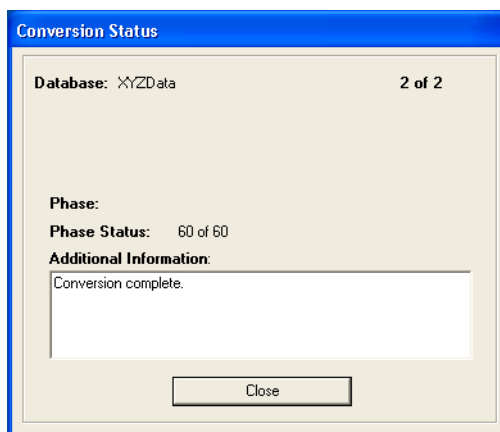
This status indicates that the database cannot be converted for an unknown reason. The database may have been moved and the system cannot locate it, or the database may be corrupted. For assistance in resolving the problem, please contact Sage Fixed Assets Customer Support.

10. Select the database(s) that you want to convert, and then click the Next button. The Conversion Utility Summary dialog appears.



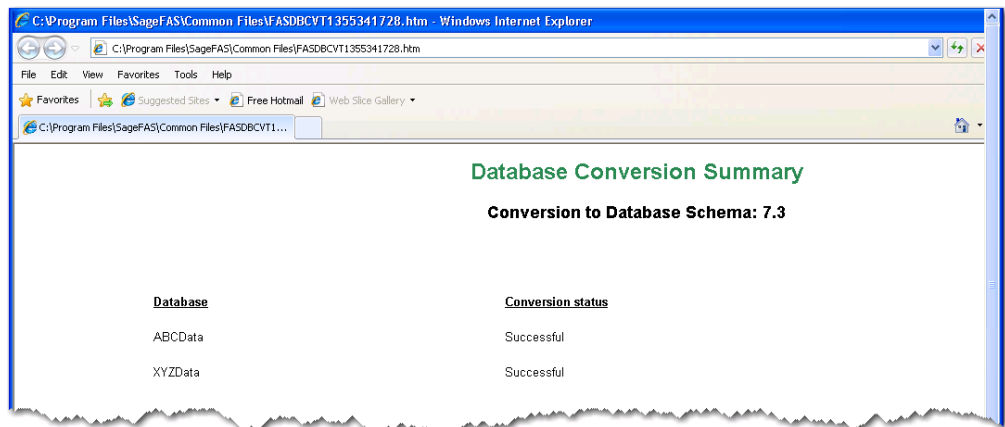
11. Review the Conversion Utility Summary dialog, and then click the Convert button.

The system checks your computer's disk space to make sure there is sufficient space to convert your data. The conversion requires three to four GB of disk space. If there is sufficient space for the conversion, it begins to convert the database(s) and displays the Conversion Status message box.



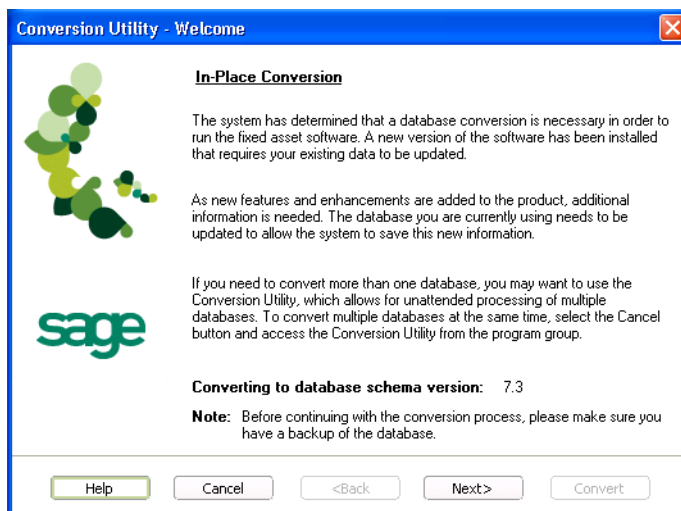
When the conversion is complete, a "Conversion Complete" message appears in the Additional Information text box.

- Click the Close button. The system displays the Database Conversion Summary report, which indicates whether the conversion was successful for each database.

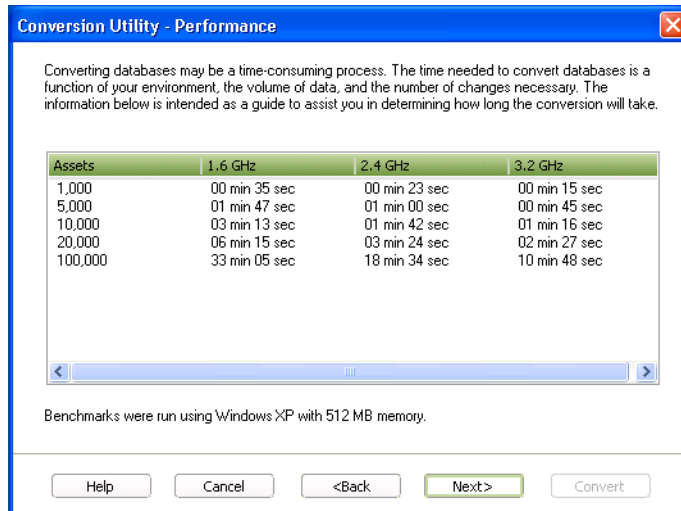


To perform an in-place database conversion

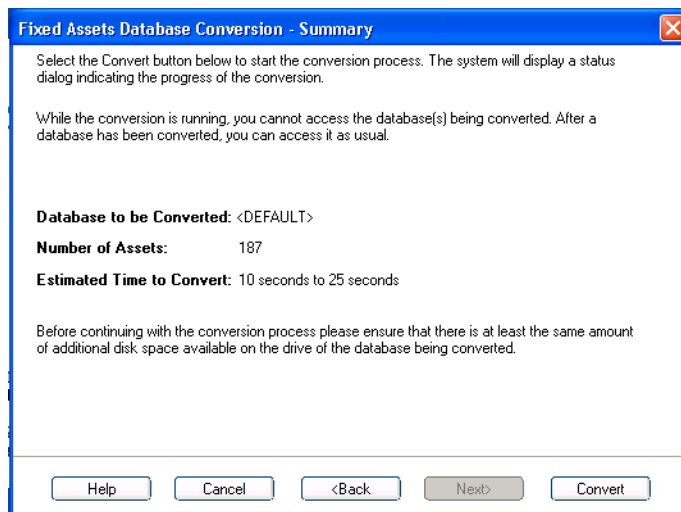
- Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
- Select the Sage Fixed Assets program group.
- Select the Depreciation icon. The application attempts to open a database that must be converted. The Conversion Utility Welcome dialog appears.



- Click the Next button. The Conversion Utility Performance dialog appears.

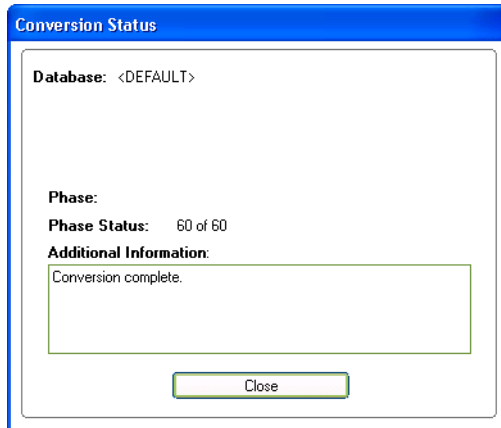


5. Review the Conversion Utility Performance dialog to estimate how long the database conversion will take.
6. Click the Next button. The Conversion Utility Summary dialog appears.



7. Review the Conversion Utility Summary dialog, and then click the Convert button.

The application checks your computer's disk space to make sure there is sufficient space to convert your data. If there is sufficient space for the conversion, it begins to convert the database(s) and displays the Conversion Status message box.



When the conversion is complete, a "Conversion Complete" message appears in the Additional Information text box.

Step 4: Starting the Application

The Depreciation program icon appears in the Sage Fixed Assets program group by default.

Note: You can also start the application by double-clicking the icon on your desktop.

To start the application

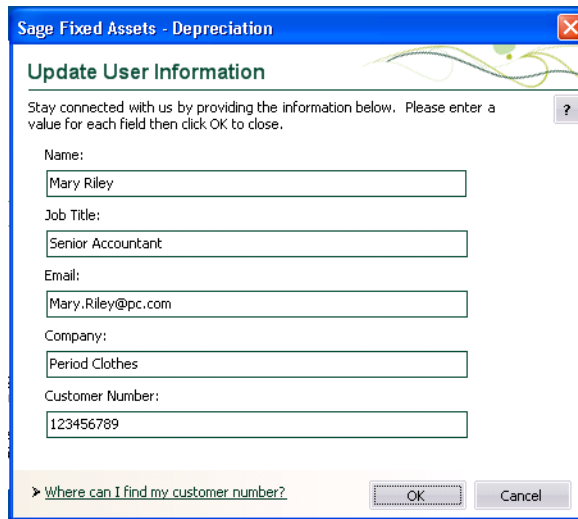
1. Click the Start button on the Windows taskbar, and then select Programs (or All Programs) from the Start menu.
2. Select the Sage Fixed Assets program group from the Programs submenu.
3. Select the Depreciation icon.

The system opens the application and displays the main window. If security is enabled, you must enter your user name and password.

To update your customer number

After you purchase the application, you will receive a customer number. You can enter your customer number so that it will be available if you need to call Customer Support with a question.

1. Select Help/Update User Information from the menu bar. A dialog appears that allows you to enter your customer number.



The screenshot shows a dialog box titled "Sage Fixed Assets - Depreciation" with a sub-header "Update User Information". The dialog contains the following text and fields:

Stay connected with us by providing the information below. Please enter a value for each field then click OK to close.

Name:

Job Title:

Email:

Company:

Customer Number:

At the bottom, there is a link: [Where can I find my customer number?](#), and two buttons: "OK" and "Cancel".

2. Enter your name, company name, and customer number, and then click OK.

To view your customer number

When you call Customer Support with a question, you will need your customer number. Follow the steps below to view your customer number.

1. Select Help/About Depreciation from the menu bar. A dialog appears that provides information about your program, including your customer number.

Chapter 4

Installing Sage Fixed Assets—Tracking the First Time

In this chapter:

Overview of the Install Process	4-1
Step 1: Attaching Your Physical Reader	4-1
Step 2: Installing the Latest Version	4-1
Step 3: Installing the Barcode Reader Program	4-7
Step 4: Registering the Application	4-10
Step 5: Starting the Application	4-11

This chapter provides instructions for users who have never installed Sage Fixed Assets—Tracking before. If you are currently using Sage Fixed Assets—Tracking, please see [Chapter 5, “Installing Sage Fixed Assets—Tracking: Upgrading from a Prior Version.”](#)

Overview of the Install Process

The install process consists of the following steps:

1. Attaching your physical reader, [page 4-1](#).
2. Installing the latest version, [page 4-1](#).
3. Installing the Barcode Reader program, [page 4-7](#).
4. Registering the application, [page 4-10](#).
5. Starting the program, [page 4-11](#).

Step 1: Attaching Your Physical Reader

In this step, you attach your physical reader to your workstation. The installation program will detect your reader and prompt you to install the Barcode Reader program (see [“Step 3: Installing the Barcode Reader Program,” page 4-7](#)).

Step 2: Installing the Latest Version

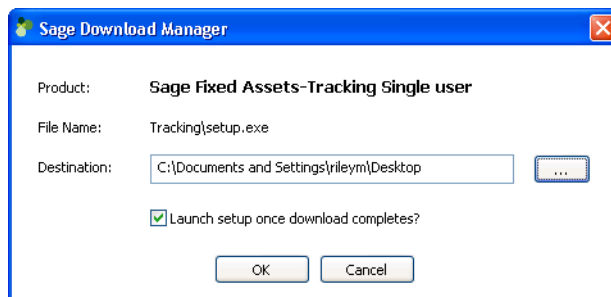
Before you begin to install the application, you should do the following:

- 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.

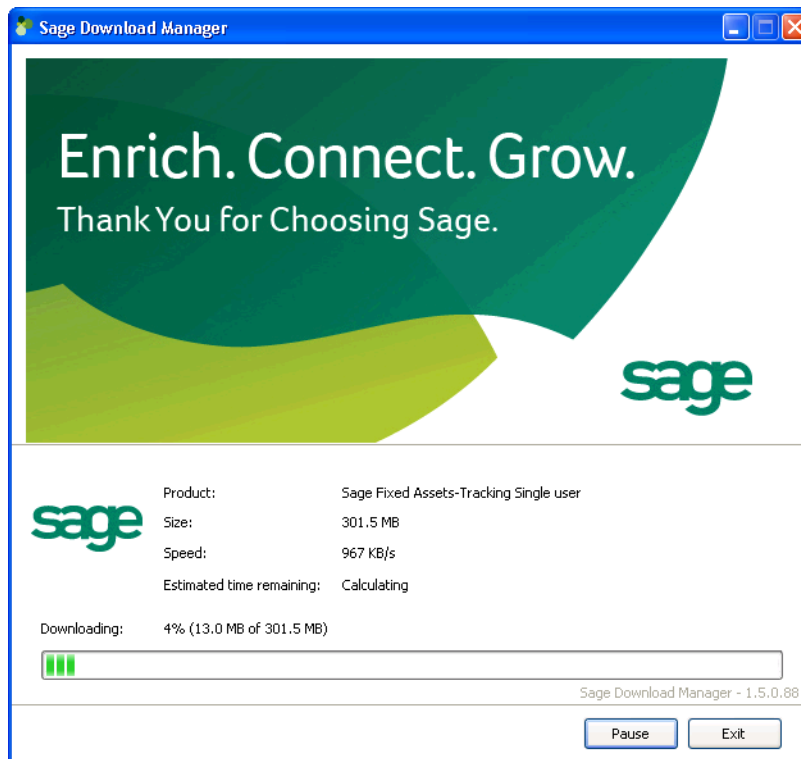
When installing the application, we recommend you accept the default options and directory locations the installation program provides. However, you can customize the installation to suit your needs by choosing the components you want to install.

To start the install program

1. Point your browser to the Sage Customer Portal at: **<https://customers.sagenorthamerica.com>**.
2. Click the Logon link and enter your Customer Logon information.
3. Click the Product Downloads link. The system opens a web page with downloads for system requirements, Sage Fixed Assets products, and their installation guides.
4. Click the Download link for the Tracking Stand-Alone Desktop Edition.
5. Click the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

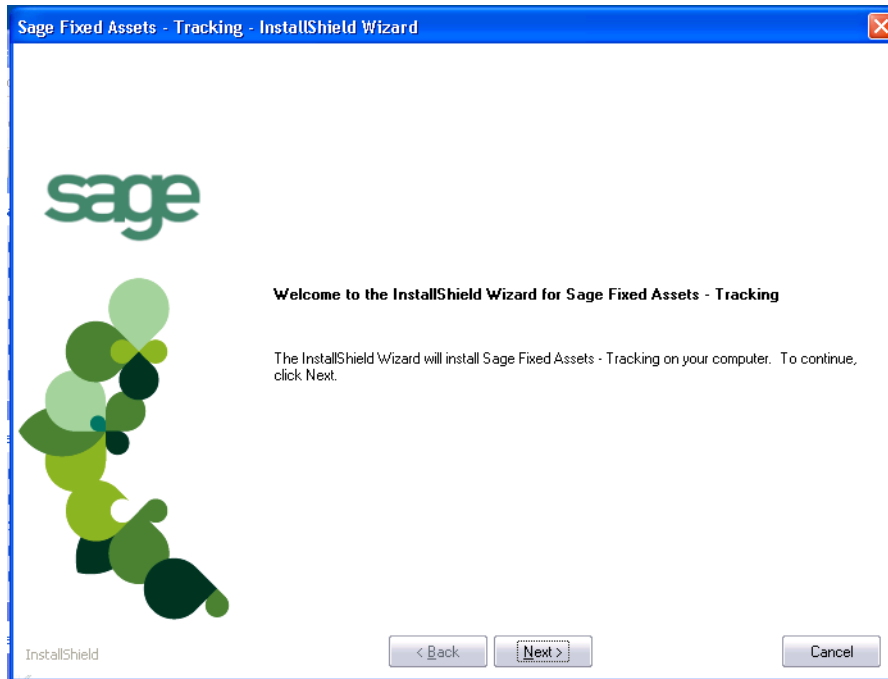


6. Click OK. The system begins to download the file.

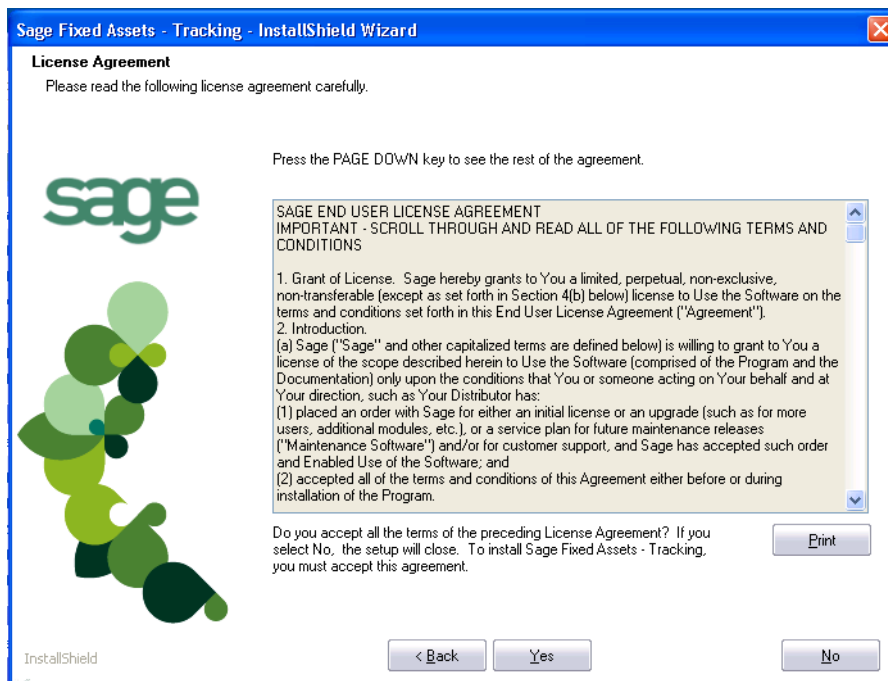


The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, and Microsoft Visual C++ 2005 Redistributables if it is not already installed.

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

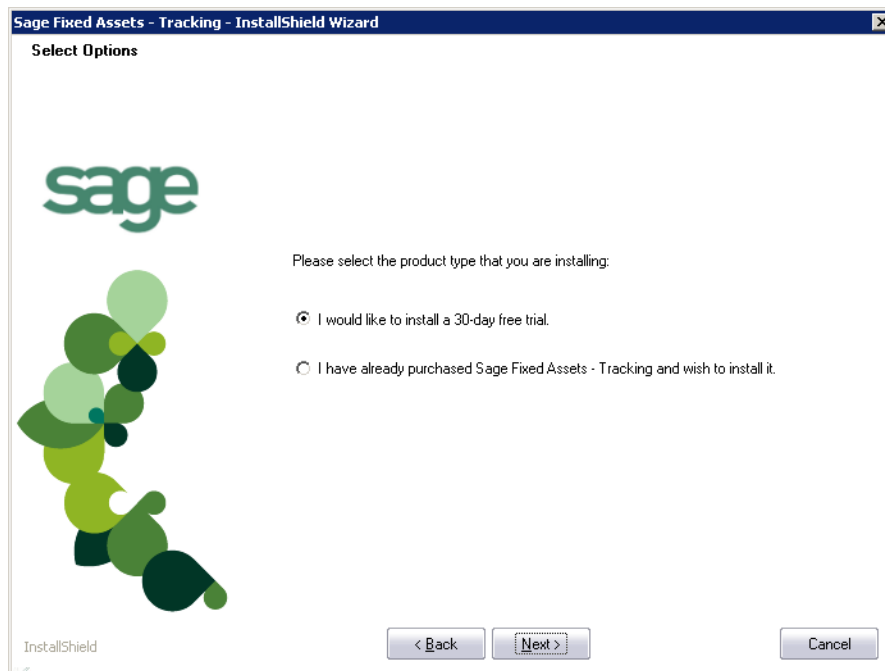


8. Click the Next button. The Software License Agreement dialog appears.



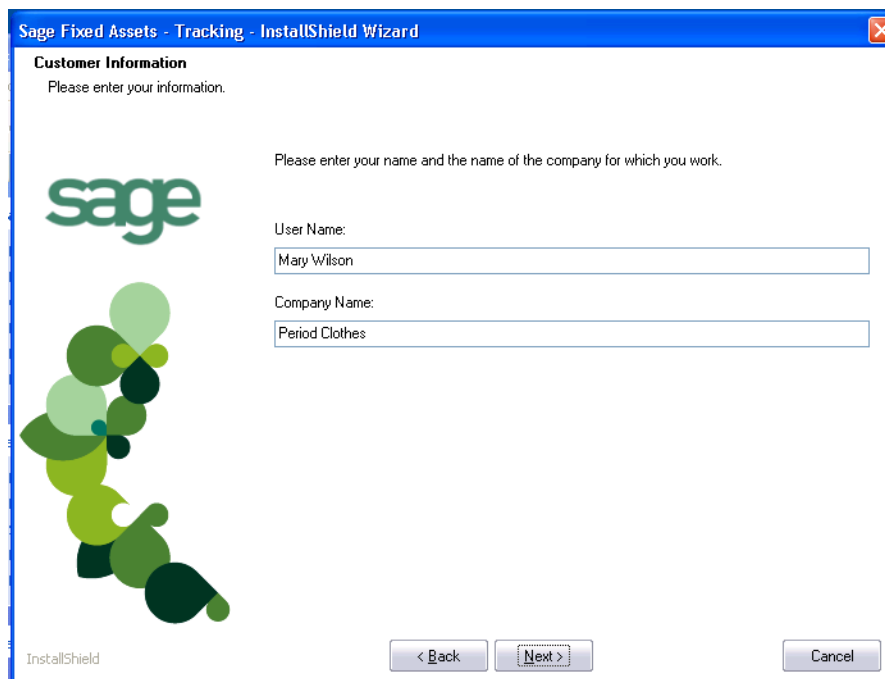
- **Print Button**
 Click this button to send the license agreement to the default printer.

9. Read the license agreement, and then click the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, click the No button. The system exits from the installation program.)
10. After you click the Yes button, the Select Options dialog appears.

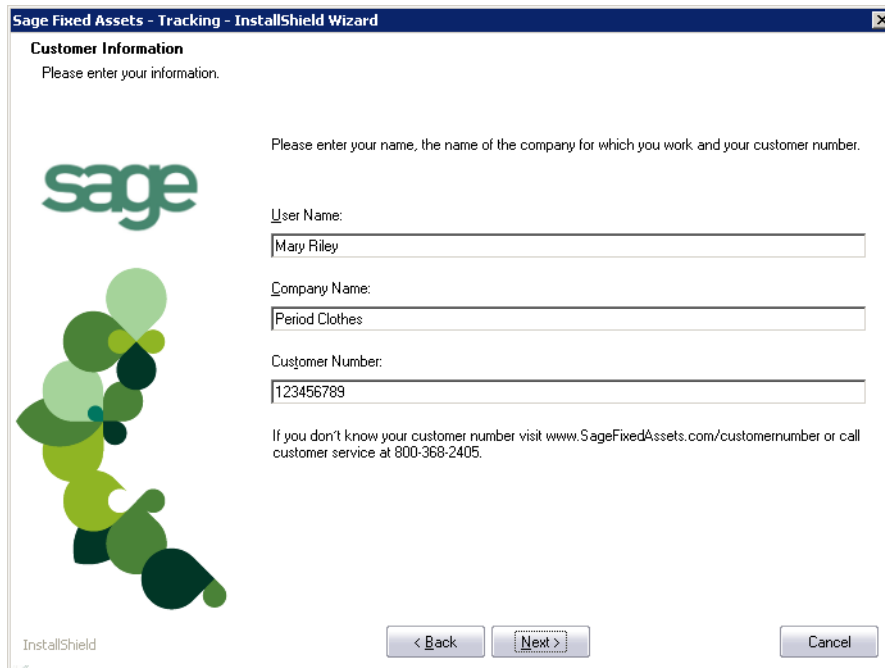


11. Select either the 30-day free trial option or the purchased option.

If you selected the 30-day free trial option, the following Customer Information dialog appears.



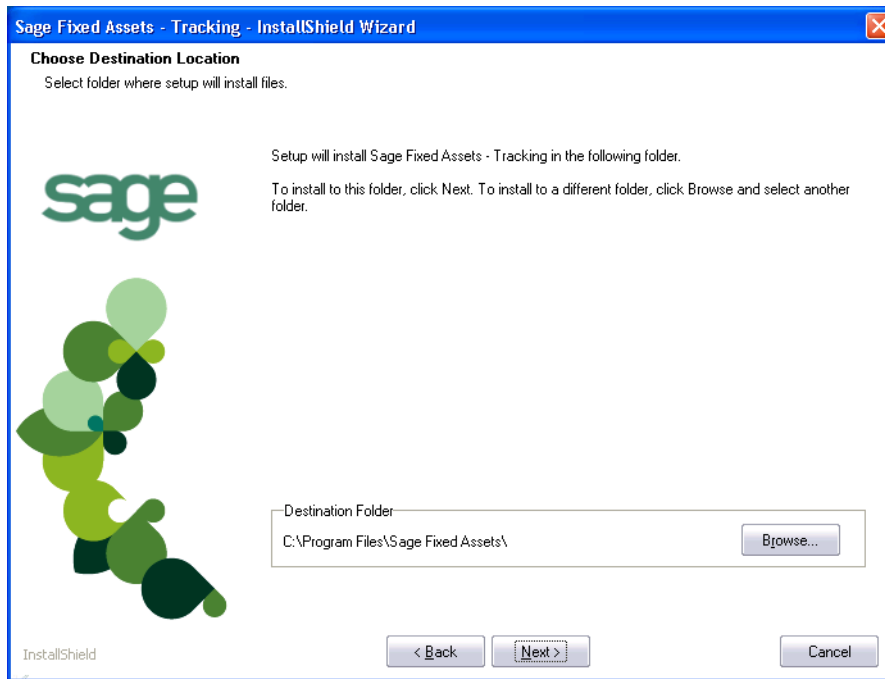
If you selected the purchased option, the following Customer Information dialog appears.



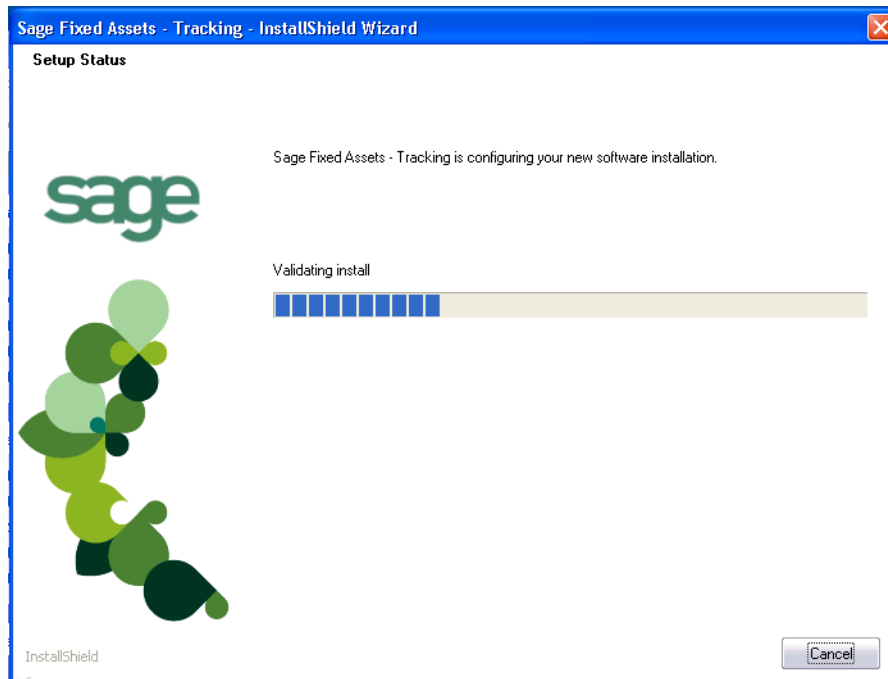
12. Enter your name, company name, and customer number if required. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

Note: You can find the customer number on the packing slip. If you cannot find your customer number, call Customer Service at 800-368-2405.

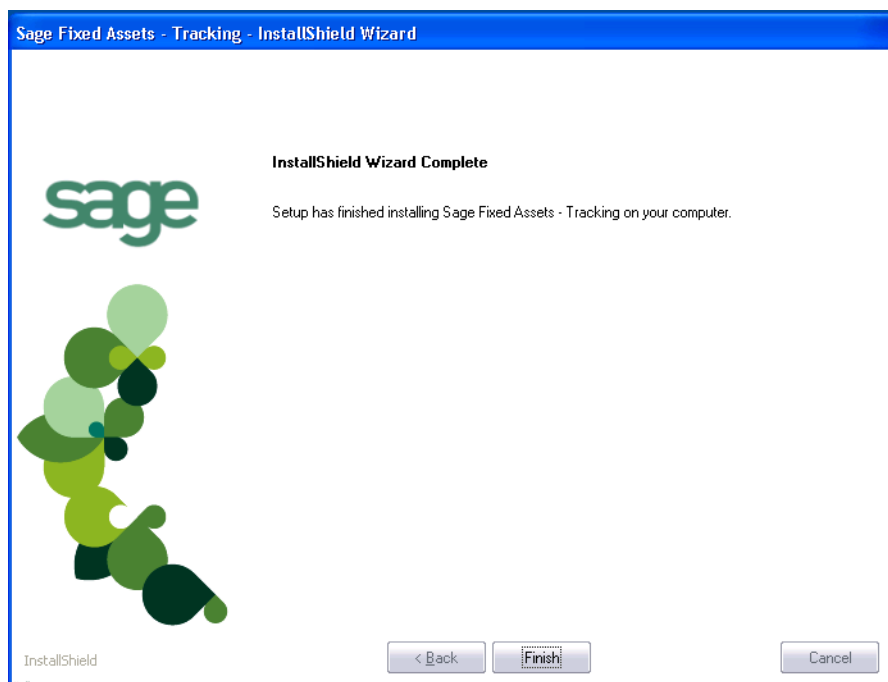
13. Click the Next button. The Choose Destination Location dialog appears.



14. Click the Next button. The system begins installing the software, and the Setup Status dialog appears.



When all of the 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.

15. Click the Finish button. The system returns to the installation dialog.

Step 3: Installing the Barcode Reader Program

To successfully operate physical readers during a Dynamic or Baseline inventory, you must transfer the Barcode Reader program files from your computer to the reader. You must have already installed Microsoft ActiveSync or Windows Mobile Device Center on your computer before installing Barcode Reader.

You only need to follow the procedure that downloads the Barcode Reader program to the physical reader once. You will not need to repeat this procedure unless there is an update to the program.

Note: Before installing the Barcode Reader program, you must make sure that either Microsoft ActiveSync or Windows Mobile Device Center (depending on your operating system) is installed on your computer. You can obtain them for free from the download page on the Microsoft website at www.microsoft.com.

The following steps describe how to install the Barcode Reader program during the installation of Sage Fixed Assets—Tracking. You can install the Barcode Reader program at any time after you have installed the application by doing the following:

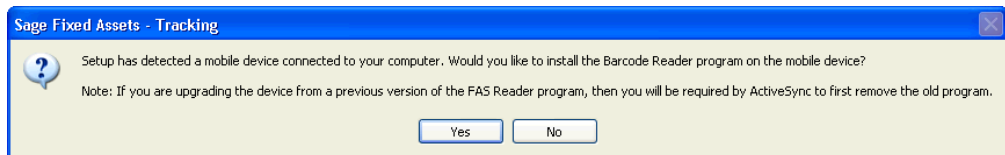
- Attach the physical reader to your computer.
- Double-click the SETUP.EXE file located in the Reader folder where you installed Sage Fixed Assets—Tracking. The default location is C:\Program Files\Sage Fixed Assets\Reader.

You may need to perform the steps above if you have purchased more than one reader.

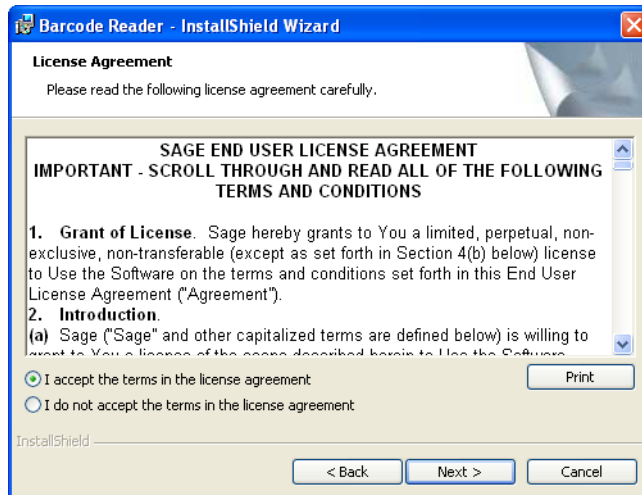
To install the Barcode Reader program to the physical reader

1. Before starting the Sage Fixed Assets—Tracking installation, make sure your physical reader is connected to your computer and has at least 3 MB of storage memory available.

At the end of the Sage Fixed Assets—Tracking installation process, the system asks if you would like to install the Barcode Reader program.

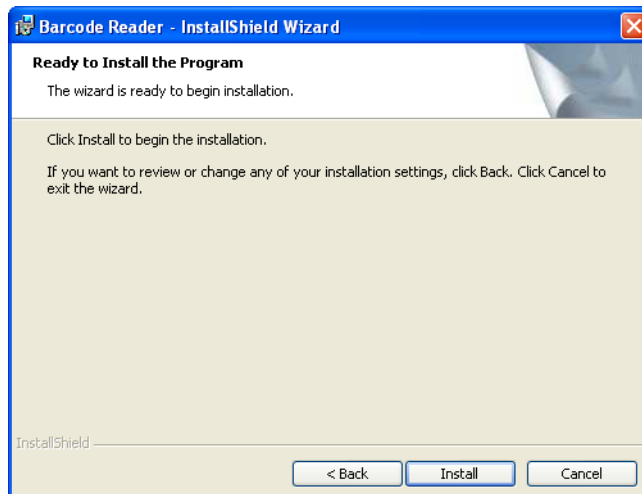


2. Click Yes. The Welcome dialog appears.
3. Click the Next button. The License Agreement dialog appears.



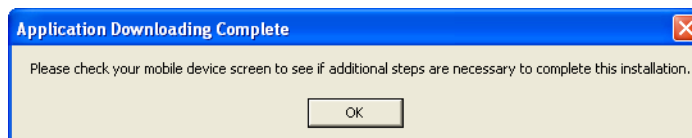
4. Read the license agreement, accept the terms of the license agreement, and then click the Next button. (If you do not accept the terms of the license agreement, click the Cancel button and the system exits from the installation program.)

The Ready to Install the Program dialog appears.

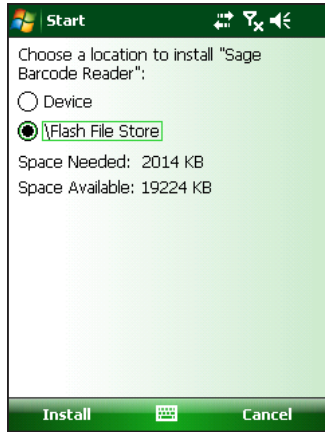


5. Click the Install button. The system displays a dialog that indicates the progress of the installation.

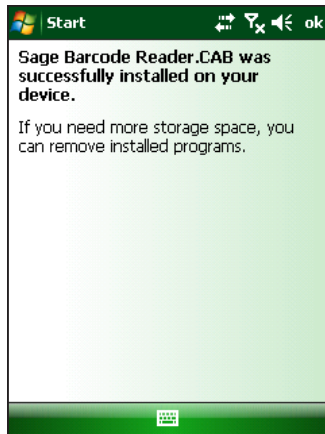
When the installation is complete, a message asks you to check your physical device screen for additional steps to complete the installation.



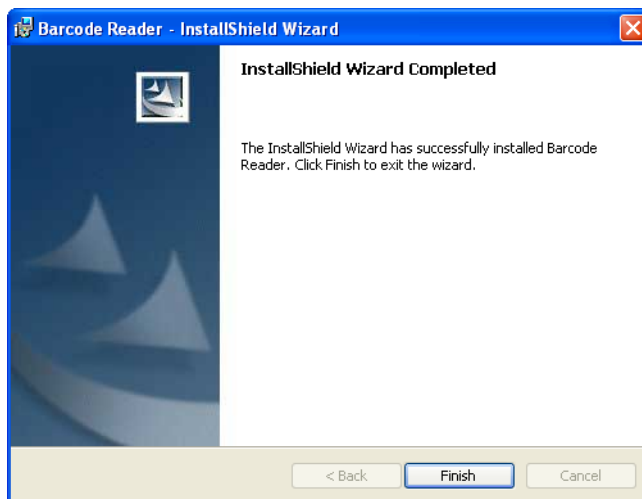
6. Click OK. On the physical device, a message allows you to select the location for installing the Barcode Reader program.



7. Click the \Flash File Store option, and then click Install. On the physical device, a message confirms the successful installation of the Barcode Reader.



On the computer desktop, the InstallShield Wizard Completed dialog appears.



8. Click the Finish button.

Note: After installation is complete, it is recommended that you restart the physical reader.

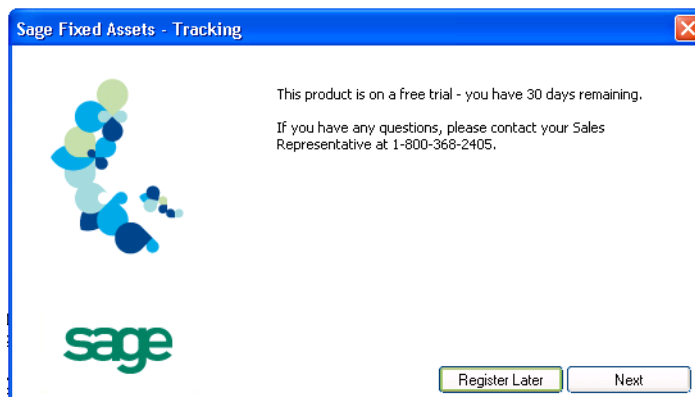
Step 4: Registering the Application

The process of registering the application is a one-time event. After you enter your registration codes, you won't have to enter them again—not even when you receive your next program update.

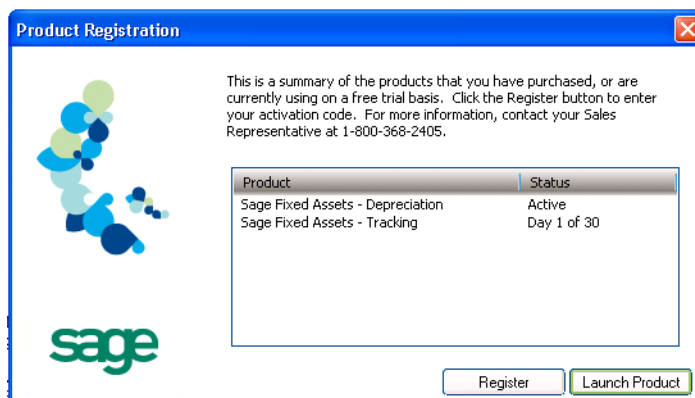
Note: You have 30 days to register the application.

To register the application

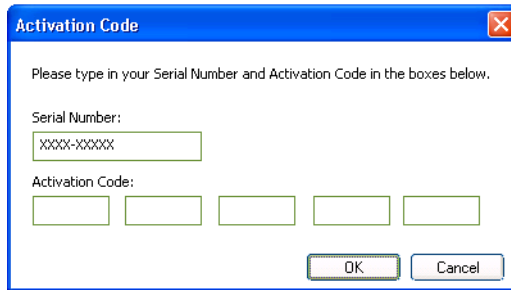
1. Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
2. Select the Sage Fixed Assets program group.
3. Select the Tracking icon. A message appears indicating you can use the application for 30 days.



4. Click the Next button. The Product Registration dialog appears.



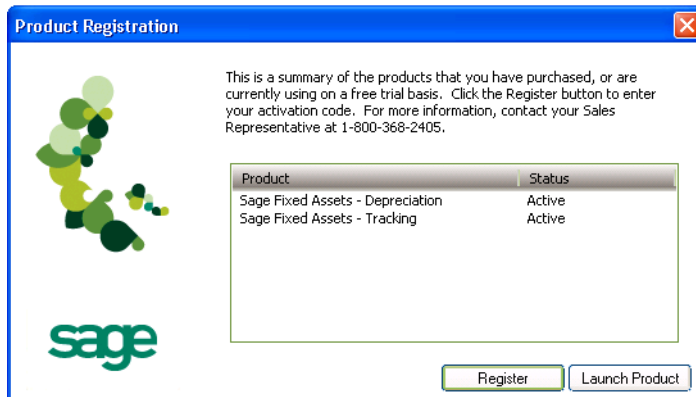
5. Click the Register button. A registration dialog appears allowing you to enter your Serial Number and Activation Code.



- **Serial Number**
Enter your serial number. **You must enter the hyphen.**
- **Activation Code**
Enter your activation code.

Please contact Customer Service at 800-368-2405 if you cannot find your serial number and activation code.

6. Click OK. The system returns to the Product Registration dialog.



7. Click the Launch Product button to start the application.

Step 5: Starting the Application

The Tracking program icon appears in the Sage Fixed Assets program group by default.

Note: You can also start the application by double-clicking the icon on your desktop.

To start the application

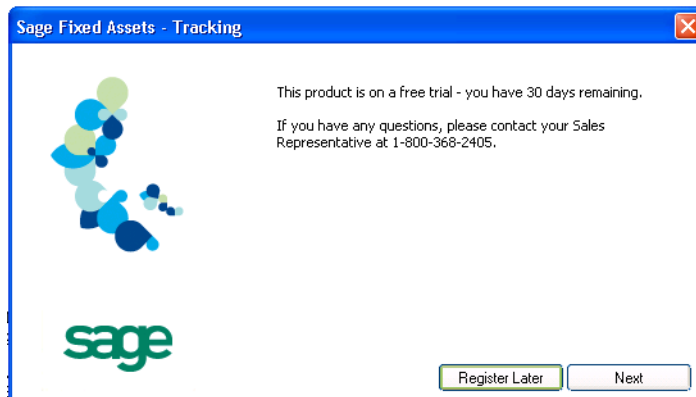
Starting the purchased version:

1. Click 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 from the Programs submenu.
3. Select the Tracking icon.

The system opens the application and displays the main window. If security is enabled, you must enter your user name and password.

Starting the free trial version:

1. Click 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 from the Programs submenu.
3. Select the Tracking icon. A message appears indicating you have 30 days to try the program.



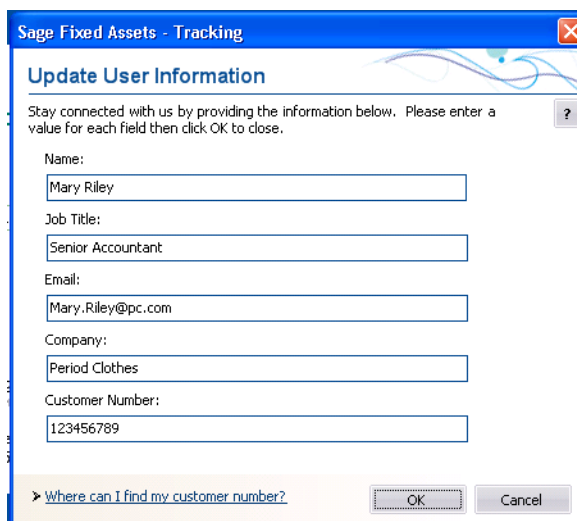
4. Click the Register Later button.

The system opens the application and displays the main window.

To update your customer number

After you purchase the application, you will receive a customer number. You can enter your customer number so that it will be available if you need to call Customer Support with a question.

1. Select Help/Update User Information from the menu bar. A dialog appears that allows you to enter your customer number.



2. Enter your name, company name, and customer number, and then click OK.

To view your customer number

When you call Customer Support with a question, you will need your customer number. Follow the steps below to view your customer number.

1. Select Help/About Tracking from the menu bar. A dialog appears that provides information about your program, including your customer number.

Chapter 5

Installing Sage Fixed Assets—Tracking: Upgrading from a Prior Version

In this chapter:

Previous Versions Compatible with the Latest Version	5-1
Overview of the Upgrade Process	5-1
Step 1: Backing Up Your Data	5-2
Step 2: Installing the Latest Version	5-2
Step 3: Upgrading the Barcode Reader Program	5-7
Step 4: Converting Your Data	5-11
Step 5: Starting the Application	5-17

This chapter provides instructions for upgrading from a previous version of Sage Fixed Assets—Tracking.

Previous Versions Compatible with the Latest Version

You must be currently using the version 2013.1 of Sage Fixed Assets—Tracking to follow the steps in this chapter. If you are not running the latest version, you will need to 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 2011 (Crystal Reports), which requires 2 GB of hard disk space. A previous version of Sage Fixed Assets—Reporting used Crystal Reports XI. If this version of Crystal Reports is still on your machine, we recommend that you uninstall it to avoid conflicts with the latest version.

Overview of the Upgrade Process

The upgrade process consists of the following steps:

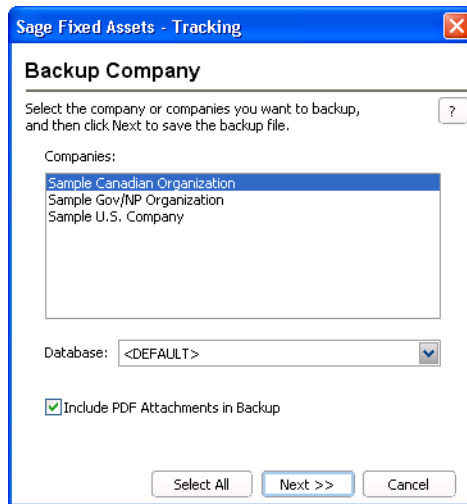
1. Backing up your current data, [page 5-2](#).
2. Installing the latest version, [page 5-2](#).
3. Upgrading the Barcode Reader program, [page 5-7](#).
4. Converting your current data, [page 5-11](#).
5. Starting the application, [page 5-17](#).

Step 1: Backing Up Your Data

After you install the latest Sage Fixed Assets version, you cannot open your companies in a previous version of the application. You may want to back up your data before you install the latest version, in case you need to go back to a previous version.

To back up your database

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



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 companies in multiple databases.

3. Select the company or companies that you want to back up.

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

4. Click the Next button, and designate the destination directory, enter a file name for the backup file, and then click the Backup button.
5. After the backup is complete, click the Cancel button to close the Backup Companies dialog, or select another company to back up.

Step 2: Installing the Latest Version

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

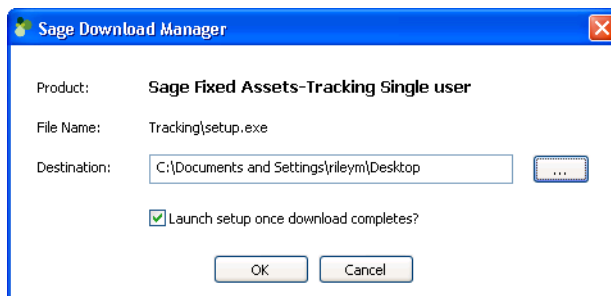
- Close all other Windows programs.
- Close all tool bars on your computer's desktop (such as the Microsoft Office tool bar).
- Close all programs that run in the background after you start your computer (such as virus-checking programs).

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

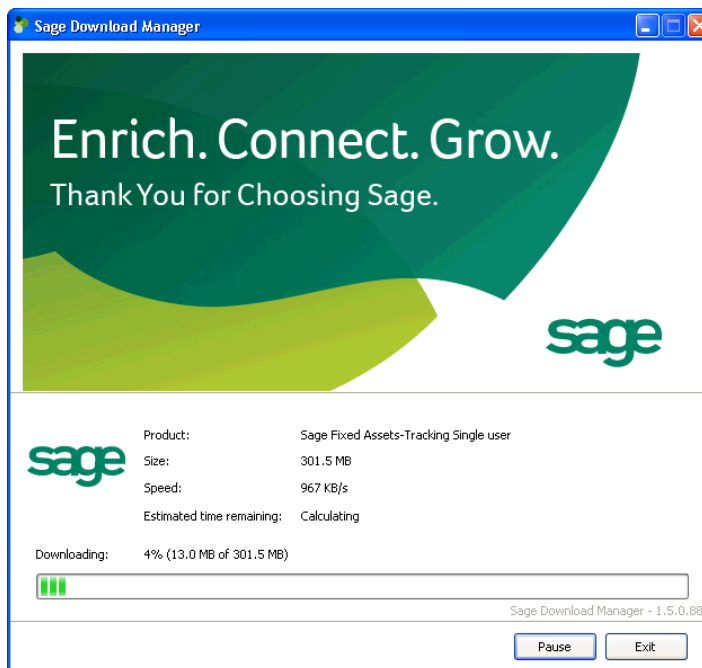
When installing the application, we recommend you accept the default options and directory locations the installation program provides. However, you can customize the installation to suit your needs by choosing the components you want to install.

To start the install program

1. Point your browser to the Sage Customer Portal at: **https://customers.sagenorthamerica.com**.
2. Click the Logon link and enter your Customer Logon information.
3. Click the Product Downloads link. The system opens a web page with downloads for system requirements, Sage Fixed Assets products, and their installation guides.
4. Click the Download link for the Tracking Stand-Alone Desktop Edition.
5. Click the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

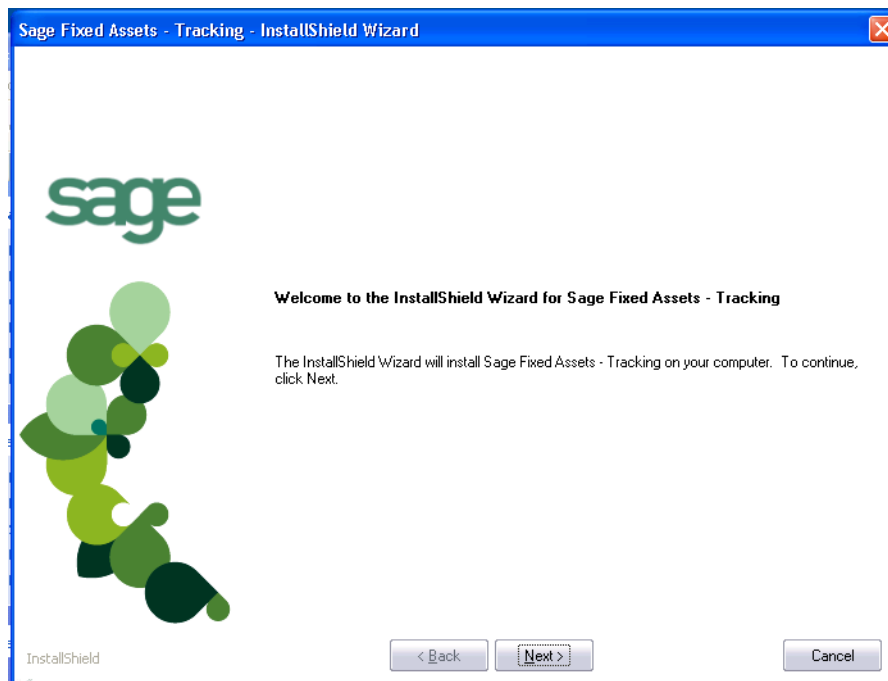


6. Click OK. The system begins to download the file.

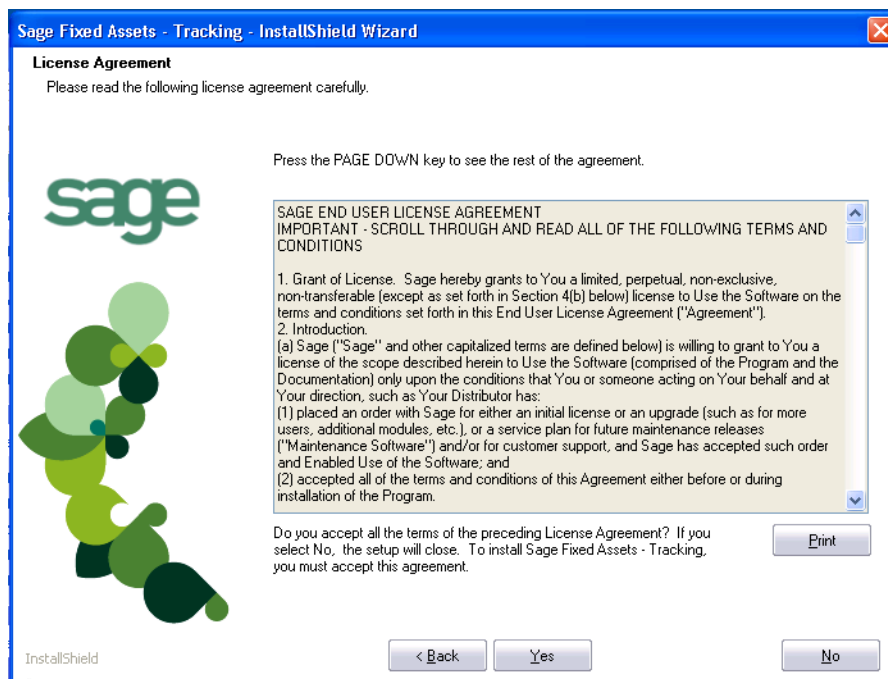


The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, and Microsoft Visual C++ 2005 Redistributables if it is not already installed.

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

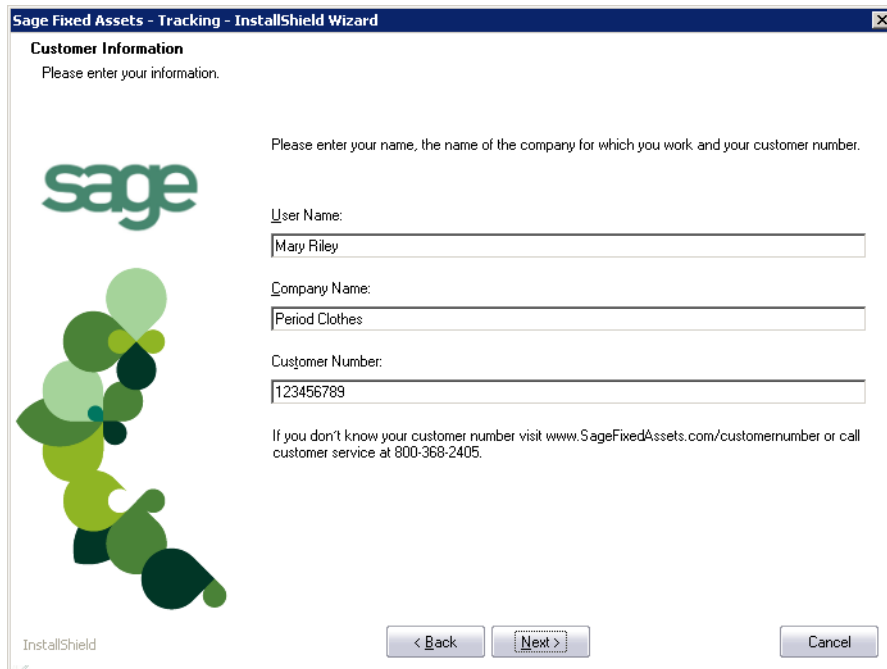


8. Click the Next button. The Software License Agreement dialog appears.



- **Print Button**
Click this button to send the license agreement to the default printer.

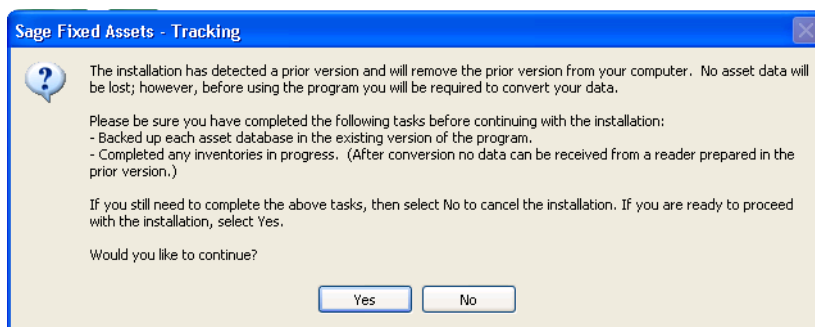
9. Read the license agreement, and then click the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, click the No button. The system exits from the installation program.)
10. After you click the Yes button, the Customer Information dialog appears.



11. Enter your name, company name, and customer number. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

Note: You can find the customer number on the packing slip in the upgrade package or by clicking About Tracking from the Help menu. If you cannot find your customer number, call Customer Service at 800-368-2405.

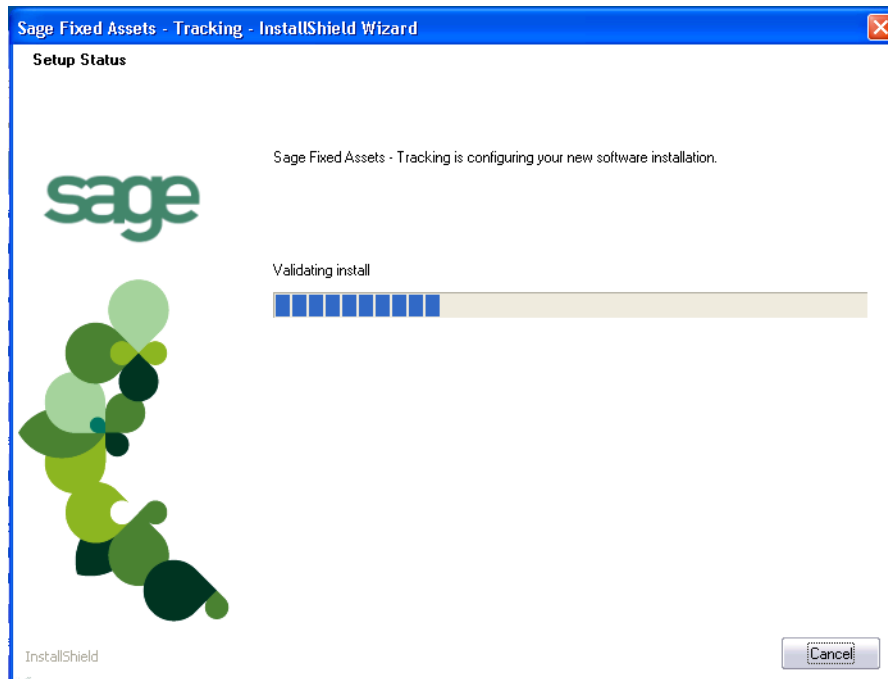
12. Click the Next button. A message appears indicating that a previous version of the program has been found on your computer.



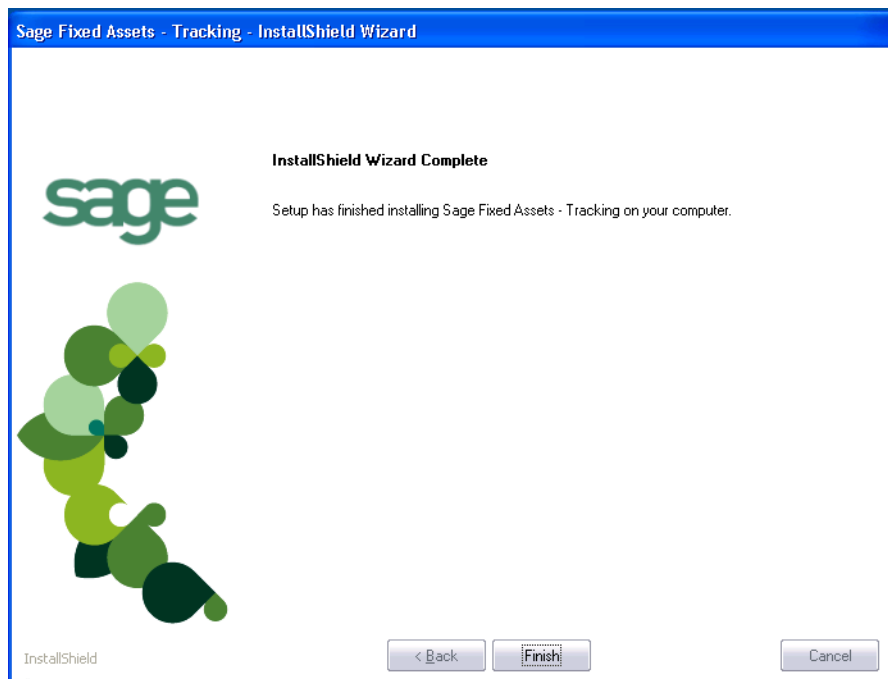
Note: Before you continue, make sure you do not have inventories in progress. After you install the latest version, the system will not be able to receive data from readers prepared in a prior version of the application.

13. Do one of the following:

- Click No to cancel the installation and receive data from your reader(s).
- Click Yes to remove the prior version of the application. The system begins installing the software, and the Setup Status dialog appears.



When all of the 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.

14. Click the Finish button. The system returns to the Sage Fixed Assets installation dialog.

Step 3: Upgrading the Barcode Reader Program

To successfully operate physical readers during a Dynamic or Baseline inventory, you must transfer the Barcode Reader program files from your computer to the reader. You must have already installed Microsoft ActiveSync or Windows Mobile Device Center on your computer before installing Barcode Reader.

You only need to follow the procedure that downloads the Barcode Reader program to the physical reader once. You will not need to repeat this procedure unless there is an update to the program.

Note: Before installing the Barcode Reader program, you must make sure that either Microsoft ActiveSync or Windows Mobile Device Center (depending on your operating system) is installed on your computer. You can obtain them for free from the download page on the Microsoft website at www.microsoft.com.

The following steps describe how to install the Barcode Reader program during the installation of Sage Fixed Assets—Tracking. You can install the Barcode Reader program at any time after you have installed the Sage Fixed Assets—Tracking by doing the following:

- Attach the physical reader to your computer.
- Double-click the SETUP.EXE file located in the Reader folder where you installed Sage Fixed Assets—Tracking. The default location is C:\Program Files\Sage Fixed Assets\Reader.

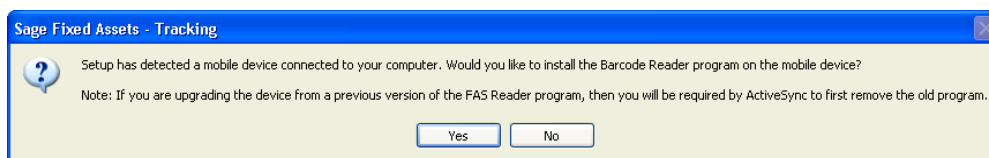
You may need to perform the steps above if you have purchased more than one reader.

To upgrade the reader program

Complete the following steps if you have already installed a previous version of the reader program on your physical device.

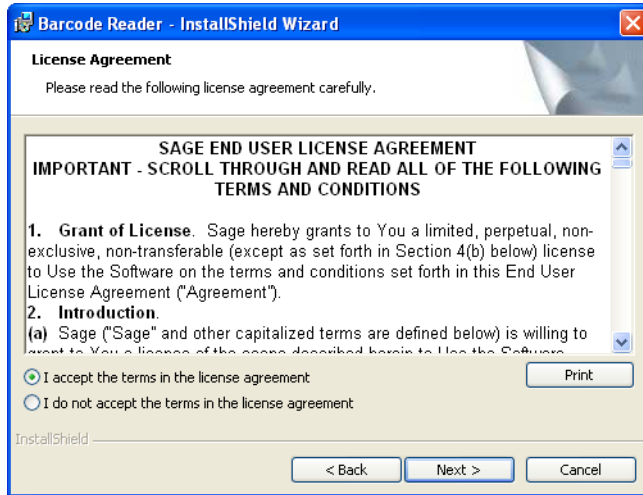
1. Before starting the Sage Fixed Assets—Tracking installation, make sure your physical reader is connected to your computer and has at least 3 MB of storage memory available.

At the end of the Sage Fixed Assets—Tracking installation process, the system asks if you would like to install the Barcode Reader program.



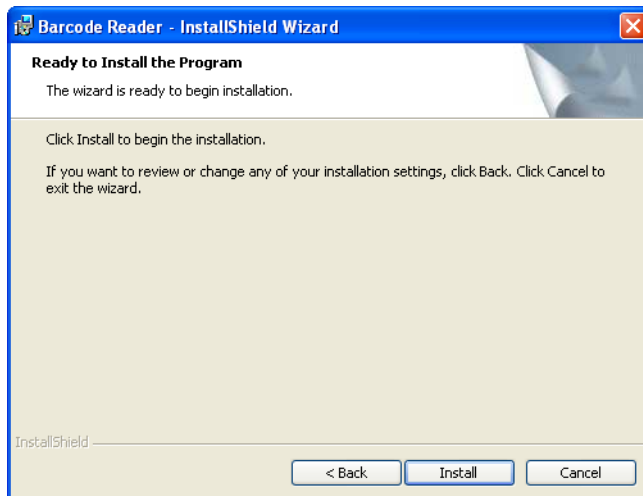
2. Click Yes. The Welcome dialog appears.

3. Click the Next button. The License Agreement dialog appears.



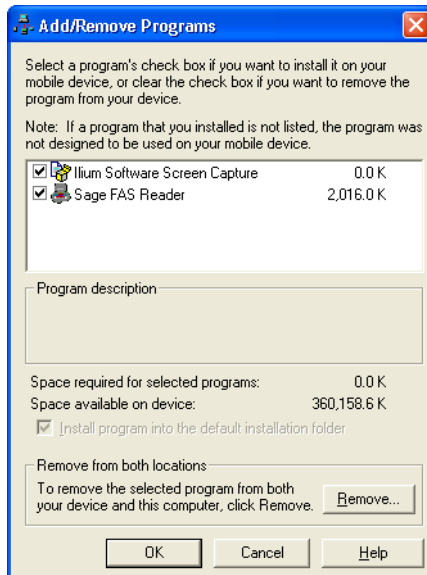
4. Read the license agreement, accept the terms of the license agreement, and then click the Next button. (If you do not accept the terms of the license agreement, click the Cancel button and the system exits from the installation program.)

The Ready to Install the Program dialog appears.

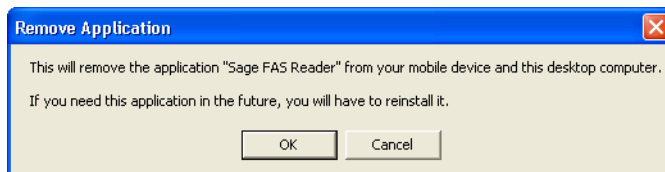


Note: Because you are upgrading the device from a previous version of the reader program, you will be required by ActiveSync or Windows Mobile Device Center to first remove the old program.

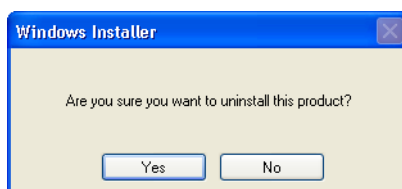
5. Click the Install button. The Add/Remove Programs dialog appears.



6. Make sure to select the reader program you want to remove. In the current version, the reader program on the device is called Sage Barcode Reader. In previous versions, the program was called Sage FAS Reader and Sage FAS CE.
7. Click the Remove button. The system displays a confirmation message.

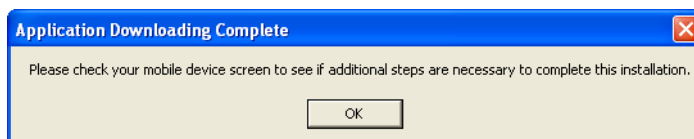


8. Click OK. The system displays a message that confirms your intention to uninstall the previous version of the program.

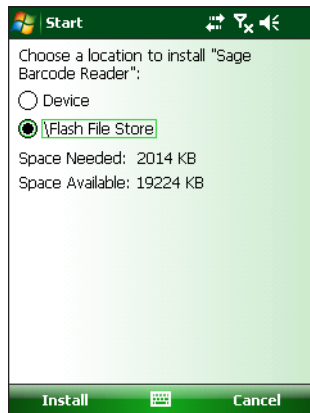


9. Click Yes. The system displays a dialog that indicates the progress of the installation of the new Barcode Reader program.

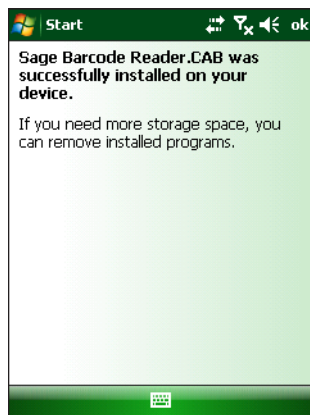
When the installation is complete, a message asks you to check your mobile device screen for additional steps to complete the installation.



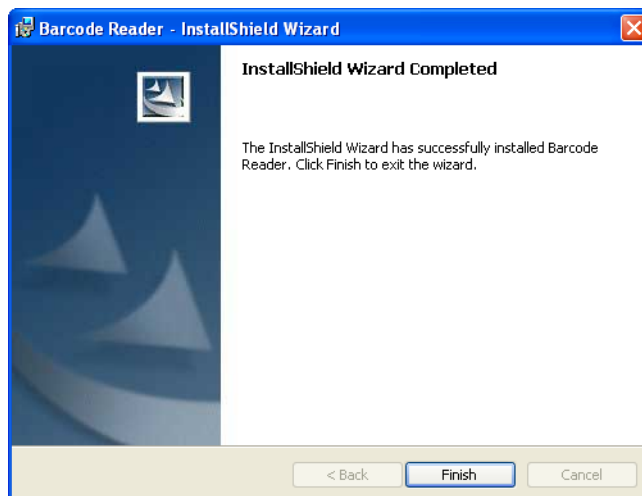
10. Click OK. On the physical device, a message allows you to select the location for installing the Barcode Reader program.



11. Click the \Flash File Store option, and then click Install. On the physical device, a message confirms the successful installation of the Barcode Reader.



On the computer desktop, the InstallShield Wizard Completed dialog appears.



12. Click the Finish button.

Note: After installation is complete, it is recommended that you restart the physical reader.

Step 4: Converting Your 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 asset database so that the system can store the new information. To update your database(s) to hold the new information, you must perform a database conversion.

Note: You must be currently using a version of Sage Fixed Assets—Tracking that is compatible with the latest version to follow the steps in this section. For information about which versions are compatible with the latest version of the application, see [“Previous Versions Compatible with the Latest Version,”](#) page 5-1.

Note: Before you convert your data, make sure you do not have inventories in progress. After your data has been converted, the system will not be able to receive data from readers prepared in a prior version of the application. **To receive the reader data, you must reinstall the prior version.**

You have two options for converting your databases.

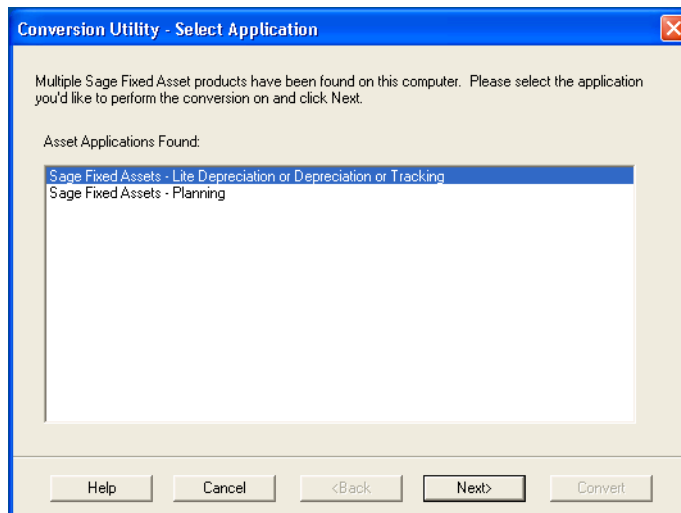
- **Database Conversion Utility:** You can use the utility to convert two or more databases at a time. You run the utility from the Sage Fixed Assets program group.
- **In-place Database Conversion:** You perform this type of database conversion when you open a database. You can convert only one database at a time with this type of conversion.

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

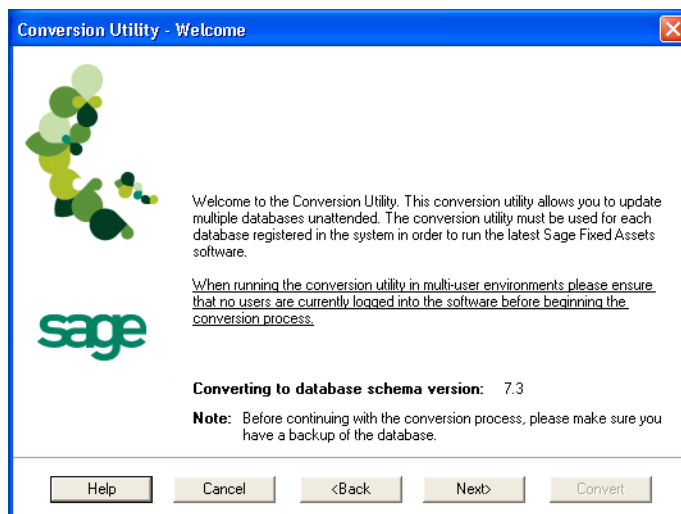
To use the Database Conversion Utility to convert databases

1. Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
2. Select the Sage Fixed Assets program group.
3. Select the Tools program group.
4. Select the Conversion Utility icon.

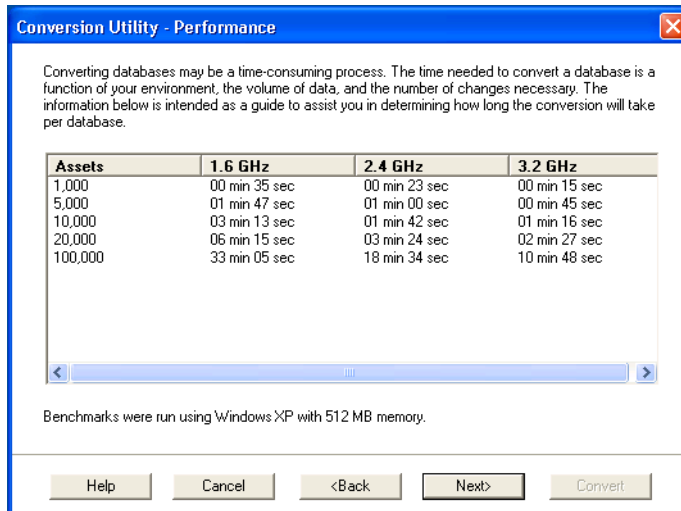
If more than one Sage Fixed Assets program is installed on your machine, the Conversion Utility Select Application dialog appears.



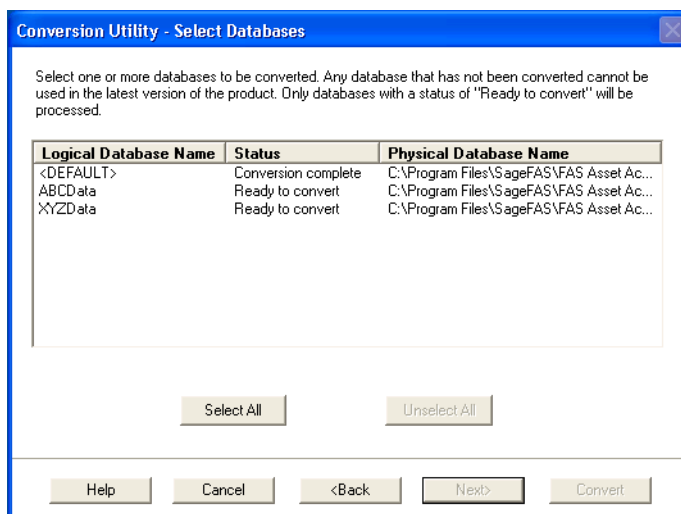
5. Select the Sage Fixed Assets program containing the database(s) that you want to convert.
6. Click the Next button. The Conversion Utility Welcome dialog appears.



7. Click the Next button. The Conversion Utility Performance dialog appears.



8. Review the Conversion Utility Performance dialog to estimate how long the database conversion will take.
9. Click the Next button. The Conversion Utility Select Databases dialog appears.



This dialog displays the status of each database.

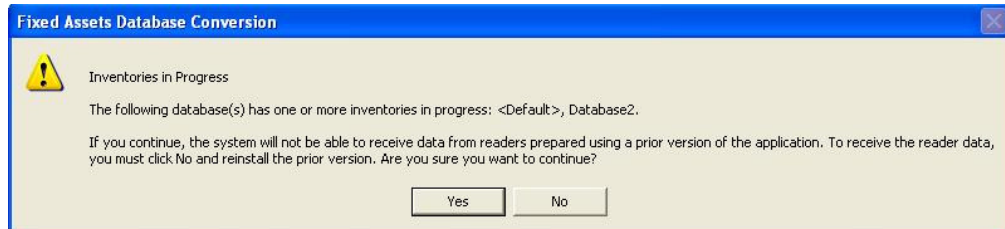
- **Conversion Complete**
 This status indicates that the database has already been converted to the latest version.
- **Ready to Convert**
 This status indicates that the database is ready to be converted to the latest version.
- **Incompatible Version**
 This status indicates that the database cannot be converted because the database version is incompatible with the latest version of the application. For information about which versions are compatible with the latest version of the application, see “[Previous Versions Compatible with the Latest Version](#),” page 5-1. For assistance in converting your databases, please contact Sage Fixed Assets Customer Support.

■ **Cannot Open**

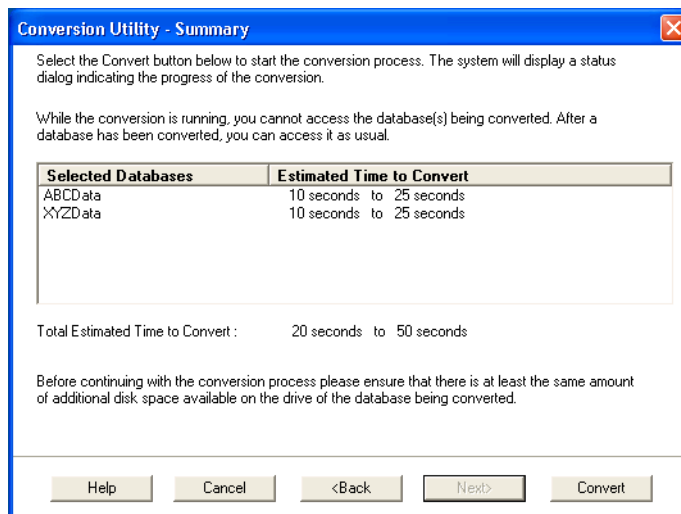
This status indicates that the database cannot be converted for an unknown reason. The database may have been moved and the system cannot locate it, or the database may be corrupted. For assistance in resolving the problem, please contact Sage Fixed Assets Customer Support.

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

If a selected database contains a company with an inventory in progress, a message warns you that after the database conversion the system will be unable to receive data from readers prepared in a prior version of the application. **To receive the reader data, you must click No and reinstall the prior version.**

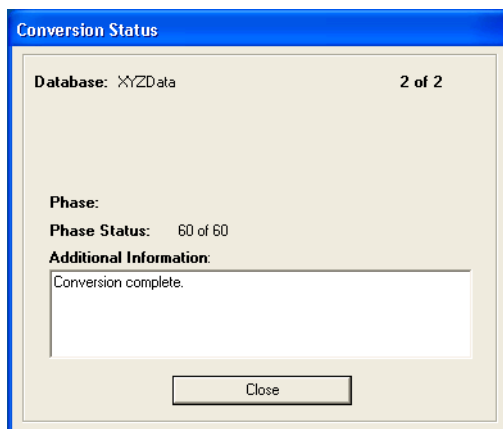


11. Click Yes to continue. The Conversion Utility Summary dialog appears.



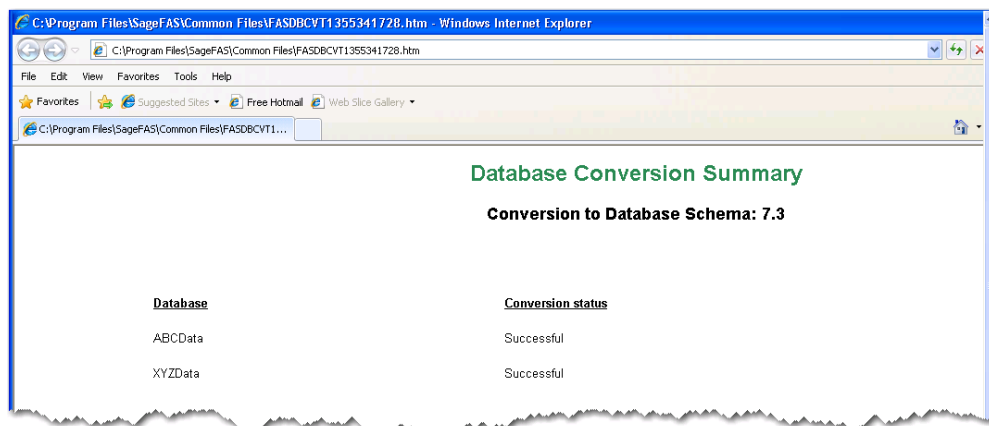
12. Review the Conversion Utility Summary dialog, and then click the Convert button.

The system checks your computer's disk space to make sure there is sufficient space to convert your data. The conversion requires three to four GB of disk space. If there is sufficient space for the conversion, it begins to convert the database(s) and displays the Conversion Status message box.



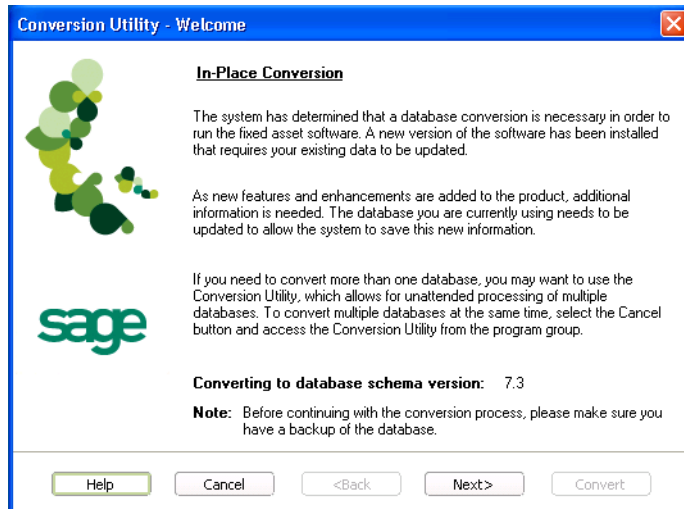
When the conversion is complete, a “Conversion Complete” message appears in the Additional Information text box.

13. Click the Close button. The system displays the Database Conversion Summary report, which indicates whether the conversion was successful for each database.

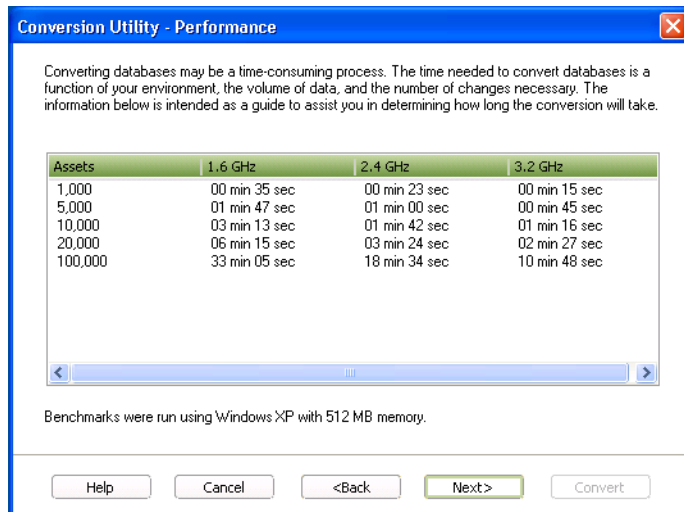


To perform an in-place database conversion

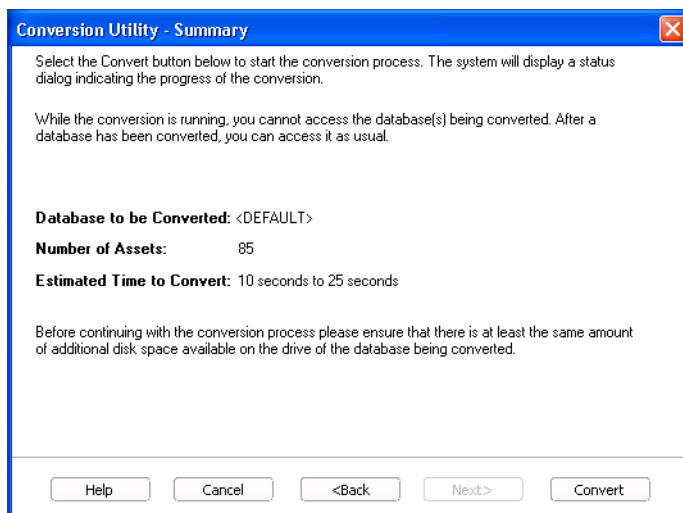
1. Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
2. Select the Sage Fixed Assets program group
3. Select the Tracking icon. The application attempts to open a database that must be converted. The Conversion Utility Welcome dialog appears.



4. Click the Next button. The Conversion Utility Performance dialog appears.

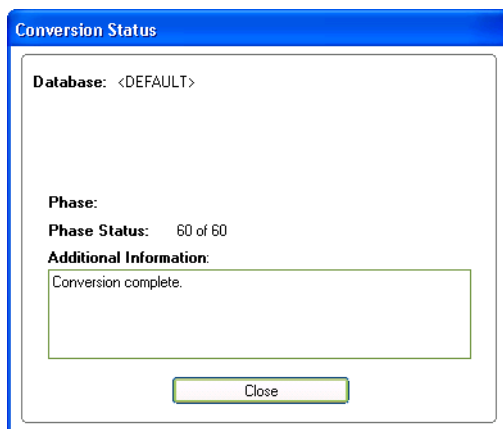


5. Review the Conversion Utility Performance dialog to estimate how long the database conversion will take.
6. Click the Next button. The Conversion Utility Summary dialog appears.



7. Review the Conversion Utility Summary dialog, and then click the Convert button.

The application checks your computer’s disk space to make sure there is sufficient space to convert your data. If there is sufficient space for the conversion, it begins to convert the database(s) and displays the Conversion Status message box.



When the conversion is complete, a “Conversion Complete” message appears in the Additional Information text box.

Step 5: Starting the Application

The Tracking program icon appears in the Sage Fixed Assets program group by default.

Note: You can also start the application by double-clicking the icon on your desktop.

To start the application

1. Click 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 from the Programs submenu.
3. Select the Tracking icon.

The system opens the application and displays the main window. If security is enabled, you must enter your user name and password.

To update your customer number

After you purchase the application, you will receive a customer number. You can enter your customer number so that it will be available if you need to call Customer Support with a question.

1. Select Help/Update User Information from the menu bar. A dialog appears that allows you to enter your customer number.

The screenshot shows a dialog box titled "Sage Fixed Assets - Tracking" with the subtitle "Update User Information". The dialog contains the following text and fields:

Stay connected with us by providing the information below. Please enter a value for each field then click OK to close. ?

Name:

Job Title:

Email:

Company:

Customer Number:

> [Where can I find my customer number?](#)

2. Enter your name, company name, and customer number, and then click OK.

To view your customer number

When you call Customer Support with a question, you will need your customer number. Follow the steps below to view your customer number.

1. Select Help/About Tracking from the menu bar. A dialog appears that provides information about your program, including your customer number.

Chapter 6

Installing Sage Fixed Assets—Planning the First Time

In this chapter:

Overview of the Install Process	6-1
Step 1: Installing the Latest Version	6-1
Step 2: Registering the Application	6-7
Step 3: Starting the Application	6-8

This chapter provides instructions for users who have never installed Sage Fixed Assets—Planning before. If you are currently using Sage Fixed Assets—Planning, please see [Chapter 7, “Installing Sage Fixed Assets—Planning: Upgrading from a Prior Version.”](#)

Overview of the Install Process

The install process consists of the following steps:

2. Installing the latest version, [page 6-1](#).
3. Registering the application, [page 6-7](#).
4. Starting the application, [page 6-8](#).

Step 1: Installing the Latest Version

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

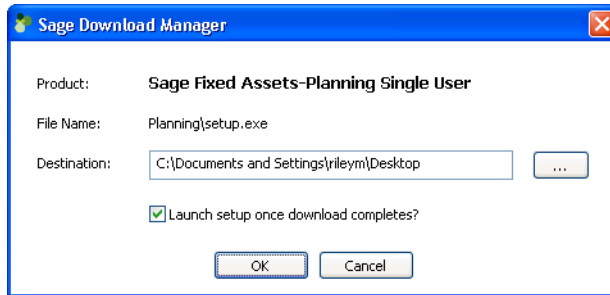
- Close all other Windows programs.
- Close all tool bars on your computer’s desktop (such as the Microsoft Office tool bar).
- Close all programs that run in the background after you start your computer (such as virus-checking programs).
- Make sure you have **Administrative rights** to the local computer.

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.

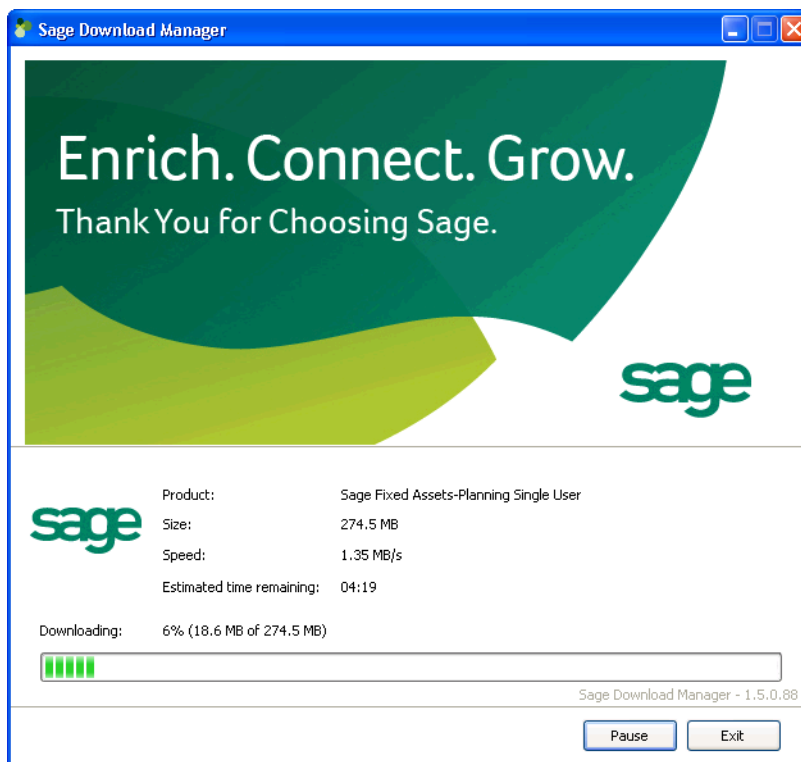
To start the install program

1. Point your browser to the Sage Customer Portal at:
<https://customers.sagenorthamerica.com>.
2. Click the Logon link and enter your Customer Logon information.
3. Click the Product Downloads link. The system opens a web page with downloads for system requirements, Sage Fixed Assets products, and their installation guides.

4. Click the Download link for the Planning Stand-Alone Desktop Edition.
5. Click the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

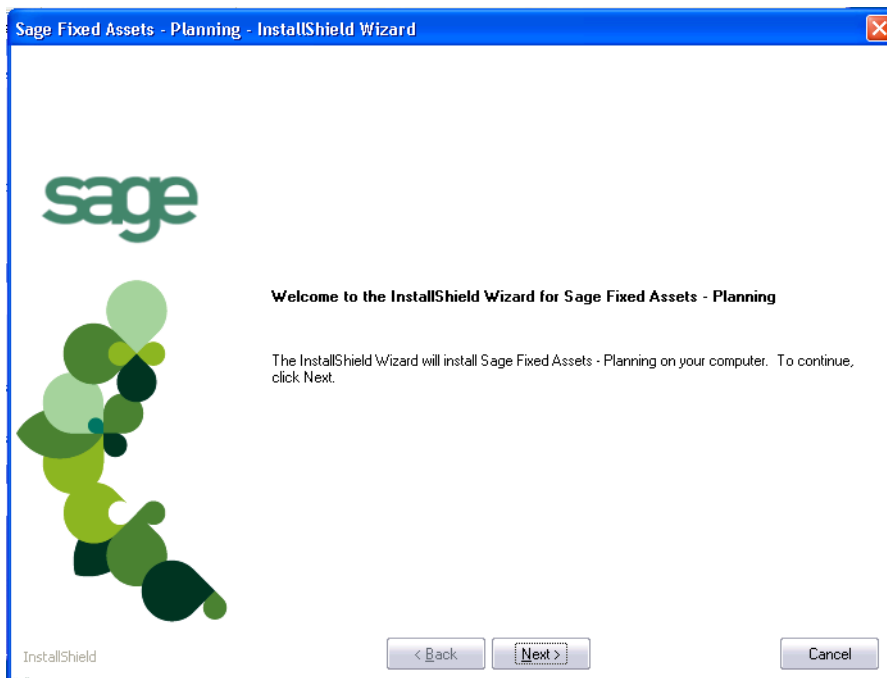


6. Click OK. The system begins to download the file.

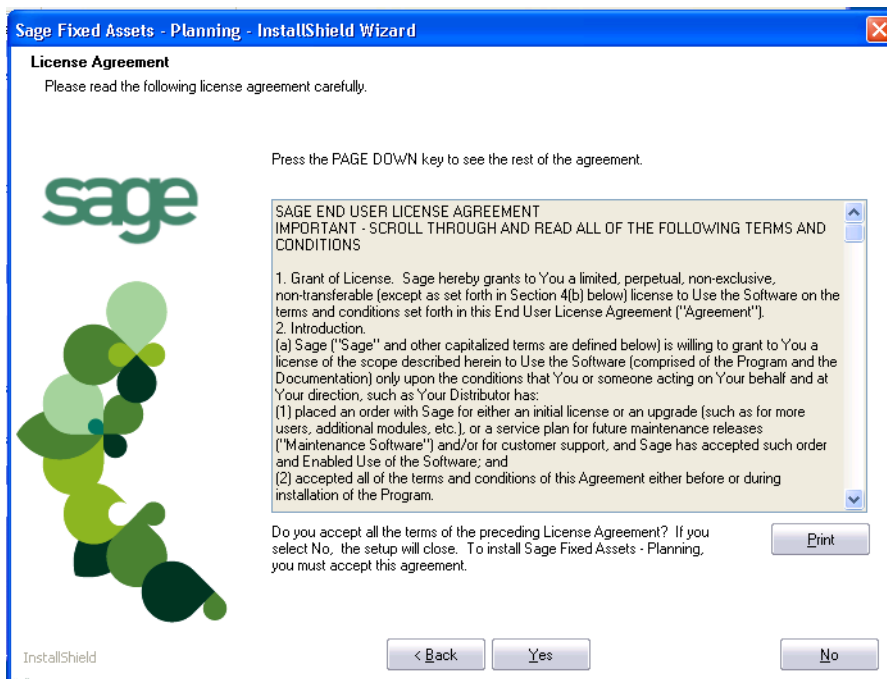


The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, and Microsoft Visual C++ 2005 Redistributables if it is not already installed.

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



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



■ **Print Button**

Click this button to send the license agreement to the default printer.

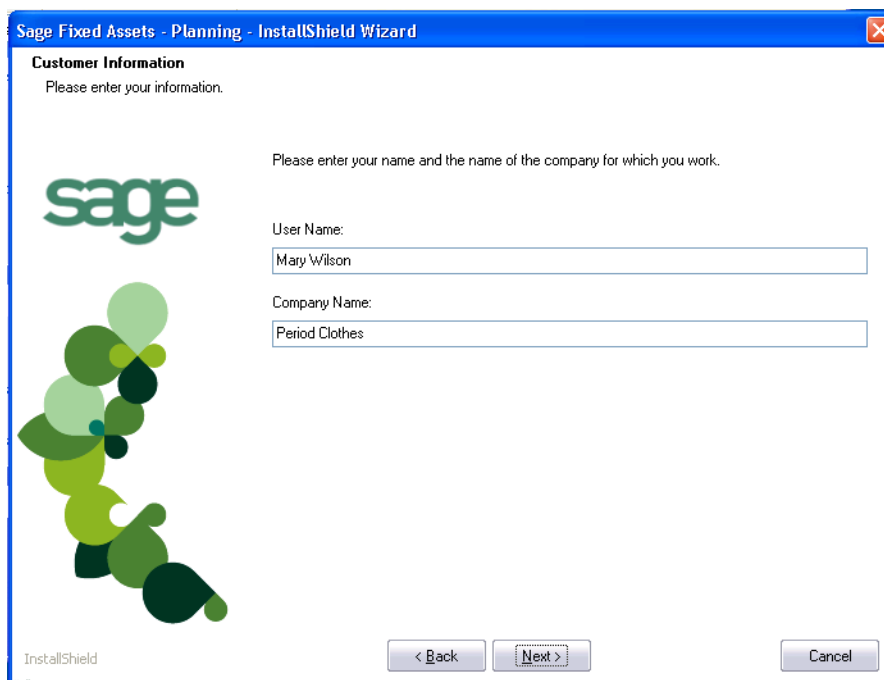
9. Read the license agreement, and then click the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, click the No button. The system exits from the installation program.)

10. After you click the Yes button, the Select Options dialog appears.

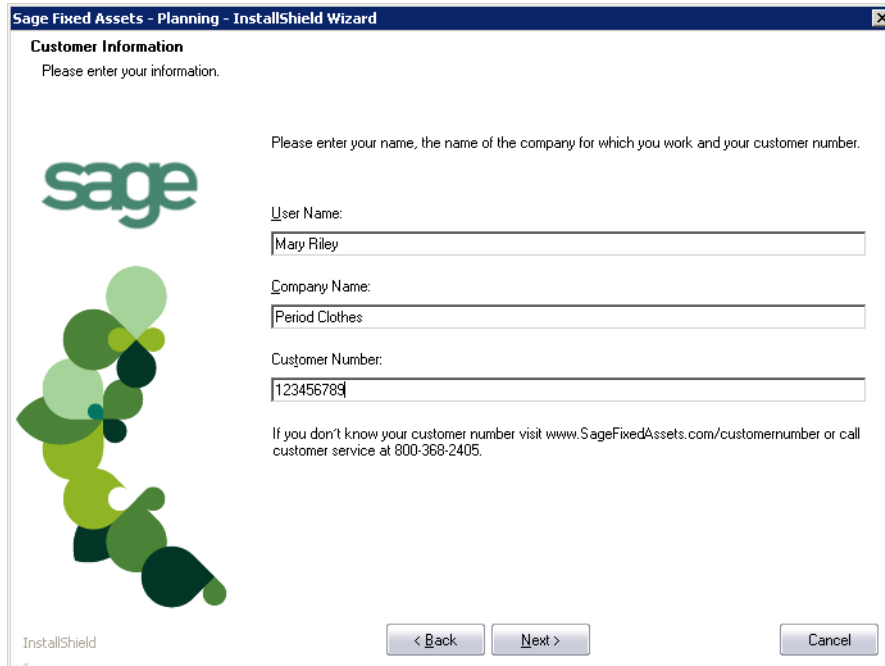


11. Select either the 30-day free trial option or the purchased option.

If you selected the 30-day free trial option, the following Customer Information dialog appears.



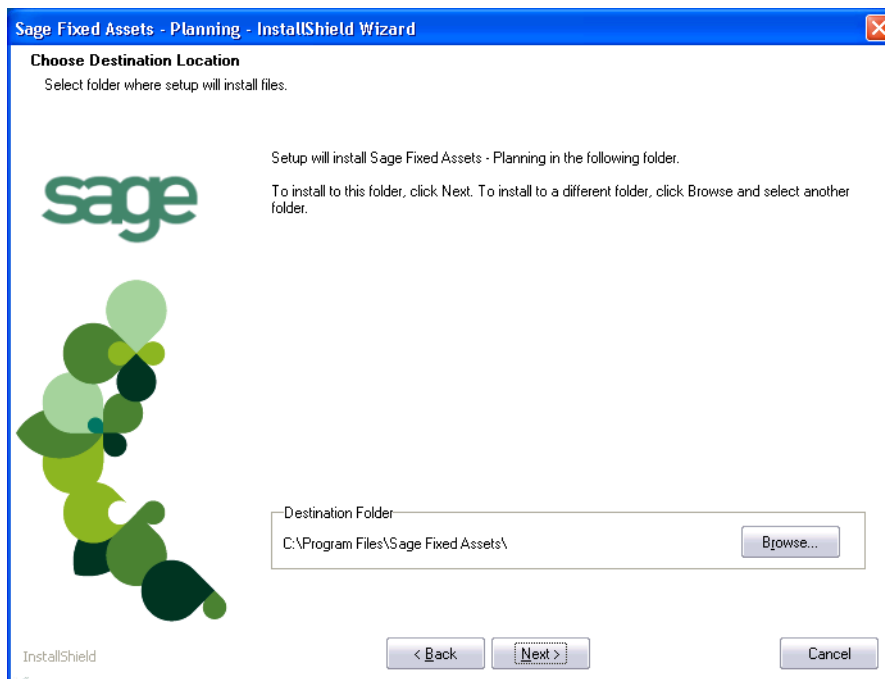
If you selected the purchased option, the following Customer Information dialog appears.



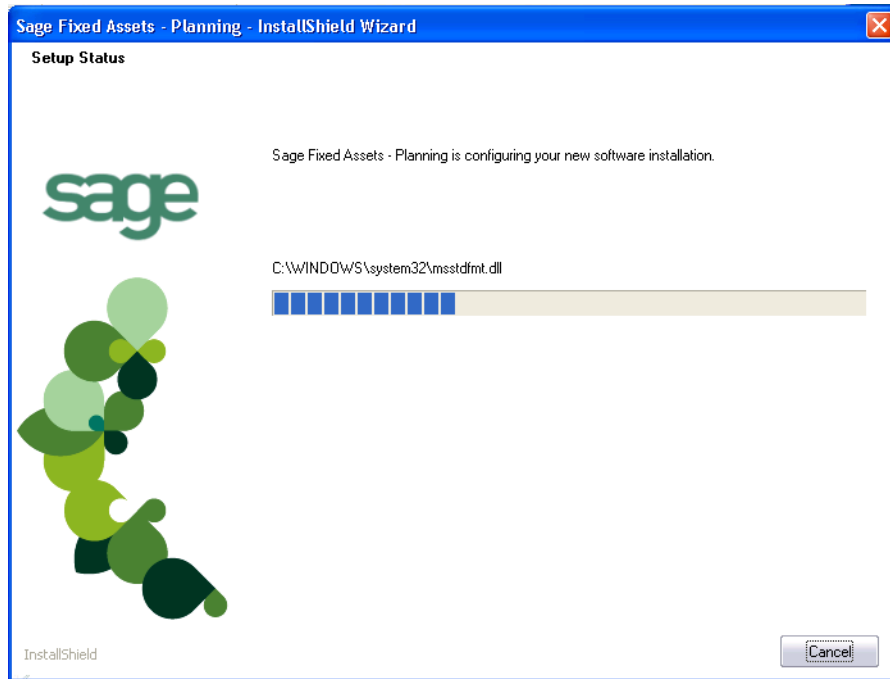
12. Enter your name, company name, and customer number if required. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

Note: You can find the customer number on the packing slip. If you cannot find your customer number, call Customer Service at 800-368-2405.

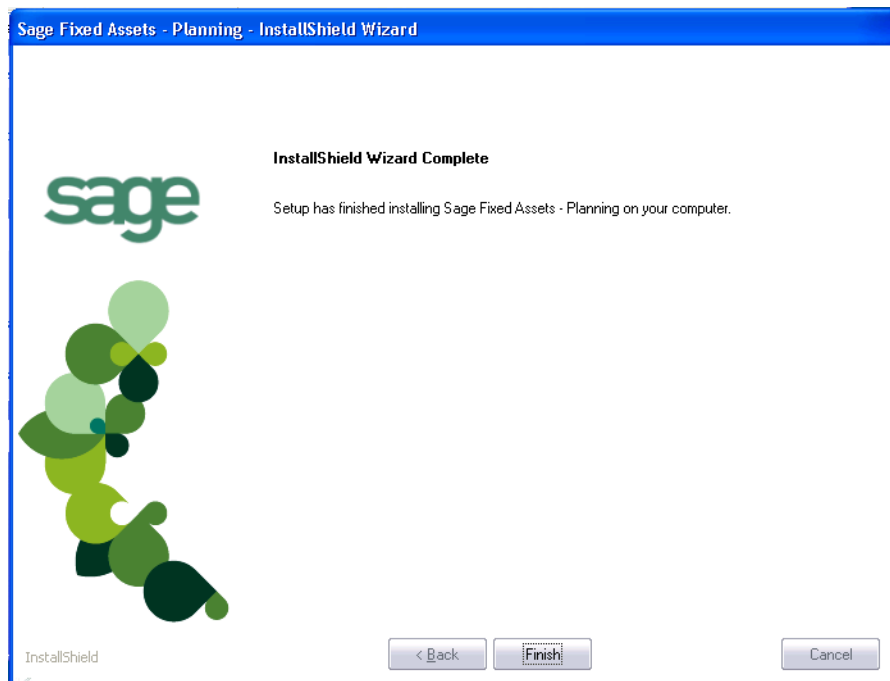
13. Click the Next button. The Choose Destination Location dialog appears.



14. Click the Next button. The system begins installing the software, and the Setup Status dialog appears.



When all of the 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 box. 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.

- Click the Finish button. The system returns to the Sage Fixed Assets installation dialog.

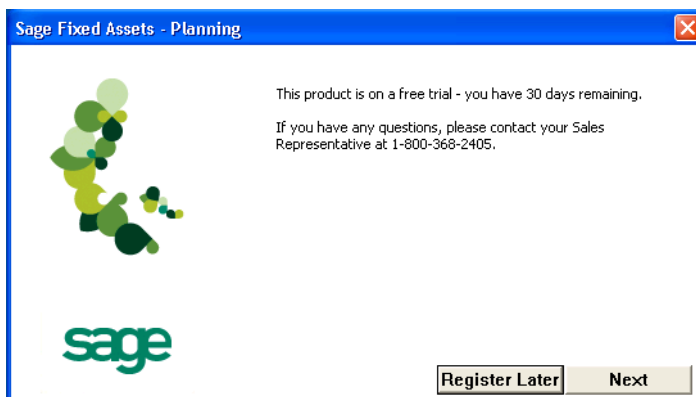
Step 2: Registering the Application

The process of registering the application is a one-time event. After you enter your registration codes, you won't have to enter them again—not even when you receive your next program update.

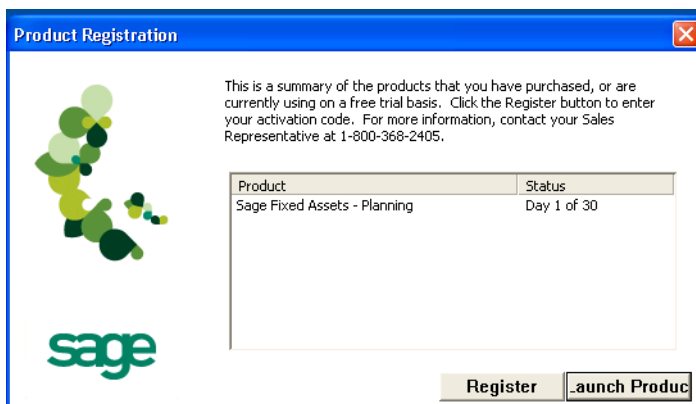
Note: You have 30 days to register the application.

To register the application

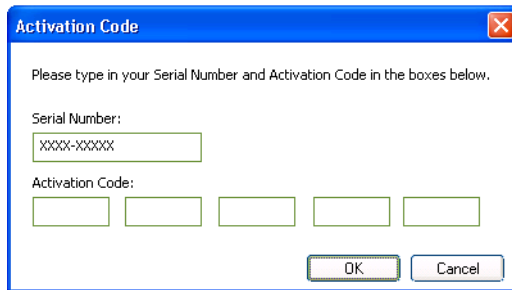
- Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
- Select the Sage Fixed Assets program group.
- Select the Planning icon. A message appears indicating you can use the application for 30 days.



- Click the Next button. The Product Registration dialog appears.



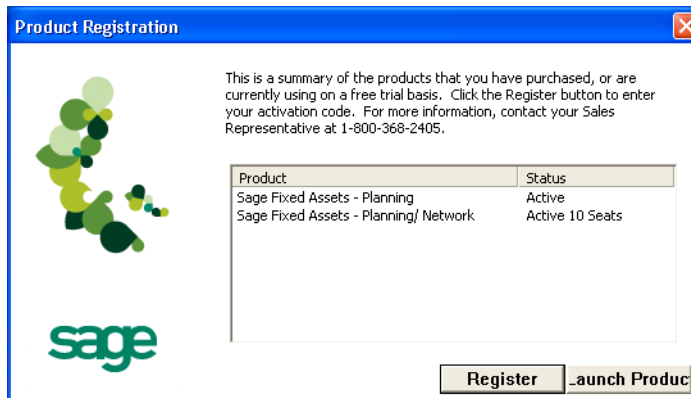
5. Click the Register button. A registration dialog appears allowing you to enter your Serial Number and Activation Code.



- **Serial Number**
Enter your serial number. **You must enter the hyphen.**
- **Activation Code**
Enter your activation code.

Please contact Customer Service at 800-368-2405 if you cannot find your serial number and activation code.

6. Click OK. The system returns to the Product Registration dialog.



Product	Status
Sage Fixed Assets - Planning	Active
Sage Fixed Assets - Planning/ Network	Active 10 Seats

7. Click the Launch Product button to start the application.

Step 3: Starting the Application

The Planning program icon appears in the Sage Fixed Assets program group by default.

Note: You can also start the application by double-clicking the icon on your desktop.

To start the application

Starting the purchased version

1. Click 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 from the Programs submenu.

3. Select the Planning icon.

The system opens the application and displays the main window. If security is enabled, you must enter your user name and password.

Starting the free trial version:

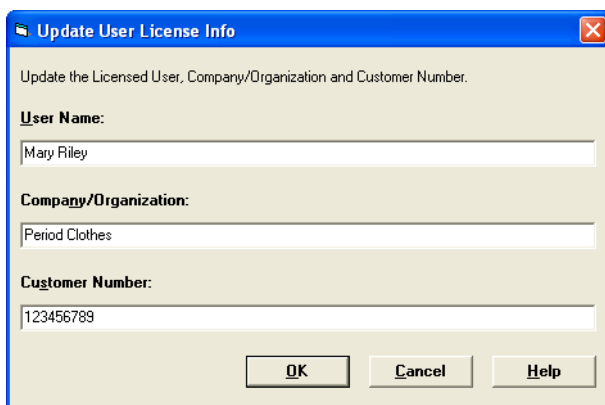
1. Click the Start button on the Windows taskbar, and then select Programs from the Start menu.
2. Select the Sage Fixed Assets program group from the Programs submenu.
3. Select the Planning icon. A message appears indicating you have 30 days to try the program.
4. Click the Register Later button.

The system opens the application and displays the main window.

To update your customer number

After you purchase the application, you will receive a customer number. You can enter your customer number so that it will be available if you need to call Customer Support with a question.

1. Select Help/Update User License Info from the menu bar. A dialog appears that allows you to enter your customer number.



Update User License Info

Update the Licensed User, Company/Organization and Customer Number.

User Name:
Mary Riley

Company/Organization:
Period Clothes

Customer Number:
123456789

OK Cancel Help

2. Enter your name, company name, and customer number, and then click OK.

To view your customer number

When you call Customer Support with a question, you will need your customer number. Follow the steps below to view your customer number.

1. Select Help/About Planning from the menu bar. A dialog appears that provides information about your program, including your customer number.

Chapter 7

Installing Sage Fixed Assets—Planning: Upgrading from a Prior Version

In this chapter:

Previous Versions Compatible with the Latest Version	7-1
Overview of the Upgrade Process	7-1
Step 1: Backing Up Your Data	7-2
Step 2: Installing the Latest Version	7-2
Step 3: Converting Your Data	7-7
Step 4: Starting the Application	7-13

This chapter provides instructions for upgrading from a previous version of Sage Fixed Assets—Planning.

Previous Versions Compatible with the Latest Version

You must be currently using the version 2013.1 of Sage Fixed Assets—Planning to follow the steps in this chapter. If you are not running the latest version, you will need to 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 2011 (Crystal Reports), which requires 2 GB of hard disk space. A previous version of Sage Fixed Assets—Reporting used Crystal Reports XI. If this version of Crystal Reports is still on your machine, we recommend that you uninstall it to avoid conflicts with the latest version.

Overview of the Upgrade Process

The upgrade process consists of the following steps:

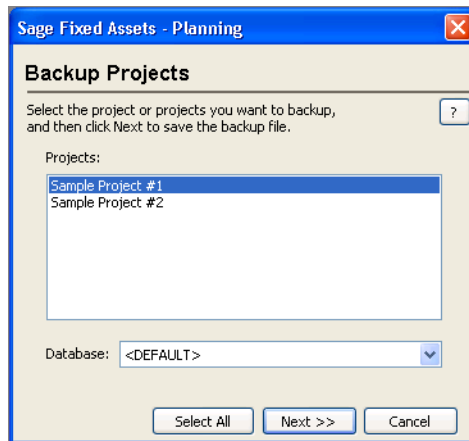
1. Backing up your current data, [page 7-2](#).
2. Installing the latest version, [page 7-2](#).
3. Converting your current data, [page 7-7](#).
4. Starting the application, [page 7-13](#).

Step 1: Backing Up Your Data

After you install the latest Sage Fixed Assets version, you cannot open your projects in a previous version of the application. You may want to back up your data before you install the latest version, in case you need to go back to a previous version.

To back up your database

1. Select Projects/Utilities/Backup from the menu bar. The system displays the Backup Projects dialog.



2. Select the database containing the project or projects you want to back up.

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

3. Select the project or projects that you want to back up.

Note: Click the Select All button to select all of the projects listed in the Projects field.

4. Click the Next button, and designate the destination directory, enter a file name for the backup file, and then click the Backup button.
5. After the backup is complete, click the Cancel button to close the Backup Projects dialog, or select another project to back up.

Step 2: Installing the Latest Version

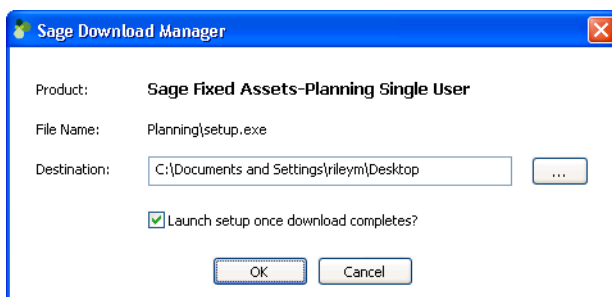
Before you begin to install the application, you should do the following:

- 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.

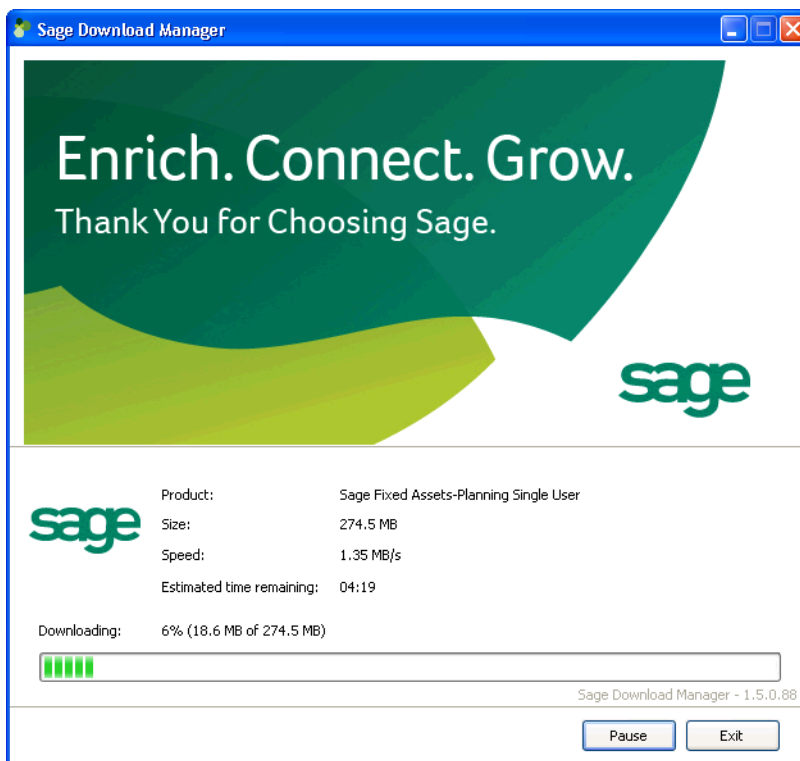
When installing the application, we recommend you accept the default options and directory locations the installation program provides. However, you can customize the installation to suit your needs by choosing the components you want to install.

To start the install program

1. Point your browser to the Sage Customer Portal at:
<https://customers.sagenorthamerica.com>.
2. Click the Logon link and enter your Customer Logon information.
3. Click the Product Downloads link. The system opens a web page with downloads for system requirements, Sage Fixed Assets products, and their installation guides.
4. Click the Download link for the Planning Stand-Alone Desktop Edition.
5. Click the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

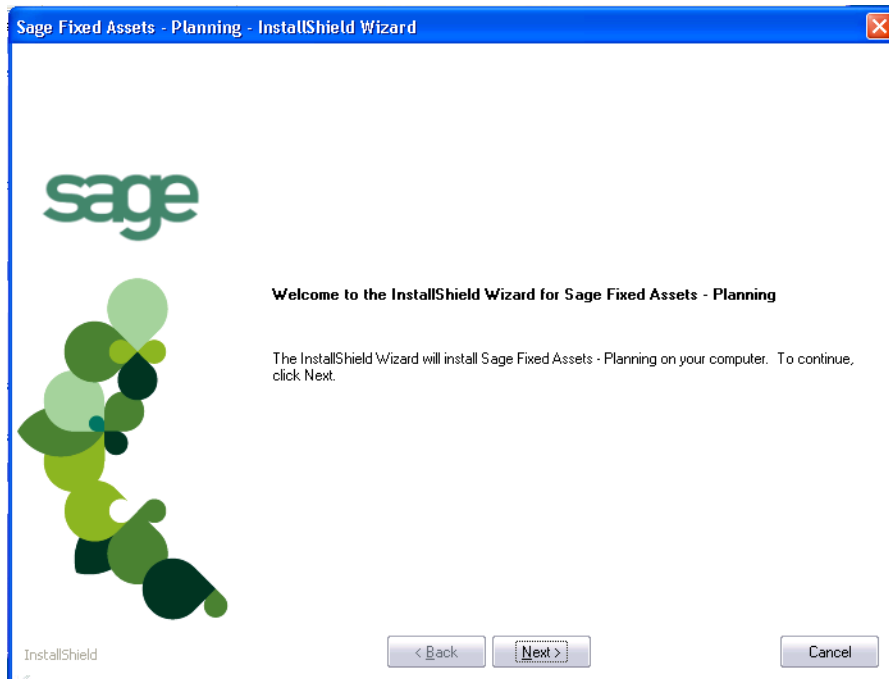


6. Click OK. The system begins to download the file.

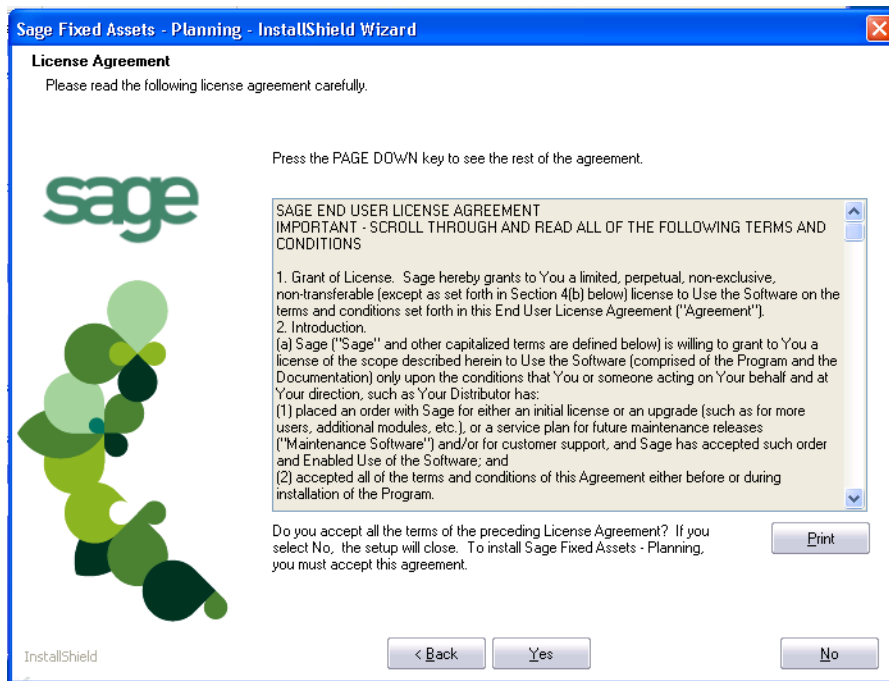


The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, and Microsoft Visual C++ 2005 Redistributables if it is not already installed.

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



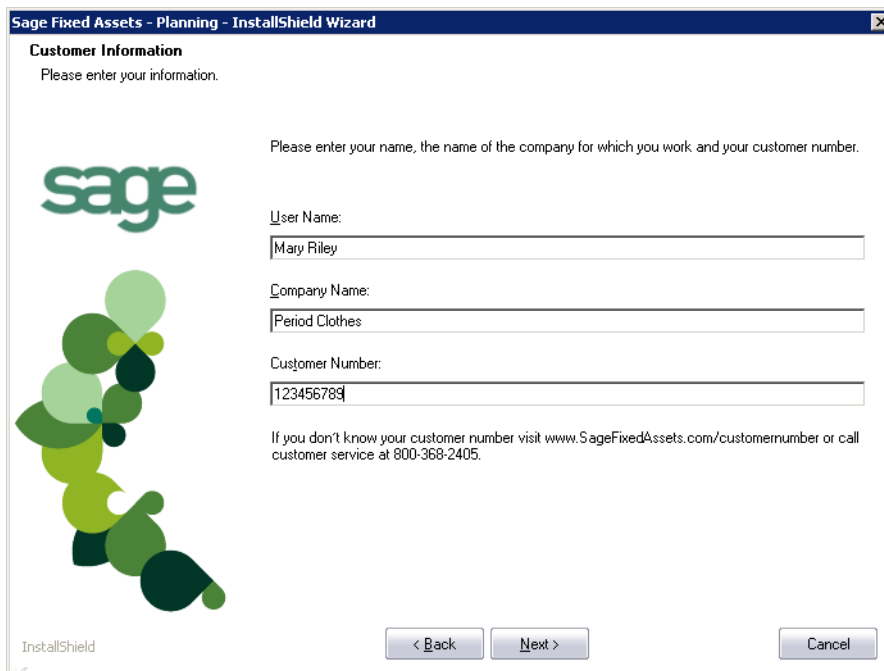
8. Click the Next button. The Software License Agreement dialog appears.



■ **Print Button**

Click this button to send the license agreement to the default printer.

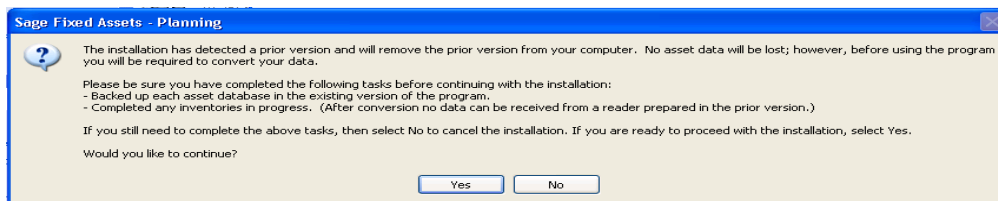
9. Read the license agreement, and then click the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, click the No button. The system exits from the installation program.)
10. After you click the Yes button, the Customer Information dialog appears.



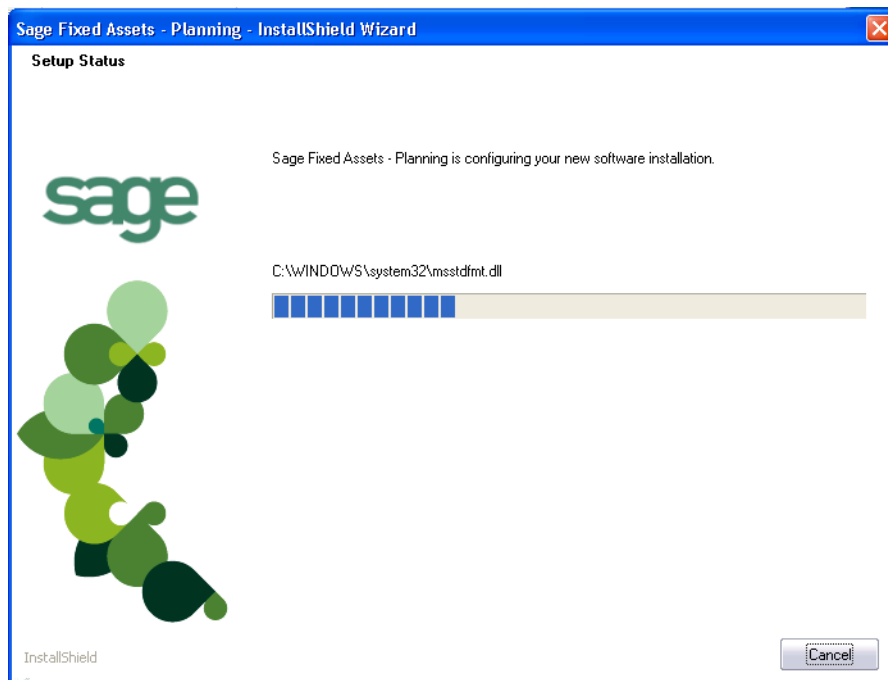
11. Enter your name, company name, and customer number. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

Note: You can find the customer number on the packing slip in the upgrade package by clicking About Planning from the Help menu. If you cannot find your customer number, call Customer Service at 800-368-2405.

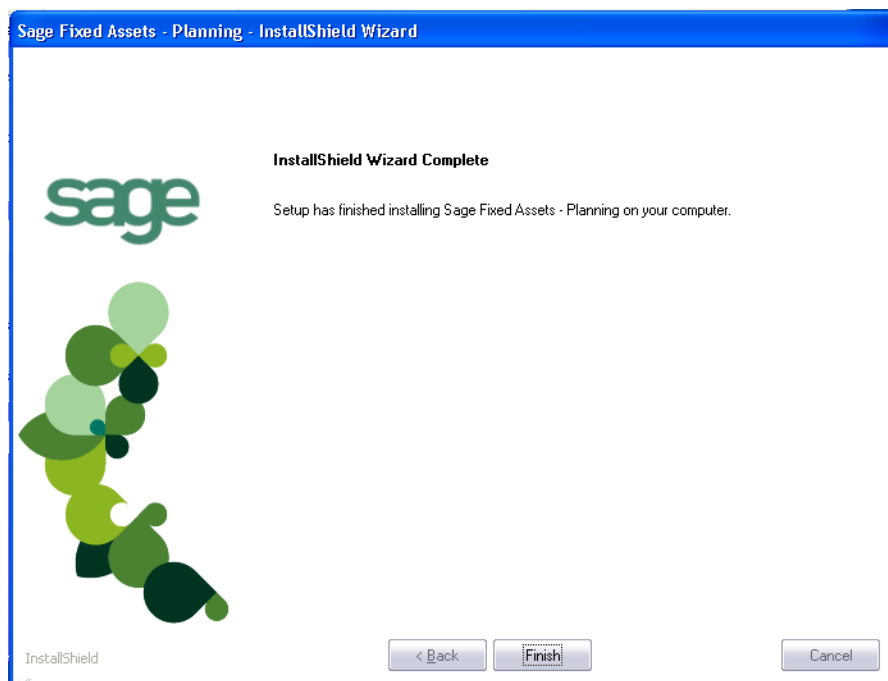
12. Click the Next button. A message appears indicating that a previous version of the program has been found on your computer.



13. Click Yes to remove the prior version of the application. The system begins installing the software, and the Setup Status dialog appears.



When all of the 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.

- Click the Finish button. The system returns to the Sage Fixed Assets installation dialog.

Step 3: Converting Your 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 asset database so that the system can store the new information. To update your database(s) to hold the new information, you must perform a database conversion.

Note: You must be currently using a version of Sage Fixed Assets—Planning that is compatible with the latest version to follow the steps in this section. For information about which versions are compatible with the latest version of the application, see [“Previous Versions Compatible with the Latest Version,”](#) page 7-1.

You have two options for converting your databases.

- Database Conversion Utility:** You can use the utility to convert two or more databases at a time. You run the utility from the Sage Fixed Assets program group.
- In-place Database Conversion:** You perform this type of database conversion when you open a database. You can convert only one database at a time with this type of conversion.

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

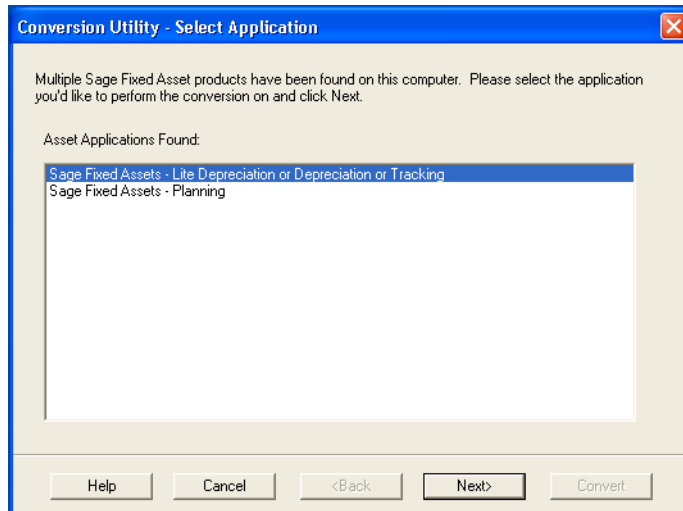
Converting a database is a time-consuming process. Please refer to the table below, which outlines the recommended conversion procedure:

Number of Databases	Number of Assets	Recommended Conversion Program
1	less than 3,000	In-place Database Conversion
1	3,000 or more	Database Conversion Utility
more than 1	any number	Database Conversion Utility

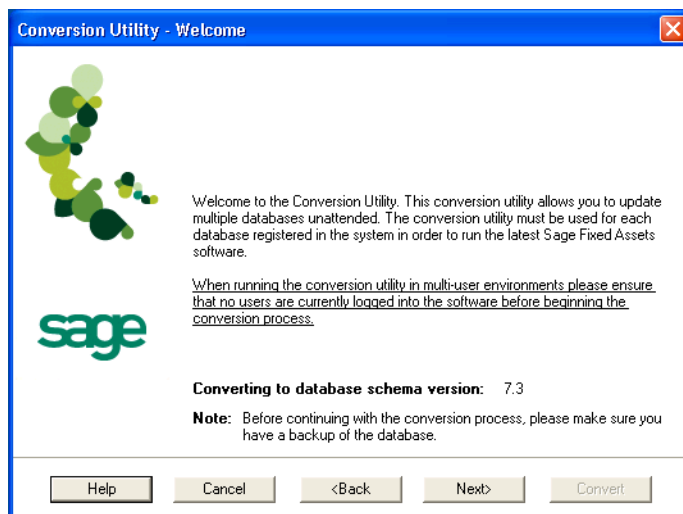
To use the Database Conversion Utility to convert databases

- Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
- Select the Sage Fixed Assets program group.
- Select the Tools program group.
- Select the Conversion Utility icon.

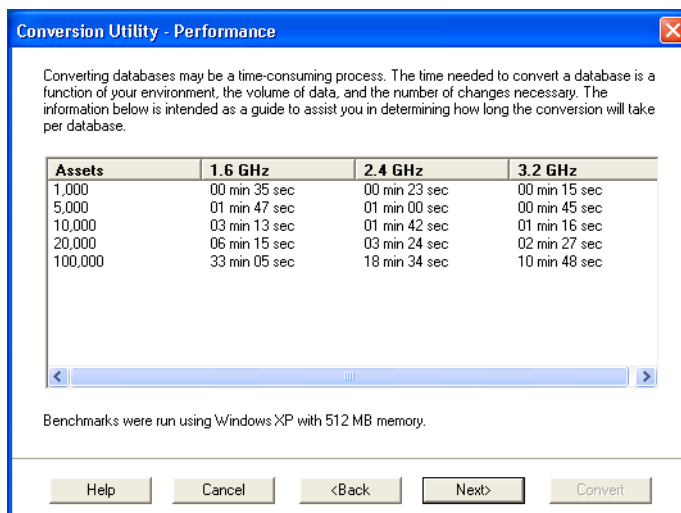
If more than one Sage Fixed Assets program is installed on your machine, the Conversion Utility Select Application dialog appears.



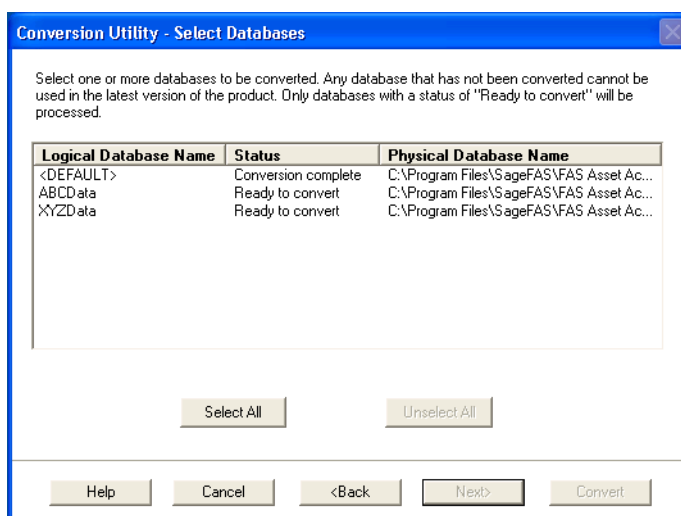
5. Select the Sage Fixed Assets program containing the database that you want to convert.
6. Click the Next button. The Conversion Utility Welcome dialog appears.



7. Click the Next button. The Conversion Utility Performance dialog appears.



8. Review the Conversion Utility Performance dialog to estimate how long the database conversion will take.
9. Click the Next button. The Conversion Utility Select Databases dialog appears.



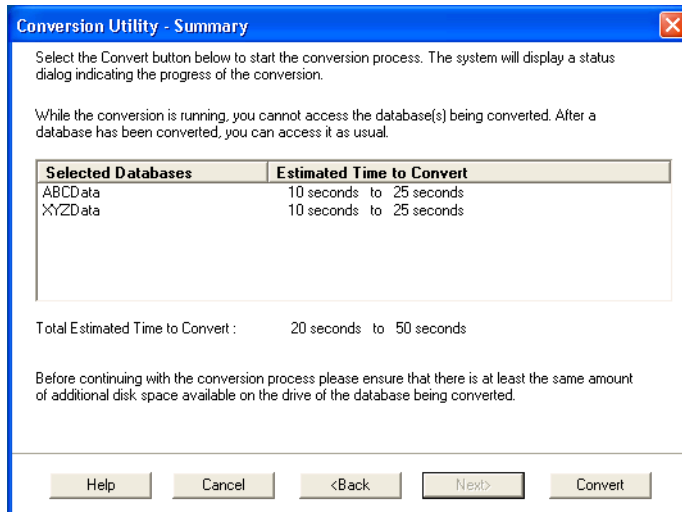
This dialog displays the status of each database.

- **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 information about which versions are compatible with the latest version of the application, see “[Previous Versions Compatible with the Latest Version](#),” page 7-1. For assistance in converting your databases, please contact Sage Fixed Assets Customer Support.

■ **Cannot Open**

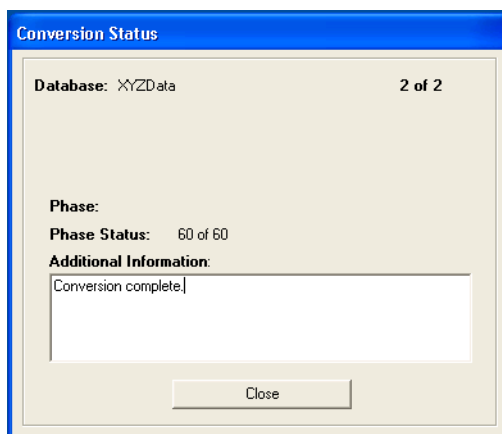
This status indicates that the database cannot be converted for an unknown reason. The database may have been moved and the system cannot locate it, or the database may be corrupted. For assistance in resolving the problem, please contact Sage Fixed Assets Customer Support.

10. Select the database(s) that you want to convert, and then click the Next button. The Fixed Assets Database Conversion Summary dialog appears.



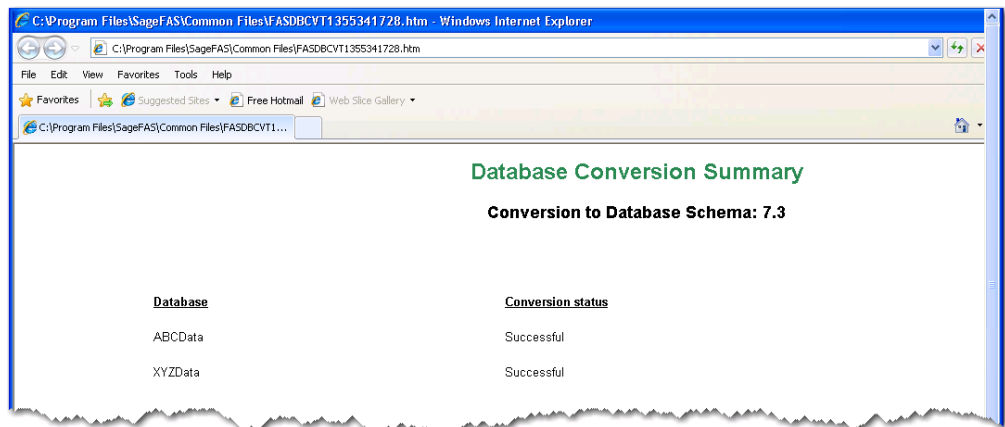
11. Review the Conversion Utility Summary dialog, and then click the Convert button.

The system checks your computer’s disk space to make sure there is sufficient space to convert your data. The conversion requires three to four GB of disk space. If there is sufficient space for the conversion, it begins to convert the database(s) and displays the Conversion Status message box.



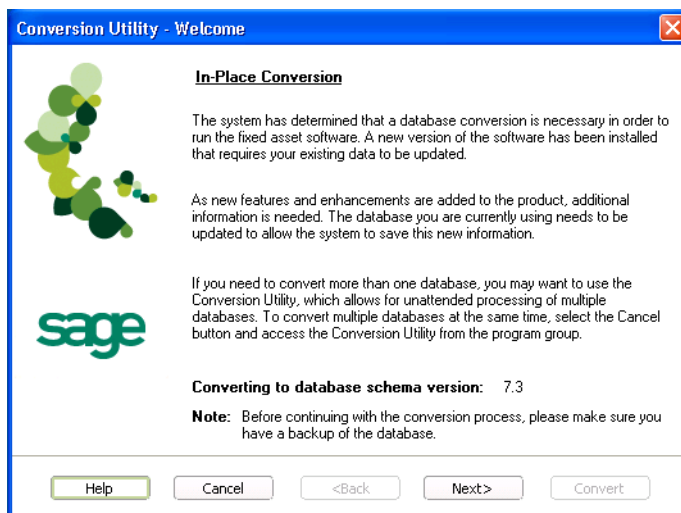
When the conversion is complete, a “Conversion Complete” message appears in the Additional Information text box.

- Click the Close button. The system displays the Database Conversion Summary report, which indicates whether the conversion was successful for each database.

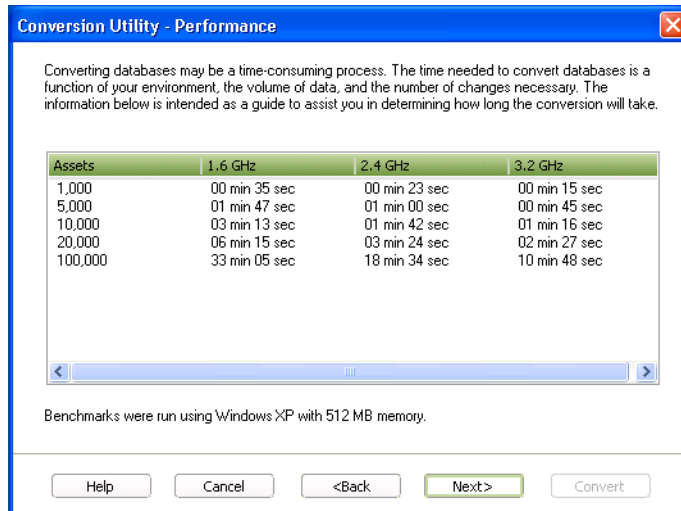


To perform an in-place database conversion

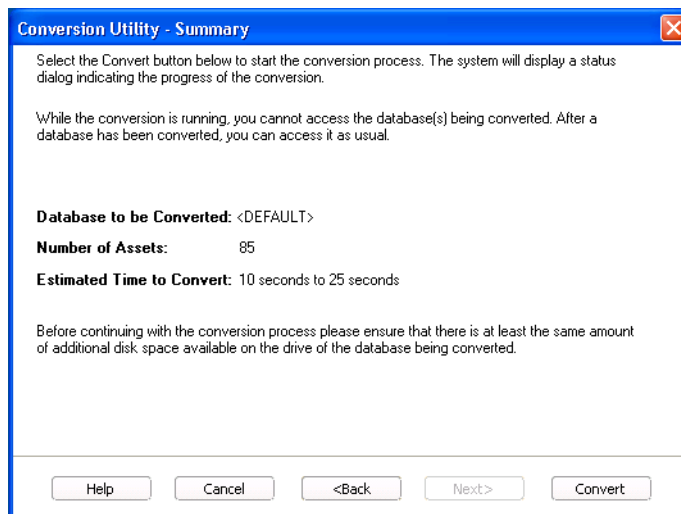
- Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
- Select the Sage Fixed Assets program group.
- Select the Planning icon. The application attempts to open a database that must be converted. The Conversion Utility Welcome dialog appears.



- Click the Next button. The Conversion Utility Performance dialog appears.

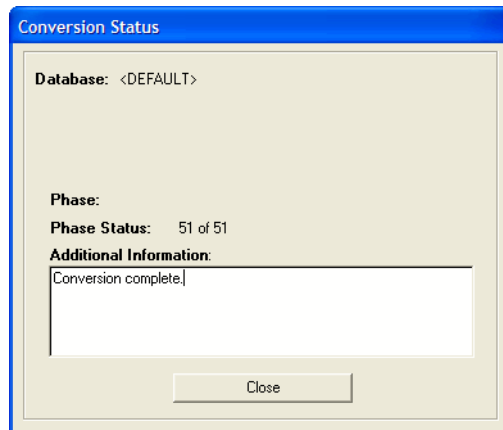


5. Review the Conversion Utility Performance dialog to estimate how long the database conversion will take.
6. Click the Next button. The Conversion Utility Summary dialog appears.



7. Review the Conversion Utility Summary dialog, and then click the Convert button.

The application checks your computer's disk space to make sure there is sufficient space to convert your data. If there is sufficient space for the conversion, it begins to convert the database(s) and displays the Conversion Status message box.



When the conversion is complete, a "Conversion Complete" message appears in the Additional Information text box.

Step 4: Starting the Application

The Planning program icon appears in the Sage Fixed Assets program group by default.

Note: You can also start the application by double-clicking the icon on your desktop.

To start the application

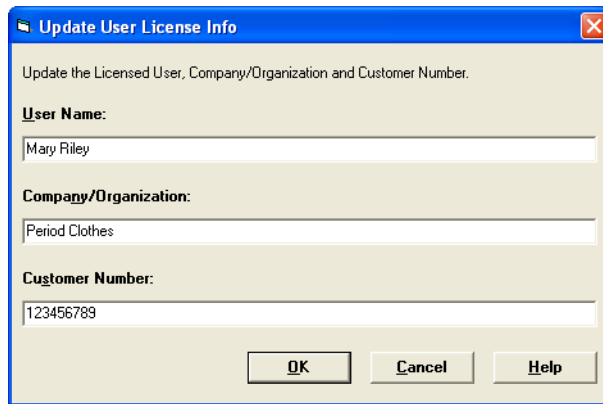
1. Click the Start button on the Windows taskbar, and then select Programs (or All Programs) from the Start menu.
2. Select the Sage Fixed Assets program group from the Programs submenu.
3. Select the Planning icon.

The system opens the application and displays the main window. If security is enabled, you must enter your user name and password.

To update your customer number

After you purchase the application, you will receive a customer number. You can enter your customer number so that it will be available if you need to call Customer Support with a question.

1. Select Help/Update User License Info from the menu bar. A dialog appears that allows you to enter your customer number.



The screenshot shows a dialog box titled "Update User License Info". The dialog contains the following text and fields:

- Update the Licensed User, Company/Organization and Customer Number.
- User Name:** Mary Riley
- Company/Organization:** Period Clothes
- Customer Number:** 123456789

At the bottom of the dialog are three buttons: **OK**, **Cancel**, and **Help**.

2. Enter your name, company name, and customer number, and then click OK.

To view your customer number

When you call Customer Support with a question, you will need your customer number. Follow the steps below to view your customer number.

1. Select Help/About Planning from the menu bar. A dialog appears that provides information about your program, including your customer number.

Chapter 8

Installing Sage Fixed Assets—Reporting

In this chapter:

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Note: The latest version of Sage Fixed Assets—Reporting uses SAP® Crystal Reports 2011 (Crystal Reports), which requires 2 GB of hard disk space. A previous version of Sage Fixed Assets—Reporting used Crystal Reports XI. If this version of Crystal Reports is still on your machine, we recommend that you uninstall it to avoid conflicts with the latest version.

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: 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 2011 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:

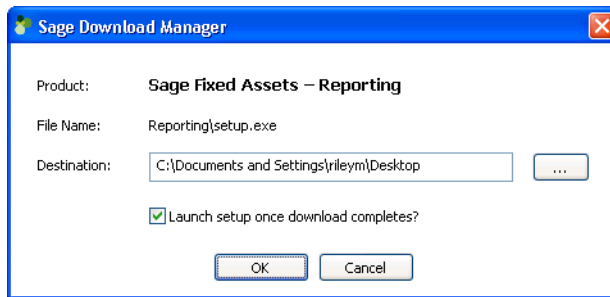
- Close all other Windows programs.
- Close all tool bars on your computer's desktop (such as the Microsoft Office tool bar).
- Close all programs that run in the background after you start your computer (such as virus-checking programs).
- Make sure you have **Administrative rights** to the local computer.

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.

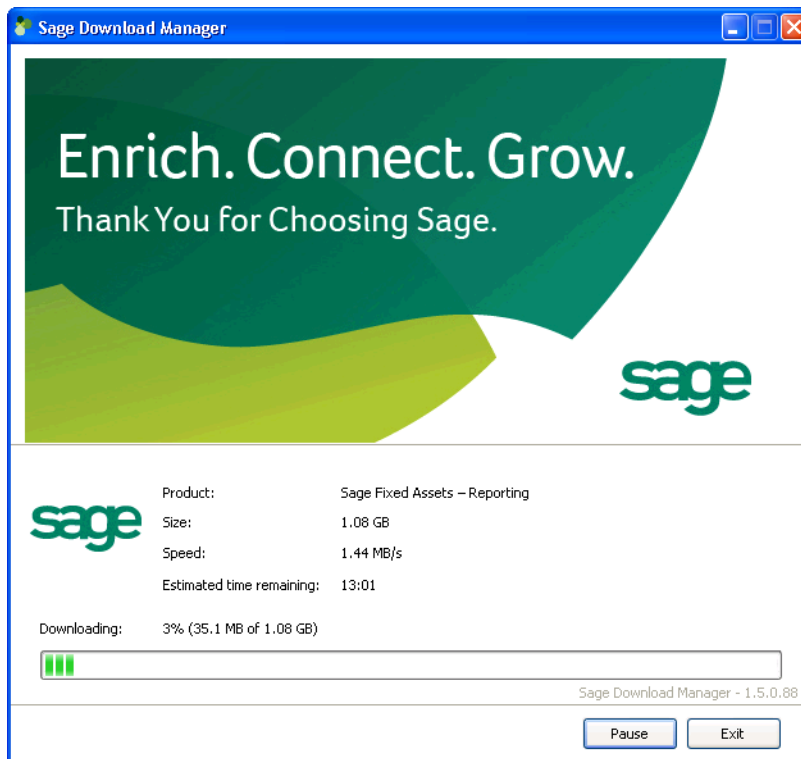
To start the install program

1. Point your browser to the Sage Customer Portal at:
<https://customers.sagenorthamerica.com>.
2. Click the Logon link and enter your Customer Logon information.
3. Click the Product Downloads link. The system opens a web page with downloads for system requirements, Sage Fixed Assets products, and their installation guides.
4. Click the Download link for the Reporting Stand-Alone Desktop Edition.

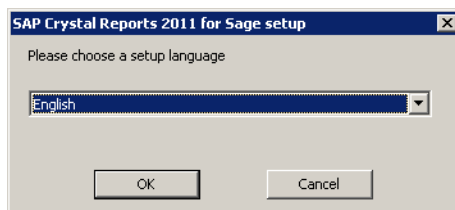
5. Click the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.



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

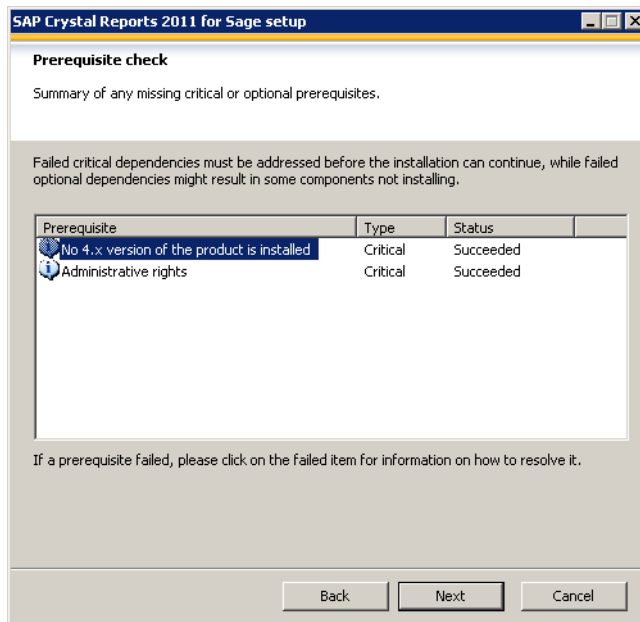


The SAP Crystal Reports 2011 for Sage setup language dialog appears.

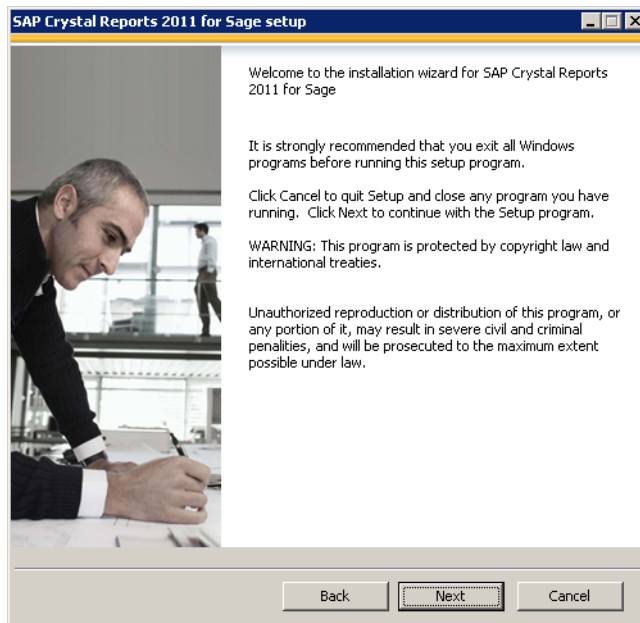


7. Select English from the drop-down list and click OK.

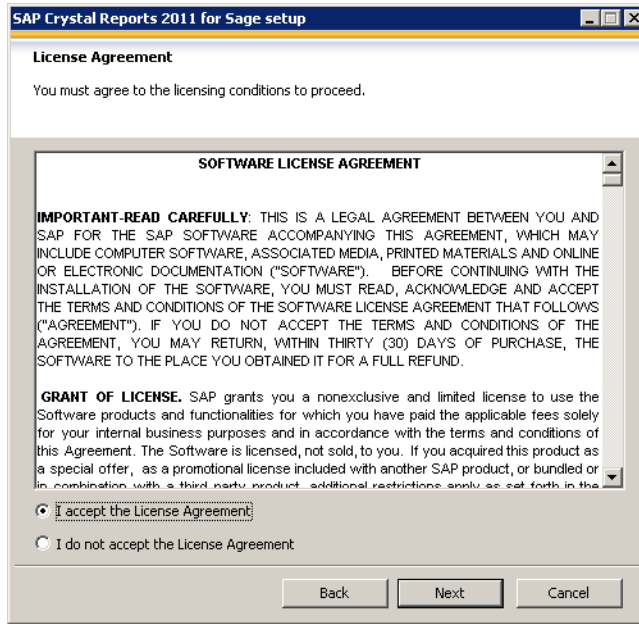
- The system checks for critical prerequisites and displays the summary on the Prerequisite Check dialog.



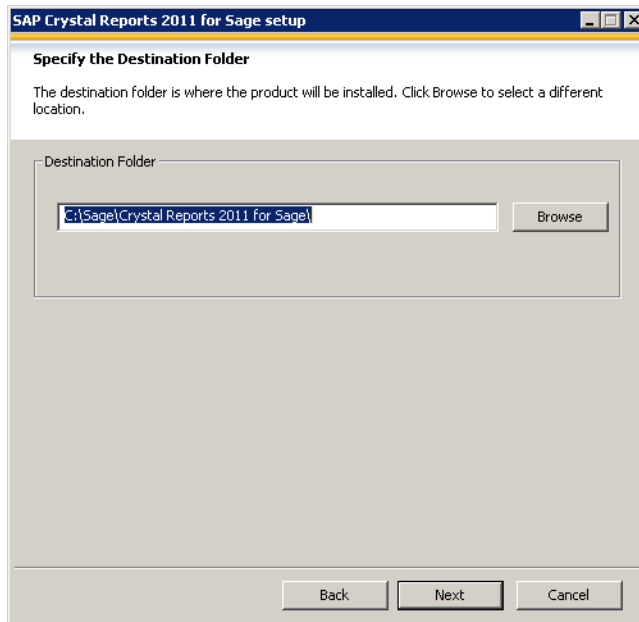
- Click on the failed prerequisite, if any, for information how to resolve it. Otherwise, click the Next button to continue. The Welcome dialog appears.



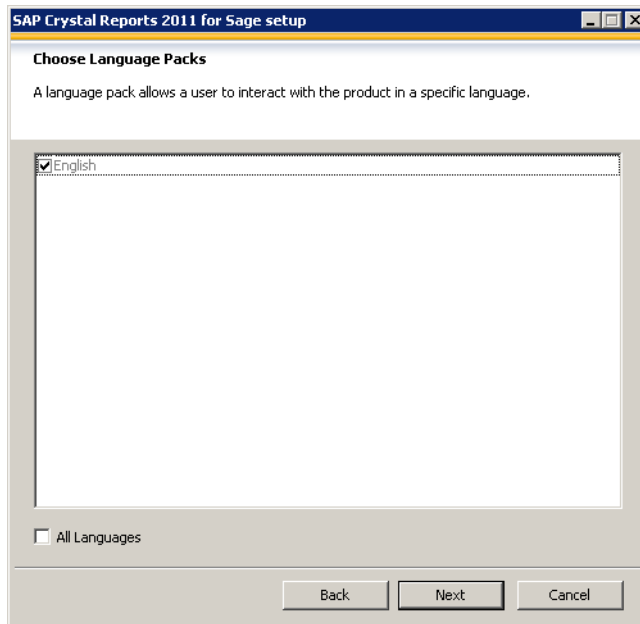
- Click the Next button. The system displays the License Agreement.



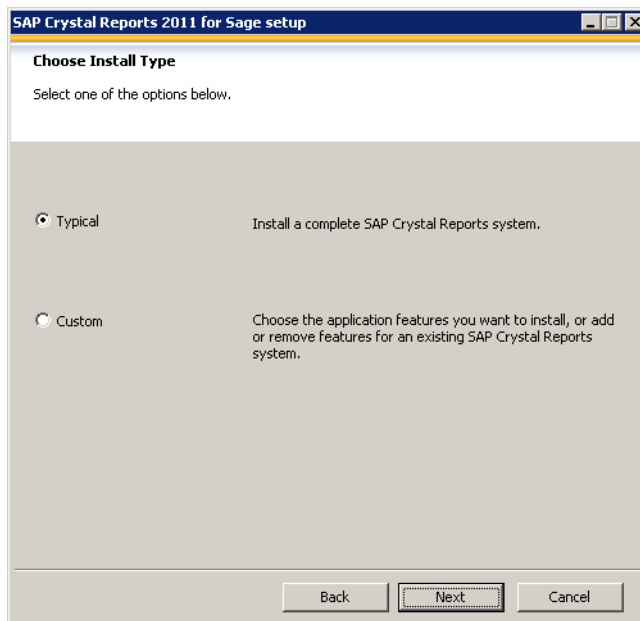
11. Select the I Accept the License Agreement option button, and then click the Next button. The system displays the Specify the Destination Folder dialog.



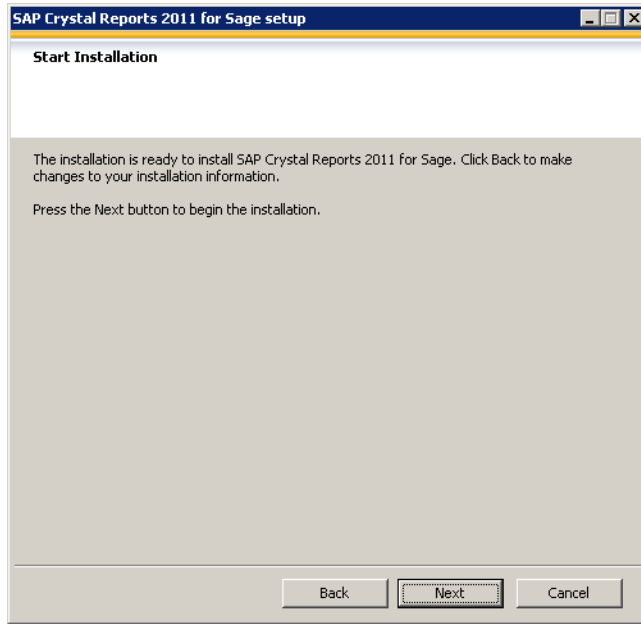
12. Select the folder in which to install the program, and then click the Next button. The system displays the Choose Language Packs dialog.



13. Make sure that the checkbox for the English language is selected, and then click the Next button. The system displays the Choose Install Type dialog.



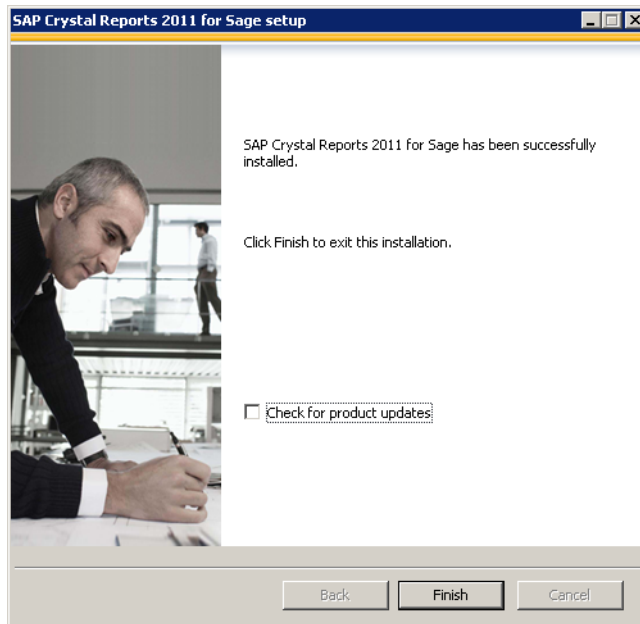
14. Leave the Typical option selected, and then click the Next button. The system displays the Start Installation dialog.



15. Click the Next button. The system begins installing the program and displays the installation progress dialog.



16. When the installation is complete, a message indicates the installation has been completed successfully.



17. Clear the Check for Product Updates button.
18. Click 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*.

Appendix A

How to Contact Us

Here are some of the quickest ways to contact us if you have a question about operating the program, or if you need assistance in purchasing a Sage Fixed Assets product.

Customer Support	Phone: 800-331-8514 (see the website for support hours) FAX: 800-793-2329 (24 hours) email: FixedAssetsSupport@sage.com website: www.SageFixedAssets.com/support Customer number required
Sales	800-368-2405 (8:30 a.m.—5:30 p.m. ET) To enroll in or renew Sage Business Care
Website	www.SageFixedAssets.com

Sage Fixed Assets operates a website for our customers at www.SageFixedAssets.com. You can quickly access various pages on this website within the application by selecting Help/Contact Us from the menu bar.

To contact Sage Fixed Assets

1. Select Help/Contact Us from the menu bar. The Contact Us dialog appears.
2. Click on a link to receive customer support, find information about training opportunities, view online demos of our products, purchase barcode labels or barcode hardware, or to send us a product suggestion.

Appendix B

Troubleshooting

In this appendix:

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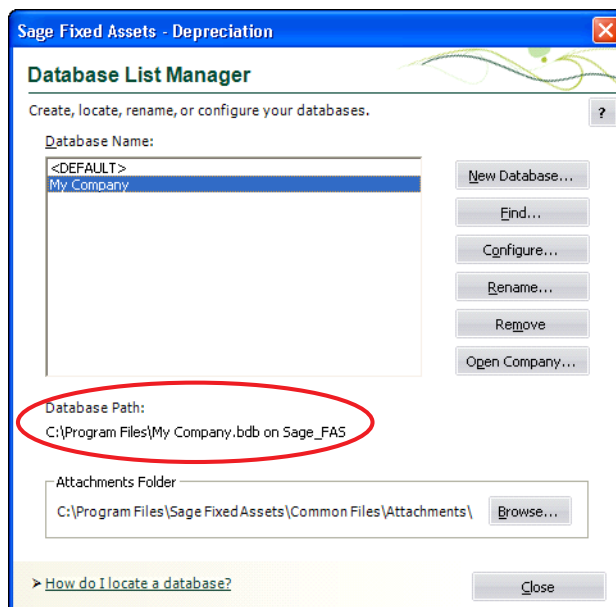
Moving and Reconfiguring Databases

Due to changes in the Windows Vista, Windows 7, and Windows 8 operating systems, you may have to change the location of your Sage Fixed Assets asset databases.

If you have a database located in a virtualized location, you will need to move it to a new location and update the location information in Database List Manager. The virtualization feature occurs in the C:\Windows and C:\Program Files folders.

To determine if you need to move your databases

1. Open your existing Sage Fixed Assets application and select File\Database List Manager from the menu bar.



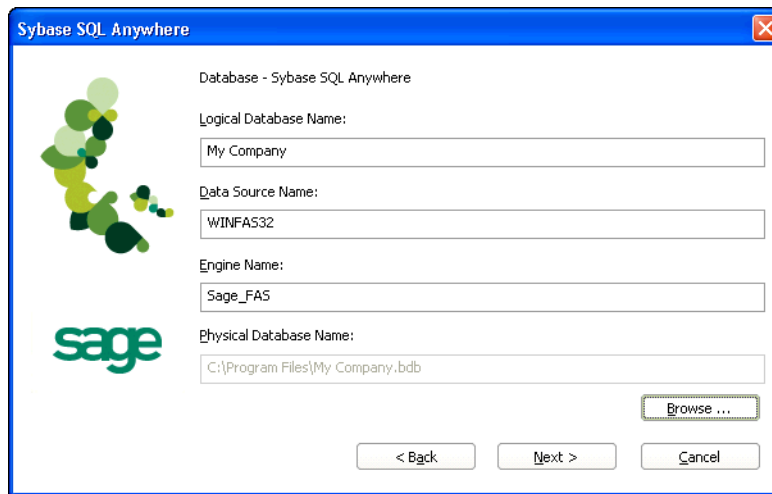
2. Select each database and review the Database Path information to determine the location of the physical database file.
3. If the database file is located in C:\Program Files\Sage Fixed Assets or any other non-virtualized location outside of My Documents, then close the application. You are ready to install the latest version and operate the program under Windows Vista, Windows 7, or Windows 8.

4. If the database is located in a virtualized location (i.e., C:\Windows or C:\Program Files), or a folder within My Documents, you will need to move the database. Close the application and continue with step 5 below.

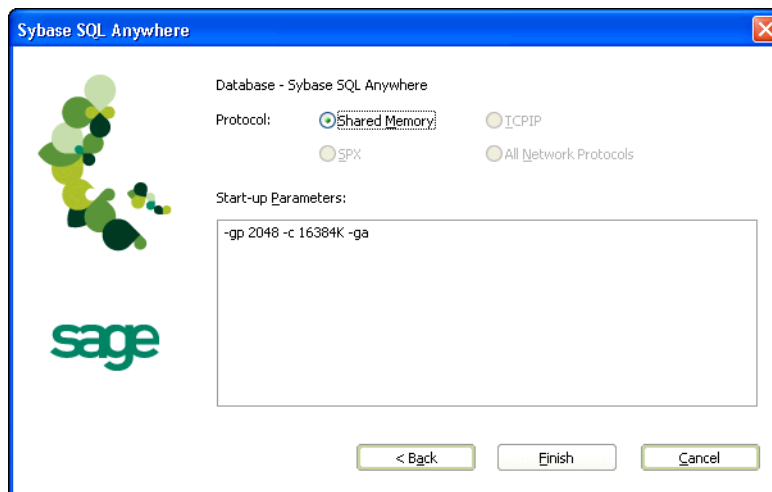
If databases are in an unsupported Windows Vista, Windows 7, or Windows 8 location

For any database located in a virtualized location, use Windows Explorer to move the physical files to a non-virtualized location. We recommend using the Data folder or any other subfolder created under the Sage Fixed Assets installation directory. For any databases previously located in the My Documents folder, you will need to confirm the current location of the physical database file under C:\Users.

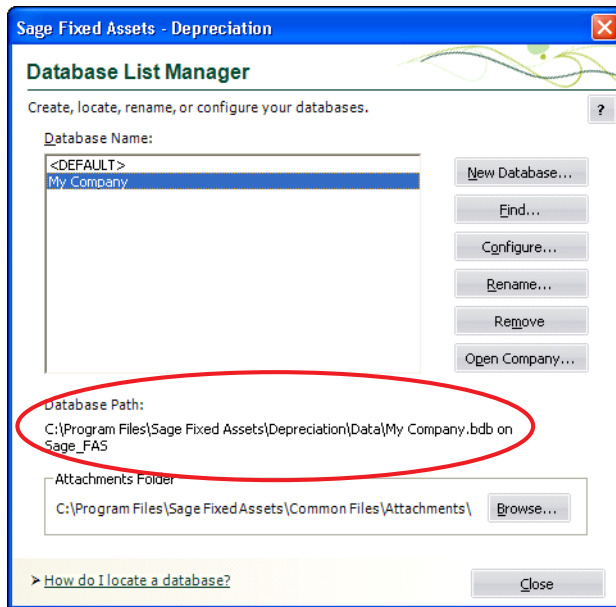
5. Open your Sage Fixed Assets application and access Database List Manager.
6. Select the database that has been moved to a new location and click the Configure button.



7. Click the Browse button to locate the newly located database and update the Physical Database Name location.
8. Click the Next button to move to the second panel of the Configure wizard.



- Click the Finish button to return to the Database List Manager dialog. Notice that the Database Path information has been updated.



- Repeat this process for each database that has been moved to a new location.

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800.761.3037 acutedata.com