



Sage Fixed Assets

for Depreciation, Tracking, Planning, and Reporting

Premier Installation 2015.2

SQL Server Administrator Guide

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Rev 02

Sage Fixed Assets

Premier Installation Guide

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Chapter 1

Introduction

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

- Sage Fixed Assets—Premier Depreciation
- Sage Fixed Assets—Premier Tracking
- Sage Fixed Assets—Premier 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 Premier Edition](#) article in the Sage Knowledgebase for the latest system requirements. The requirements listed here are the *minimum* requirements. As is true of all software products, enhancing your hardware and application software may improve performance.

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

Security Requirements

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

Installation

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

During the installation of the network client, the client machine will need **Read** access to the FASServ directory. After you install the server components, make sure that you share the FASServ directory and not just its subdirectories.

Microsoft SQL Server Requirements

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

- You must use Mixed Mode Authentication when connecting to Microsoft SQL Server. You select Mixed Mode Authentication when you install Microsoft SQL Server. For more information about using Mixed Mode Authentication (rather than Windows Authentication Mode), please refer to your Microsoft SQL Server documentation.
- The Sage Fixed Assets application supports **multiple instances** of Microsoft SQL Server. The first time you launch the Database Utility, the application prompts you to create a system configuration database. You can select the desired SQL Server instance when you create the system configuration database.

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

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

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

- The Microsoft SQL Server service must be started and running before execution of the installation application or the Database Utility.
- The Sage Fixed Assets application requires that the following Server Collation settings be applied:

Server Collation: SQL_Latin1_General_CP1_CI_AS (1252)

Character Set: ISO

Sage Fixed Assets Checklist

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

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

- Have you backed up your existing data (current users only) using the application's backup utility? (To back up your data, select File/Company Utilities/Backup Company from the menu bar.)

Location of backup _____

Microsoft SQL Server Checklist

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

- Are you installing on a server that meets the minimum hardware requirements for Sage Fixed Assets?
- Is your **tempdb** for Microsoft SQL Server configured with a size of at least 100 MB, and is the tempdb located on a device other than the master device?
- Have you configured Microsoft SQL Server to meet the configuration settings?
Server Collation: SQL_Latin1_General_CP1_CI_AS_(1252)
Character Set: ISO
- Have you backed up your master database as well as any other existing databases on the file server on which you plan to install the Sage Fixed Assets application? In the event of a Microsoft SQL Server failure, you may need to restore the databases from a backup.
- Have you closed all other Windows applications, including virus-checking software, before you begin the installation?

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

Chapter 2

Installing Sage Fixed Assets - Premier Server the First Time

In this chapter:

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Overview of the Install Process

The install process consists of the following steps:

1. Installing the Sage Fixed Assets server components, [page 2-1](#).
2. Creating the configuration database, [page 2-7](#).
3. Creating an asset database, [page 2-10](#).
4. Sharing the SFAServ folder, [page 2-14](#).
5. Setting up the Attachments folder for PDFs, [page 2-15](#).
6. **Optional:** Installing the Sage Fixed Assets—Reporting server components, [page 2-16](#).
7. Registering the application, [page 2-18](#).
8. **Optional:** Mapping a drive to the SFAServ folder, [page 2-21](#).

Step 1: Installing the Sage Fixed Assets Server Components

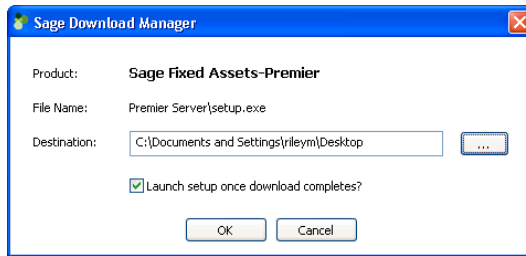
In this step, you install the server components on the server machine for the following applications:

- Sage Fixed Assets—Premier Depreciation
- Sage Fixed Assets—Premier Tracking
- Sage Fixed Assets—Premier Planning

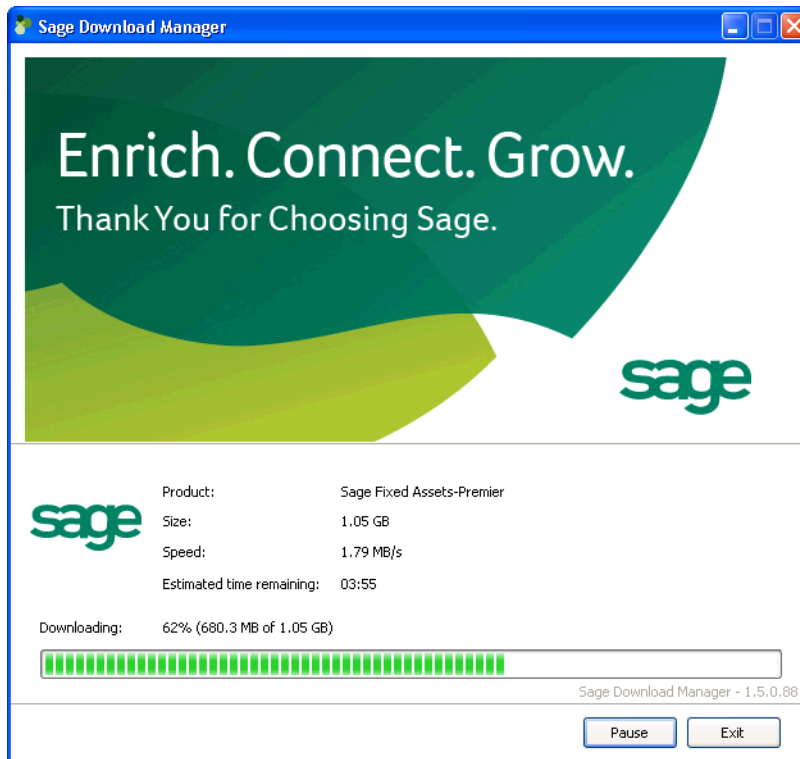
Note: You must be on the server machine to install the server components. You cannot install the server components from the client machine.

To install the Sage Fixed Assets server components

1. Log on to the Sage Knowledgebase at: <https://support.na.sage.com/>.
2. Under Browse Products on the left, click Sage Fixed Assets.
3. Enter Download 2015.2 in the text field and then click Search.
4. Find and then click the Download Sage Fixed Assets - Premier Edition hyperlink to open the product download article.
5. Click the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

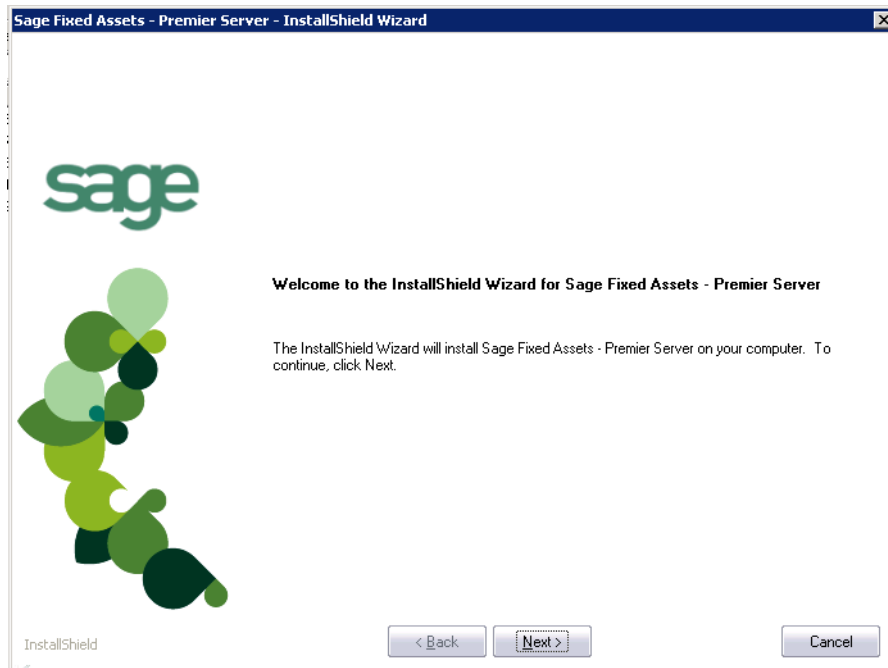


6. Click OK. The system begins to download the file.

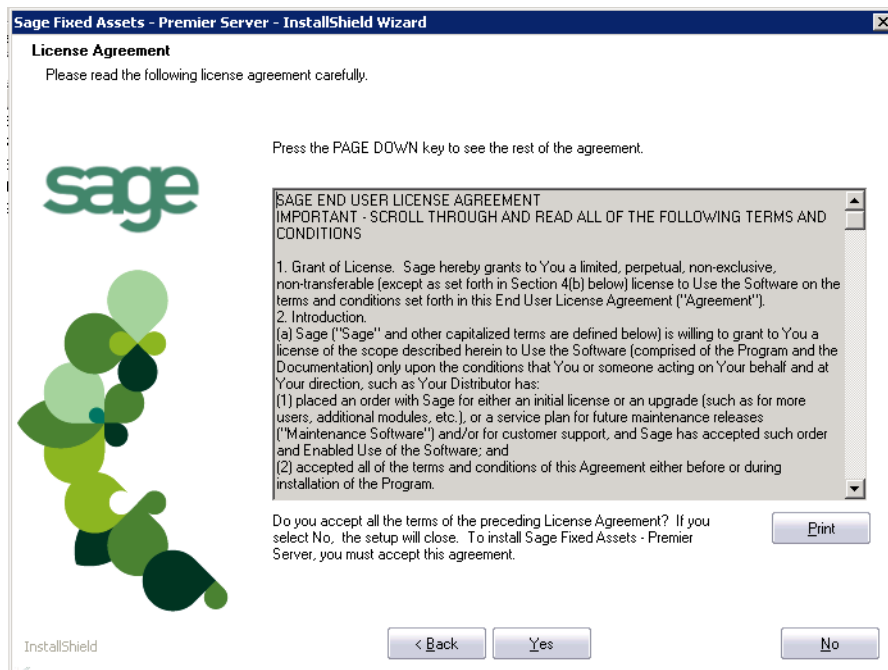


The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, Microsoft SQL Server 2008 Management Objects, and Microsoft SQL Server System CLR Types if it is not already installed.

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.

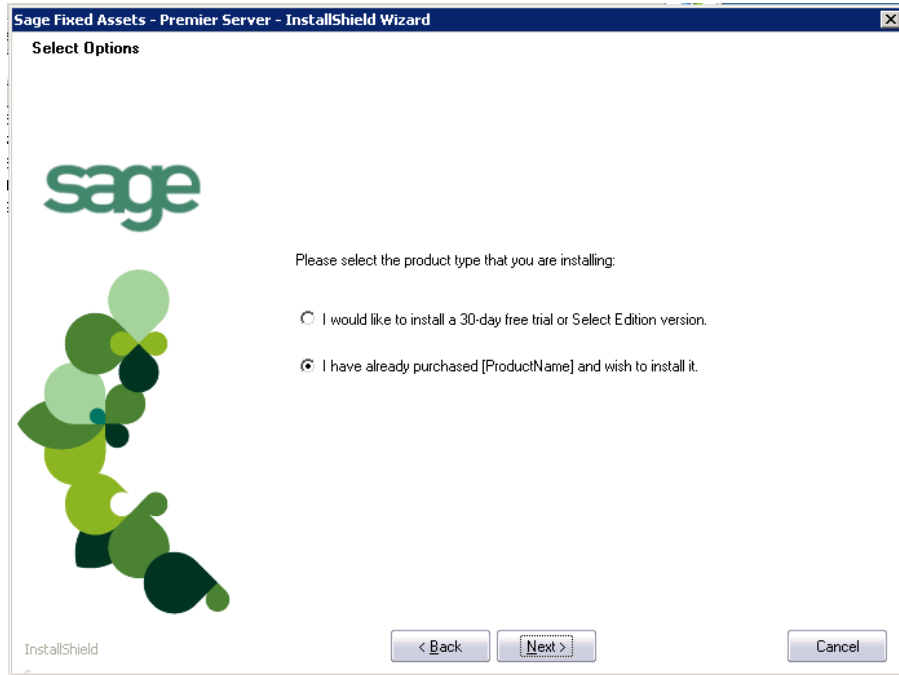


■ **Print Button**

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

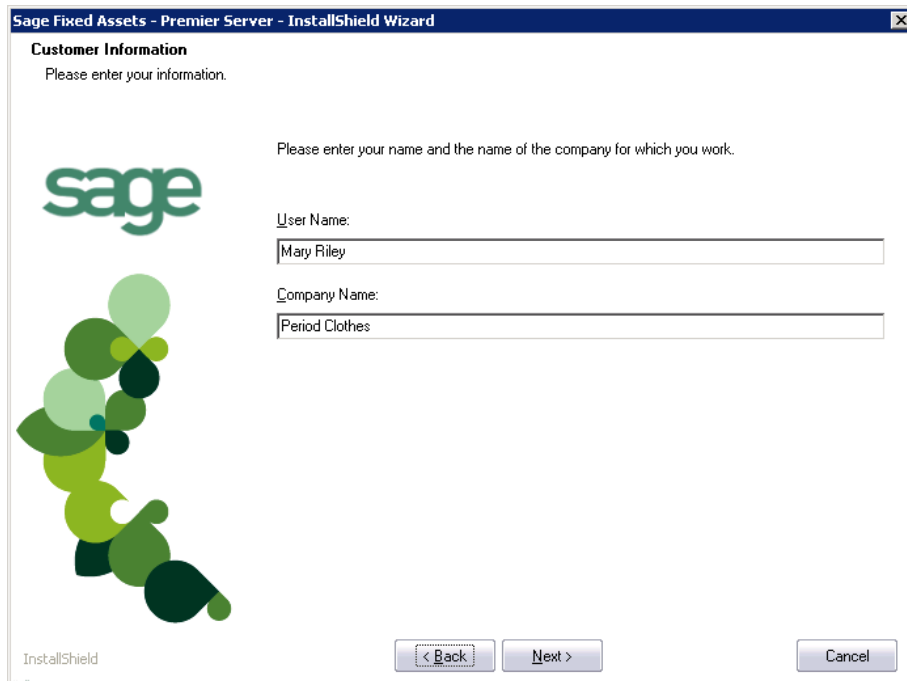
9. Read the license agreement, and then click the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, click the No button. The system exits from the installation program.)

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



10. 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.

Sage Fixed Assets - Premier Server - InstallShield Wizard

Customer Information
 Please enter your information.

Please enter your name, the name of the company for which you work and your customer number.

sage

User Name:

Company Name:

Customer Number:

If you don't know your customer number visit www.SageFixedAssets.com/customernumber or call customer service at 800-368-2405.

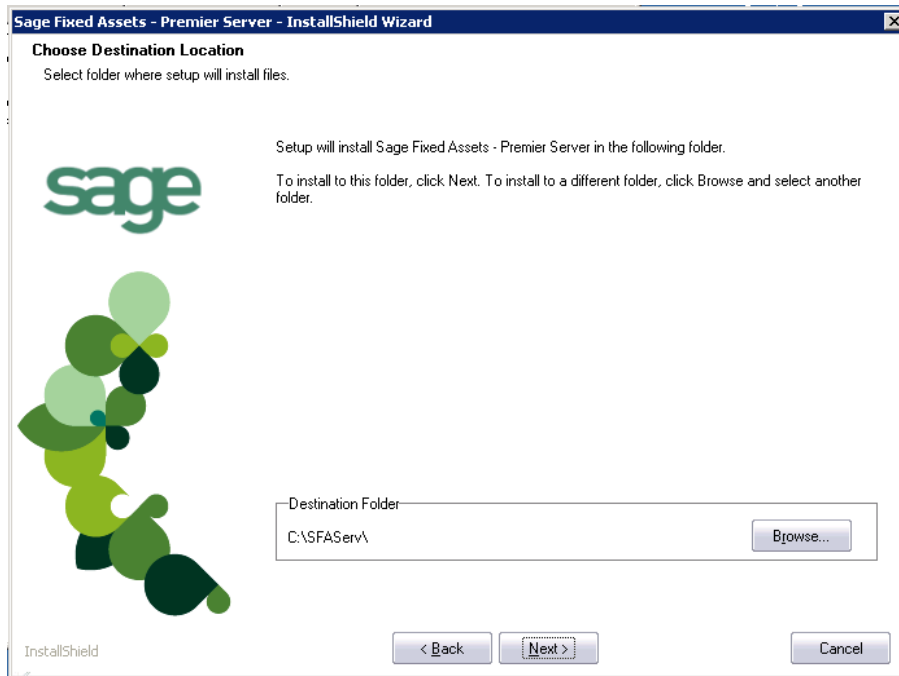
InstallShield

< Back Next > Cancel

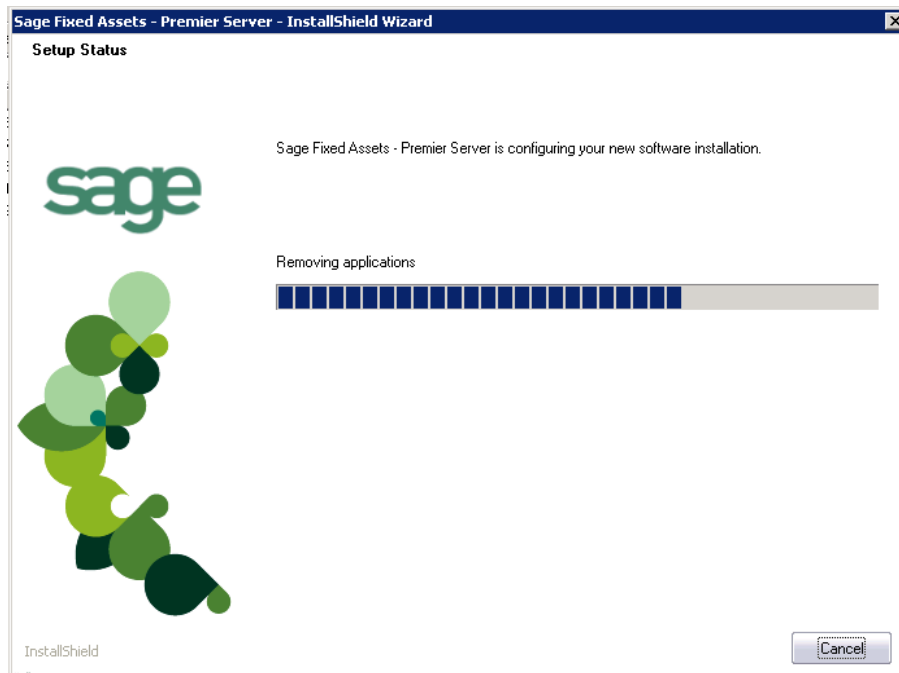
11. Enter your name, company name, and customer number if required. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

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.

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

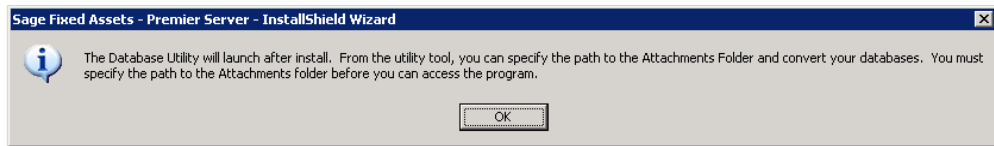


13. Select the folder in which to install the server components, and then click the Next button. The system begins installing the software, and the Setup Status dialog appears.



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

- The application will launch the Database Utility, and
- You MUST specify the attachments folder for PDF files attached to images.



14. Click OK. The InstallShield Wizard Complete dialog appears.



15. Click the Finish button.

Step 2: Creating the Configuration Database

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

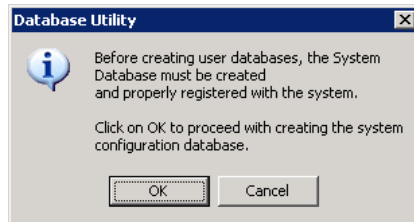
If you chose to launch the Database Utility, a message prompts you to create the Configuration Database. Otherwise, follow the steps below to launch the Database Utility.

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

To create the Configuration Database

1. Select Start/Programs (or All Programs) from the Windows taskbar.
2. Select the Sage Fixed Assets program group.

3. Select the Tools program group.
4. Select the Database Utility - Premier Depreciation & Tracking icon (or the Database Utility - Premier Planning icon). A message prompts you to create the Configuration Database.

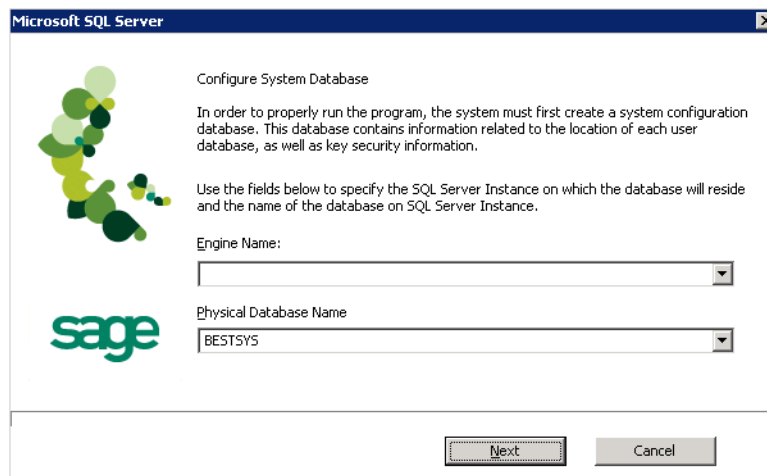


5. Click OK to proceed.

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

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

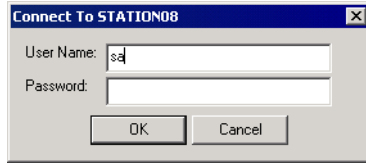
6. Select or enter the Microsoft SQL Server machine in the Engine Name field.



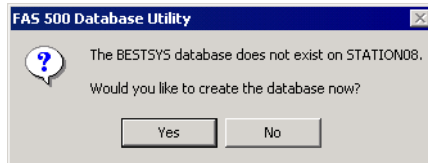
- **Engine Name**
Use this field to enter the name of the SQL Server on which the Configuration Database will reside.
- **Physical Database Name**
Use this field to change the name of the Configuration Database.

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

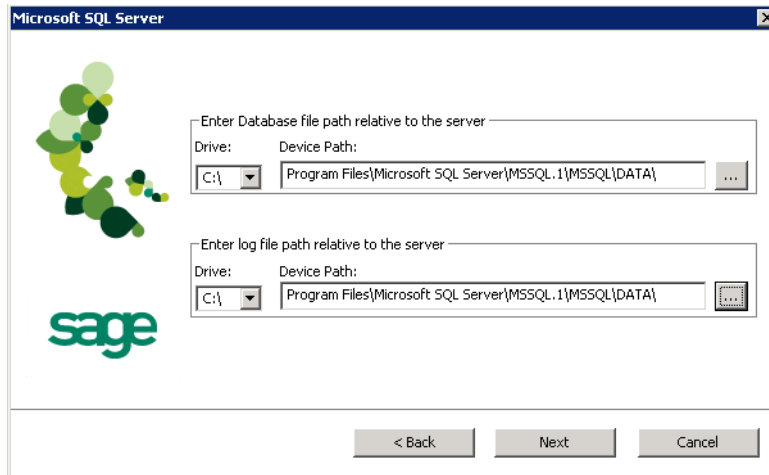
- Click the Next button. The application displays a login dialog.



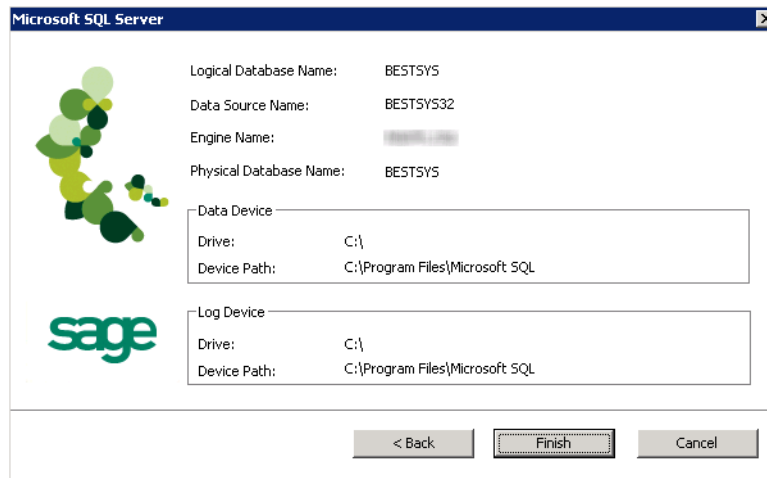
- Enter your system administrator login name and password used to log in to Microsoft SQL Server, and then click OK. The application returns to the Configure System Database dialog.
- Click the Next button. The application displays a message indicating that the Configuration Database does not exist and asking if you want to create it now.



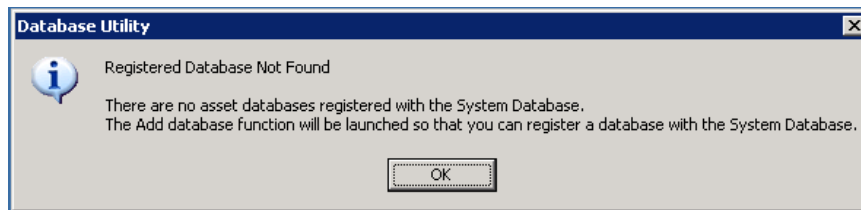
- Click the Yes button to proceed. The application displays a dialog that allows you to specify a location for the Configuration Database.



- Specify the location of the Configuration Database, and then click the Next button. The application displays a dialog that provides information about the Configuration Database.



12. Review the information, and then click the Finish button. The application displays a message indicating that you need to create a new asset database.

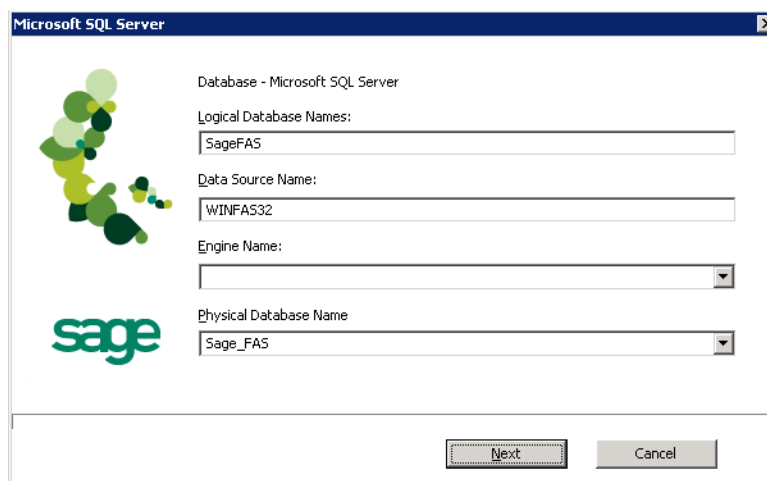


Step 3: Creating an Asset Database

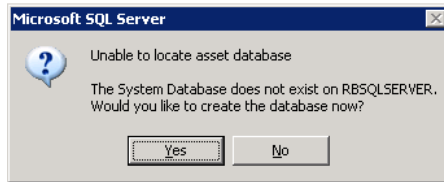
You must create at least one asset database before you install the client components and run the application.

To create an asset database

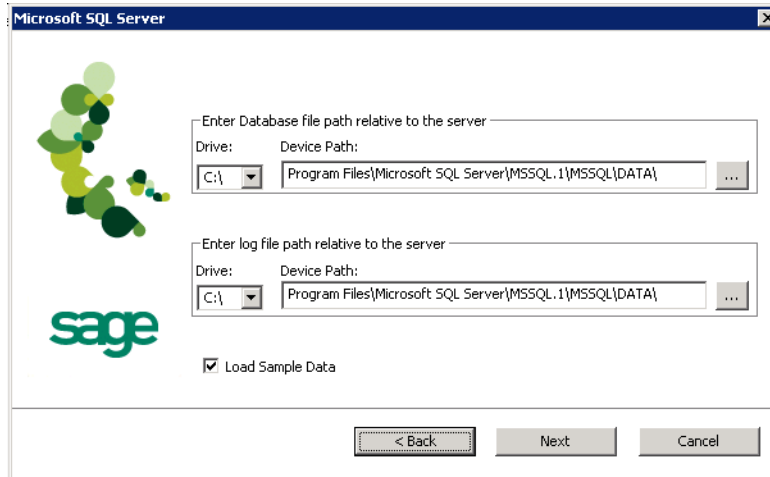
1. Click OK to proceed. The application displays a dialog that allows you to enter information about the asset database.



- **Logical Database Name**
 Use this field to enter the “user friendly” name for the new database as you want it to appear in the Database field inside the application. This name can consist of up to 50 characters. We recommend that the Logical Database Name match the Physical Database Name.
 - **Data Source Name**
 You **MUST** use the default name that the application provides.
 - **Engine Name**
 Use this field to enter the name of the computer or SQL instance on which the MS SQL Server is running.
 - **Physical Database Name**
 Use this field to enter the name of the database as you want it to appear (or as it already appears) on the MS SQL Server machine. We recommend that the Physical Database Name match the Logical Database Name.
2. Click the Next button. The application displays a message confirming that you want to create the asset database now.



3. Click the Yes button to proceed. The application displays a dialog that allows you to specify information about the asset database.



- **Enter Database File Path Relative to the Server**
 Use these fields to enter the Drive and Path of the new device. You can use the Browse button next to the Device Path field to select the path for the device.

 The name of the device depends on the physical database name entered in the previous dialog. For example, if the physical database name is Newbestdb, then the device will be named Newbestdb.mdf.
- **Enter Log File Path Relative to the Server**
 Use these fields to enter the Drive and Path of the log file for the new database. You can use the Browse button next to the Device Path field to select the path for the log file.

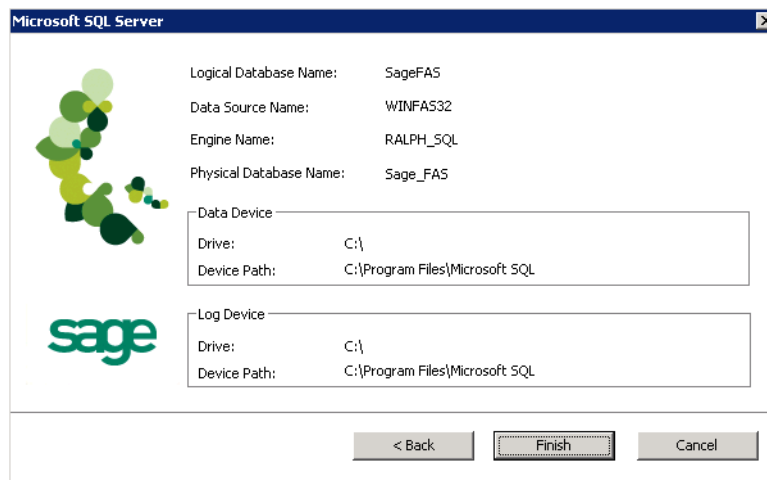
The name of the log file depends on the physical database name entered in the previous dialog. For example, if the physical database name is Newbestdb, then the log file will be named Newbestdblog.ldf.

■ **Load Sample Data (Recommended)**

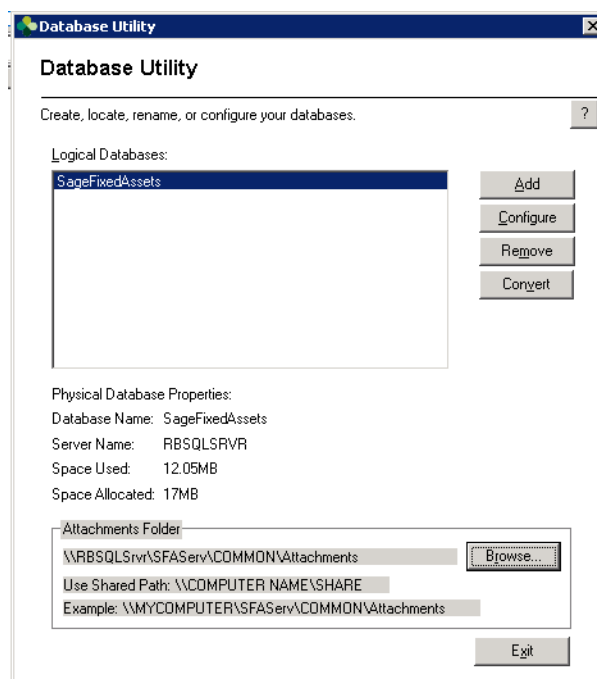
Select this check box if you want the database to contain a sample company with sample assets. We have included a sample company called Sample Company. You can use this sample data for learning about the features of the application.

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

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



5. Click the Finish button. The application displays the Database Utility dialog.



■ **Logical Databases**

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

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

■ **Physical Database Properties**

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

Database Name

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

Server Name

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

Space Used

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

Space Allocated

This is the disk space allocated for this database.

■ **Add Button**

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

■ **Configure Button**

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

■ **Remove Button**

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

■ **Convert Button**

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

■ **Attachments Folder**

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

Note: For the current release, this folder contains only Adobe PDF file attachments.

Browse Button

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

To add additional asset databases

Follow the steps below to add additional asset databases.

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

2. Select the Sage Fixed Assets program group.
3. Select the Tools program group.
4. Select the Database Utility icon. The Database Utility dialog appears.
5. Click the Add button to add a new asset database.

Step 4: Sharing the SFAServ Folder

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

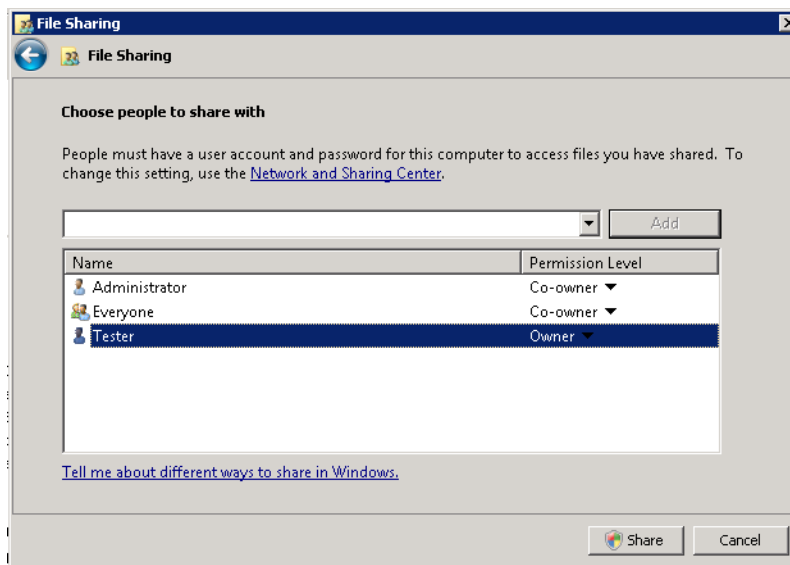
- Users of the Sage Fixed Assets application
- Domain Administrators (optional)

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

Below we show the steps for sharing a folder on Windows Server 2008.

To share the SFAServ folder

1. In Windows Explorer, right-click on the SFAServ folder.
2. From the popup menu, select Share With. The File Sharing dialog appears.



3. In the Choose People to Share With field, click the down arrow and select Administrator from the drop-down list.
4. Click the Add button. The Administrator appears in the list box.
5. In the Permission Level column, click the down arrow and change the permission level for the Administrator to “Co-owner.”
6. Repeat step 3 and select the SYSTEM group.
7. Repeat steps 4 and 5.
8. Click the Share button.

Step 5: Setting Up the Attachments Folder for PDFs

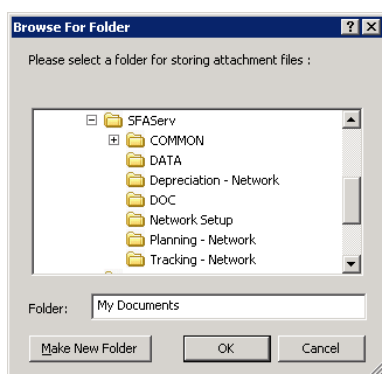
You can use the Images tab in Asset Detail to attach an image to an asset. The application stores most types of image files in the asset database. However, the application stores Adobe PDF file attachments in a separate folder.

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

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

Setting up the attachments folder

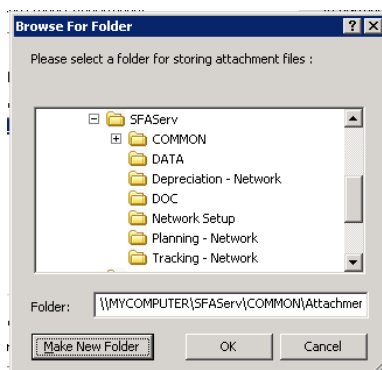
1. On the Database Utility, click the Browse button. The Browse for Folder dialog appears.



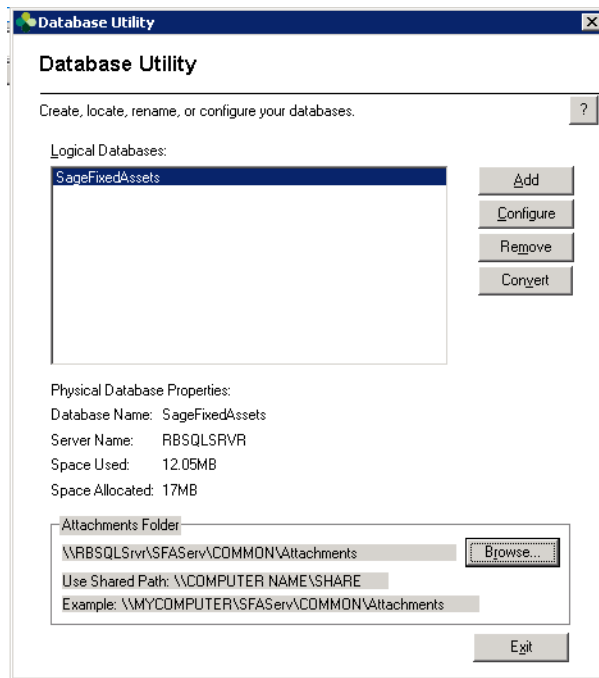
2. Select (or create) the folder that will contain the Adobe PDF file attachments. The directory path must appear in the format \\COMPUTER NAME\SHARE NAME\folder path. For example, if the computer name is "MYCOMPUTER" and the share name of the SFAServ folder is "SFAServ," then the path to the existing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

\\MYCOMPUTER\SFAServ\COMMON\Attachments.

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



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



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

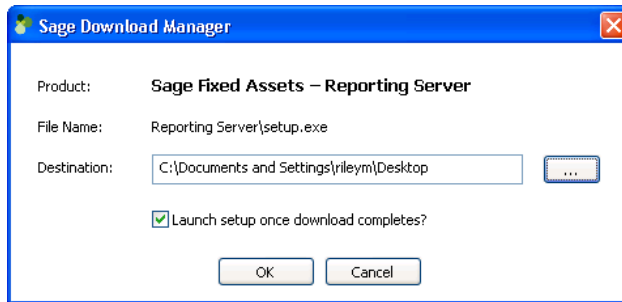
Step 6: Installing the Sage Fixed Assets—Reporting Server Components (Optional)

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

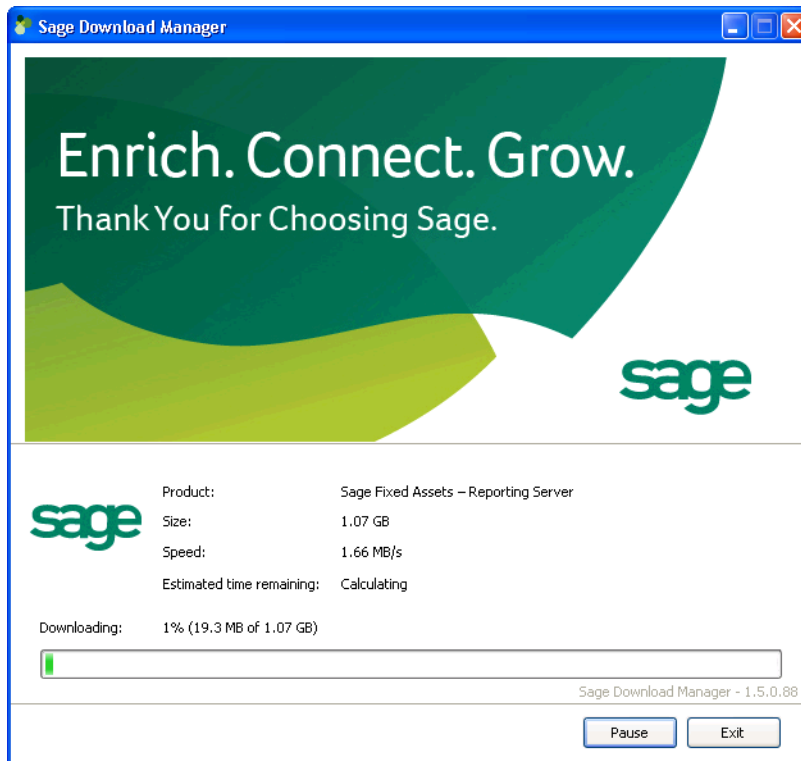
Note: The Sage Fixed Assets—Reporting program uses SAP® Crystal Reports 2011 (Crystal Reports), which requires 2 GB of hard disk space. Sage Fixed Assets—Reporting may not be compatible with other versions of Crystal Reports. Before installing Sage Fixed Assets—Reporting, we recommend that you make sure version Crystal Reports 2011 is compatible with your other applications that run Crystal Reports.

To install the Sage Fixed Assets—Reporting server components

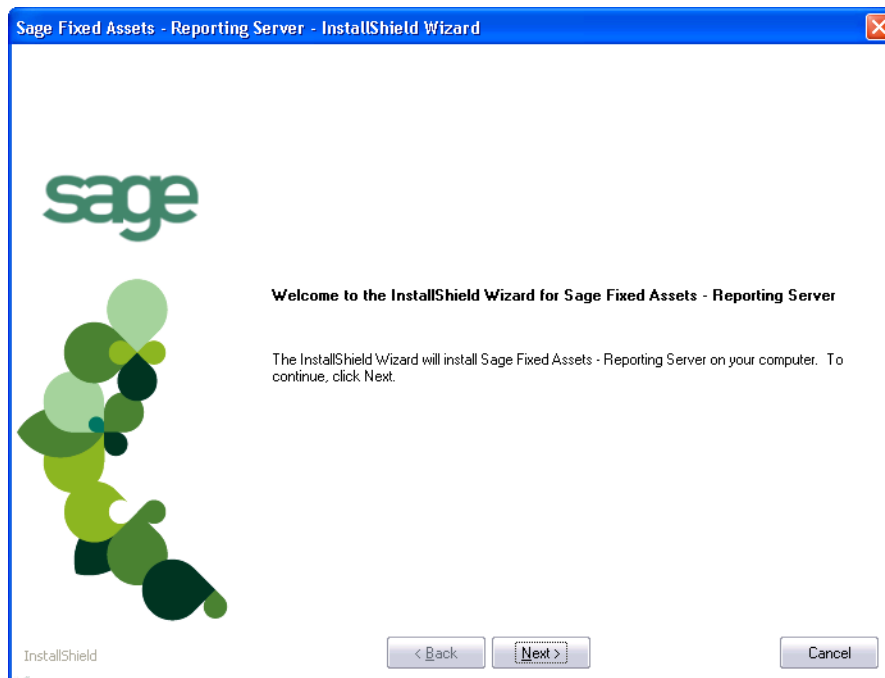
1. Point your browser to the Sage Customer Portal at:
<https://customers.sagenorthamerica.com>.
2. Click the Logon link and enter your Customer Logon information.
3. Click the Product Downloads link. The system opens a web page with downloads for system requirements, Sage Fixed Assets products, and their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



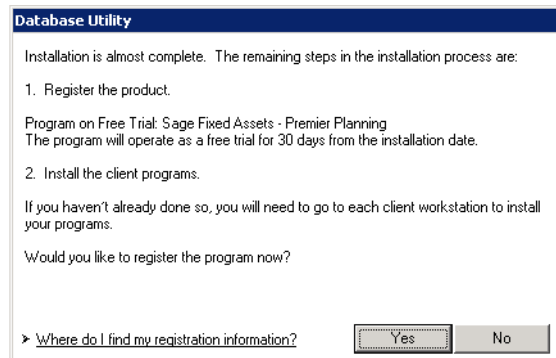
7. Click the Next button and follow the on-screen instructions.

For instructions on installing the Sage Fixed Assets—Reporting client components, see [Chapter 10](#), “Installing Sage Fixed Assets—Reporting.”

Step 7: Registering the Application

The process of registering the program 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.

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

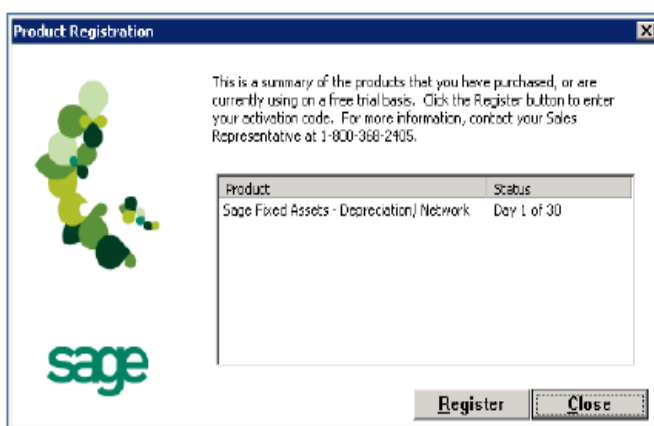


Click “Where do I find my registration information” to view a web page that explains where to find your Serial Number and Activation Code.

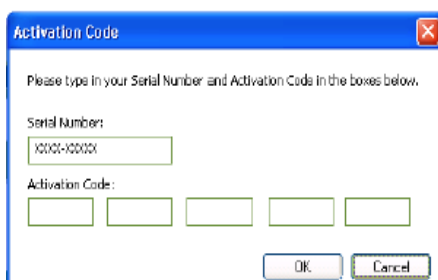
Note: You have 30 days to register the application.

To register the application

1. On the server machine, 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.
3. Select the Tools program group.
4. Select the Registration - Premier Depreciation & Tracking icon (or the Registration - Premier Planning icon). A Product Registration dialog similar to the one shown below appears.



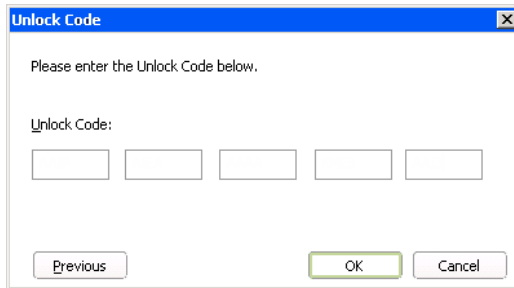
5. Click the Register button. A registration dialog appears allowing you to enter your Serial Number and Activation Code.



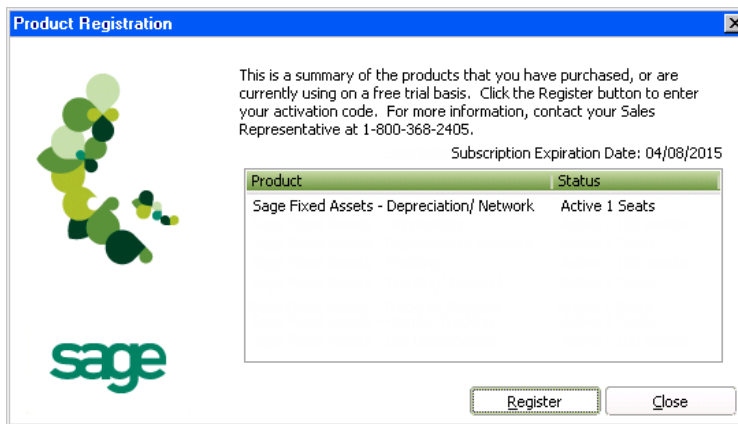
- **Serial Number**
Enter your serial number. **You must enter the hyphen.**
- **Activation Code**
Enter your activation code.

Please contact Sage Fixed Assets 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.



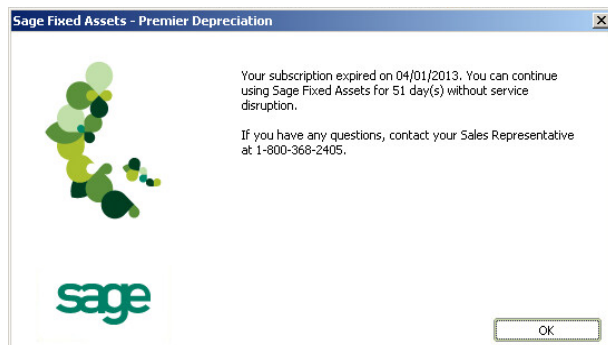
7. Click OK. The system returns to the Product Registration dialog. If you are a Subscription customer, you will see the subscription expiration date.



8. Click the Close button.

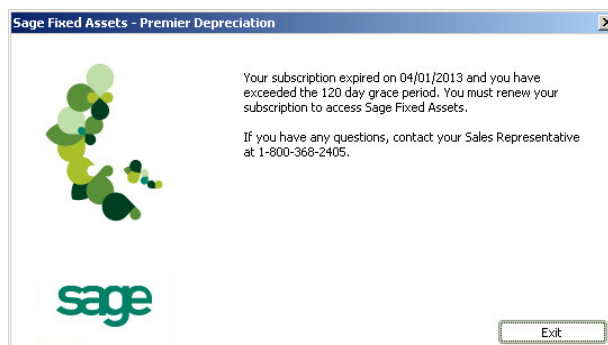
Using an Expired Subscription

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. Select **Start > All Programs > Sage Fixed Assets > Tools > Registration - Premier Depreciation & Tracking** to open the Product Registration dialog and then follow the steps in “Registering the Application,” above to register your product.



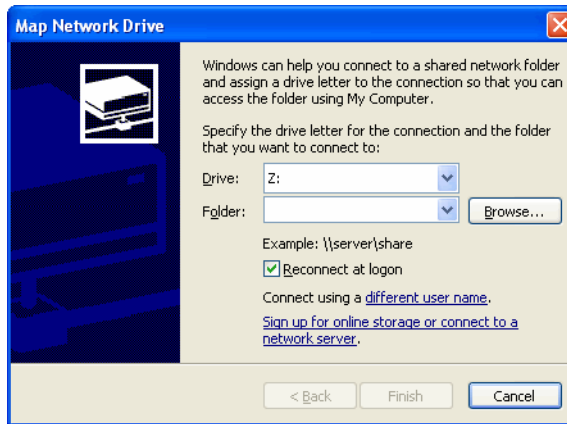
Step 8: (OPTIONAL) Mapping a Drive to the SFAServ Folder

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

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

To map a drive to the SFAServ folder

1. On each workstation, in Windows Explorer, select Tools/Map Network Drive. The Map Network Drive dialog appears.



2. Click the Browse button to locate the SFAServ folder on the server.

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

3. Click the Finish button to close the Map Network Drive dialog.

Chapter 3

Installing Sage Fixed Assets—Premier Depreciation the First Time

In this chapter:

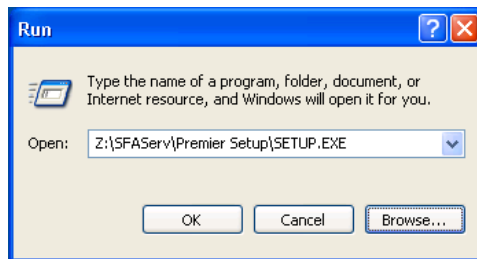
Step 1: Installing the Client Components	3-1
Step 2: Starting the Application	3-5

Step 1: Installing the Client Components

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

To install a client on a workstation

1. Do one of the following:
 - Go to My Computer, and browse to the network drive that you mapped in the previous step. Locate the folder in which you installed the server components (SFAServ is the default), and double-click the SETUP.EXE file in the Premier Setup subfolder.
 - Select Start/Run from the Windows taskbar. The Run dialog appears. In the Run dialog, enter the UNC path (\\Servername\Foldername) to the folder containing the server components.
 - In the Run dialog, enter the mapped drive path to the folder (for example, Z:\SFAServ\Premier Setup\SETUP.EXE).



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

Note: If you mapped the Z: drive to \SFAServ, then the path would be:

Z:\Premier Setup\SETUP.EXE.

2. Click OK. The Client Installation dialog appears.

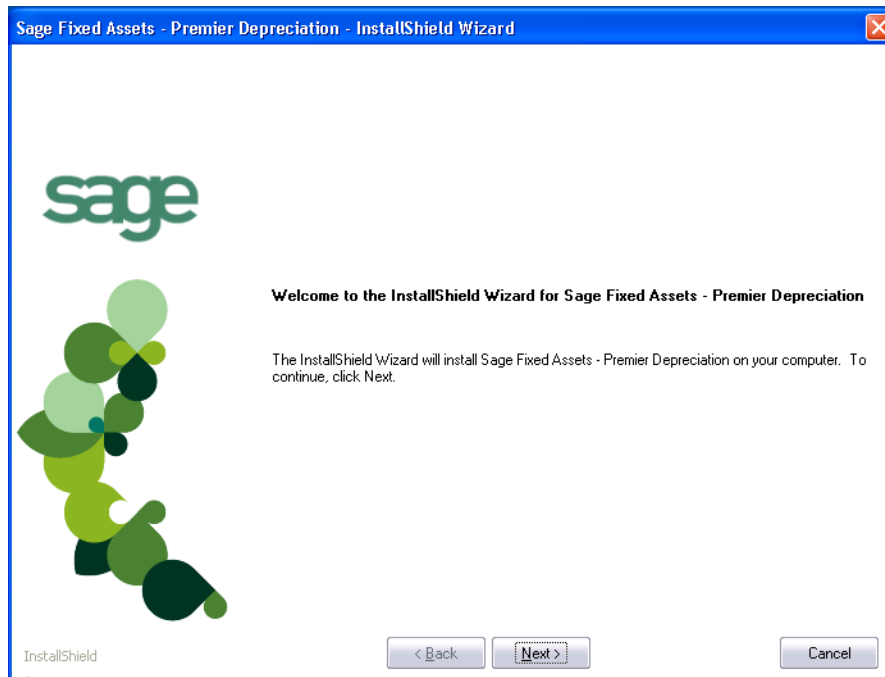


Note: The Install Sage Fixed Assets—Reporting option appears only if you have installed the Sage Fixed Assets—Reporting server.

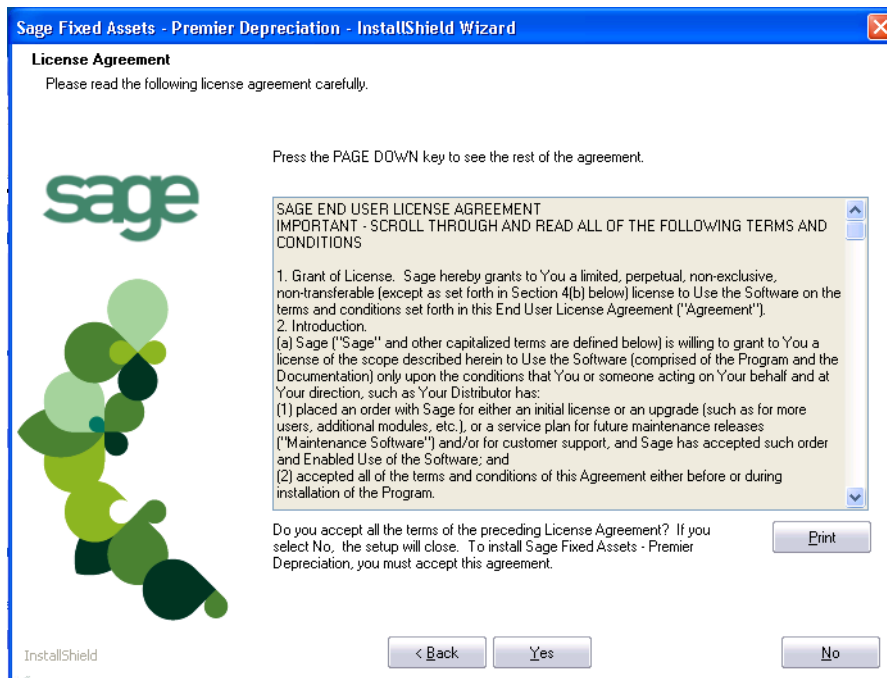
3. Select the Install Sage Fixed Assets—Premier Depreciation option.

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

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



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

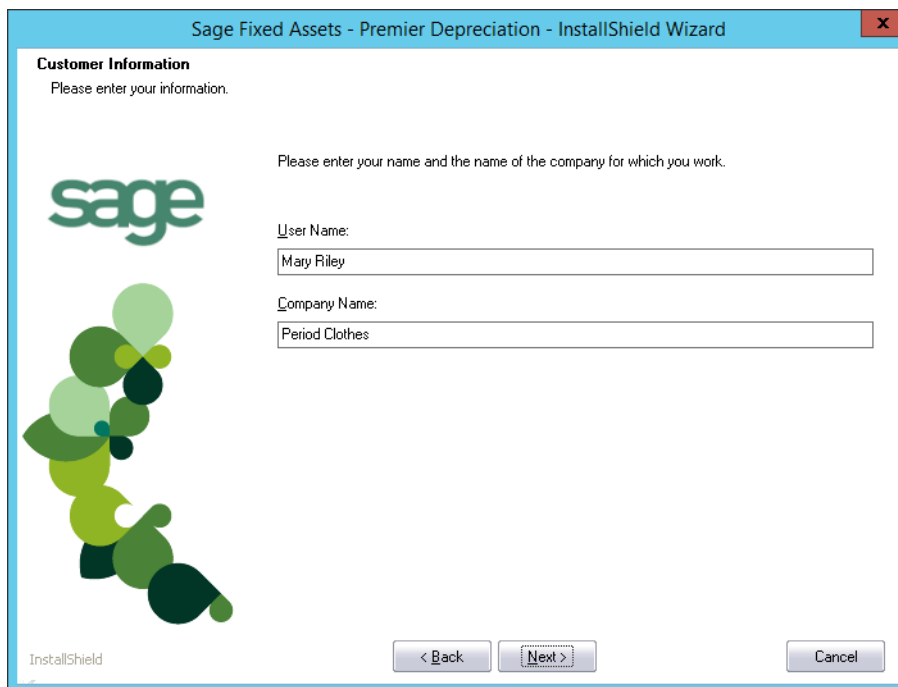


■ **Print Button**

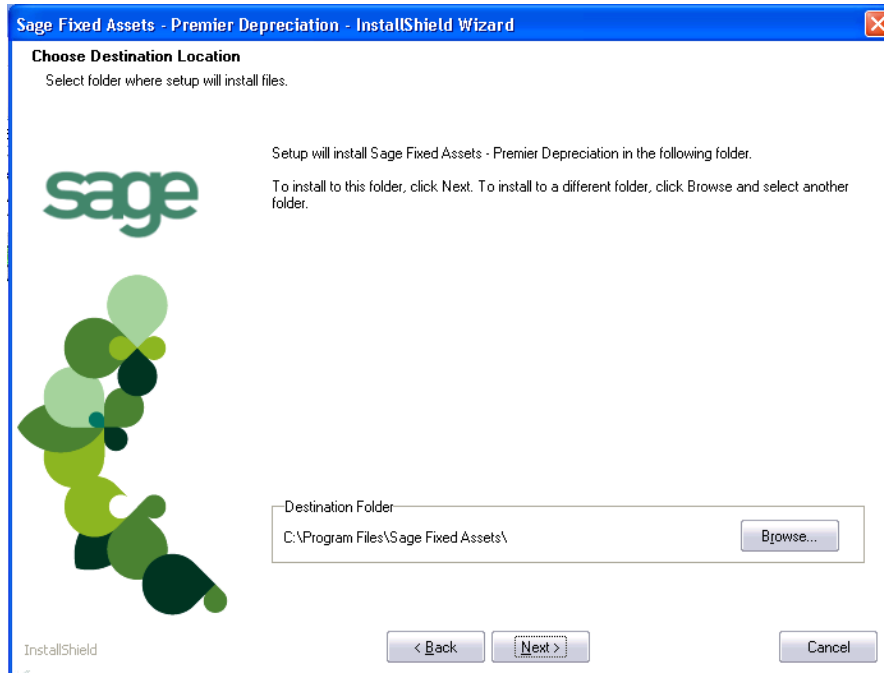
Click this button to send the license agreement to the default printer.

6. 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.)

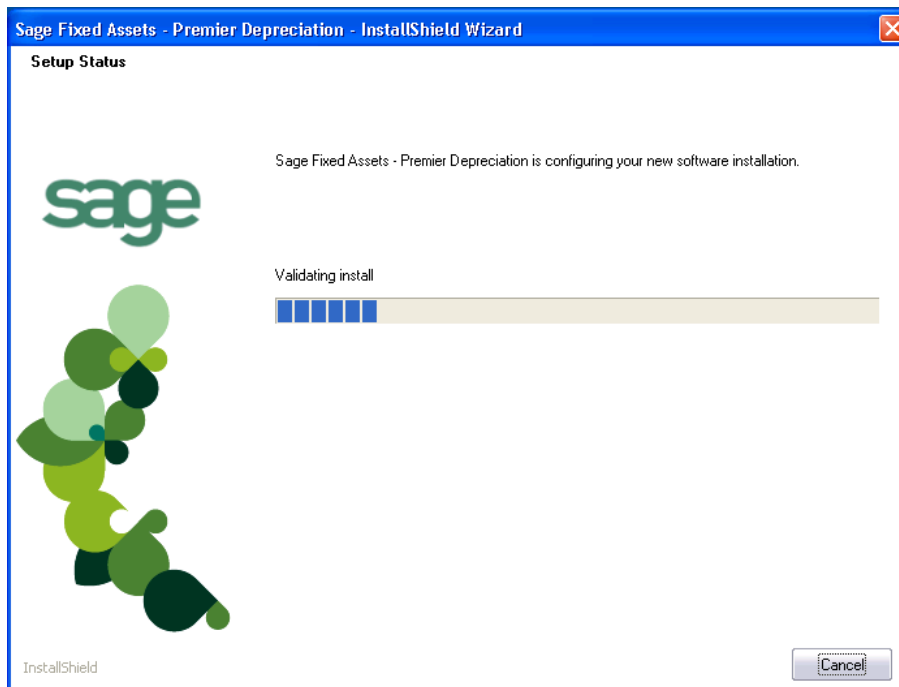
After you click the Yes button, the Customer Information dialog appears.



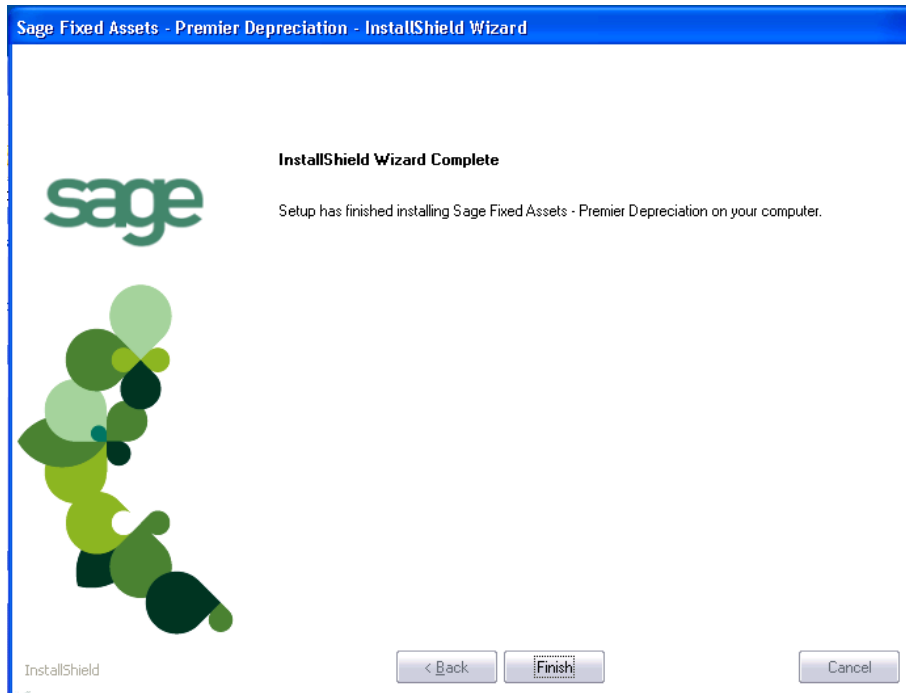
7. Enter your name and the name of the company.
8. Click the Next button. The Choose Destination Location dialog appears.



9. Select the location for the client components, and then 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.

10. Click the Finish button. The system returns to the Client Installation dialog.
11. Click Exit to close the Client Installation dialog.

Note: The Client Installation dialog will not close immediately after the installation is completed because of background processes that continue to run.

Step 2: Starting the Application

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

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

To start the application from a workstation

1. Select Start/Programs (or All Programs) from the Windows taskbar.
2. Select the Sage Fixed Assets program group.

3. Select the Premier Depreciation icon.

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.

Note: You may have already entered your customer number when you installed the client components.

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 - Premier 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:

> [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 Depreciation from the menu bar. A dialog appears that provides information about your application, including your customer number.

Chapter 4

Installing Sage Fixed Assets—Premier Tracking the First Time

In this chapter:

Step 1: Attaching Your Physical Reader	4-1
Step 2: Installing the Client Components	4-1
Step 3: Installing the Barcode Reader Program	4-6
Step 4: Starting the Application	4-9

Step 1: Attaching Your Physical Reader

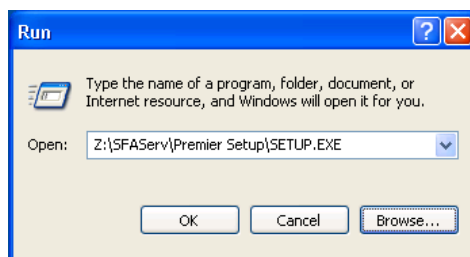
In this step, you attach your physical reader to your workstation. The installation program will detect your reader and prompt you to install the Barcode Reader program. For more information, see “[Step 3: Installing the Barcode Reader Program](#),” page 4-6.

Step 2: Installing the Client Components

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

To install a client on a workstation

1. Do one of the following:
 - Go to My Computer, and browse to the network drive that you mapped in the previous step. Locate the folder in which you installed the server components (SFAServ is the default), and double-click the SETUP.EXE file in the Premier Setup subfolder.
 - Select Start/Run from the Windows taskbar. The Run dialog appears. In the Run dialog, enter the UNC path (\\Servername\Foldername) to the folder containing the server components.
 - In the Run dialog, enter the mapped drive path to the folder (for example, Z:\SFAServ\Premier Setup\SETUP.EXE).



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

Note: If you mapped the Z: drive to \SFAServ, then the path would be:

Z:\Premier Setup\SETUP.EXE.

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

2. Click OK. The Client Installation dialog appears.

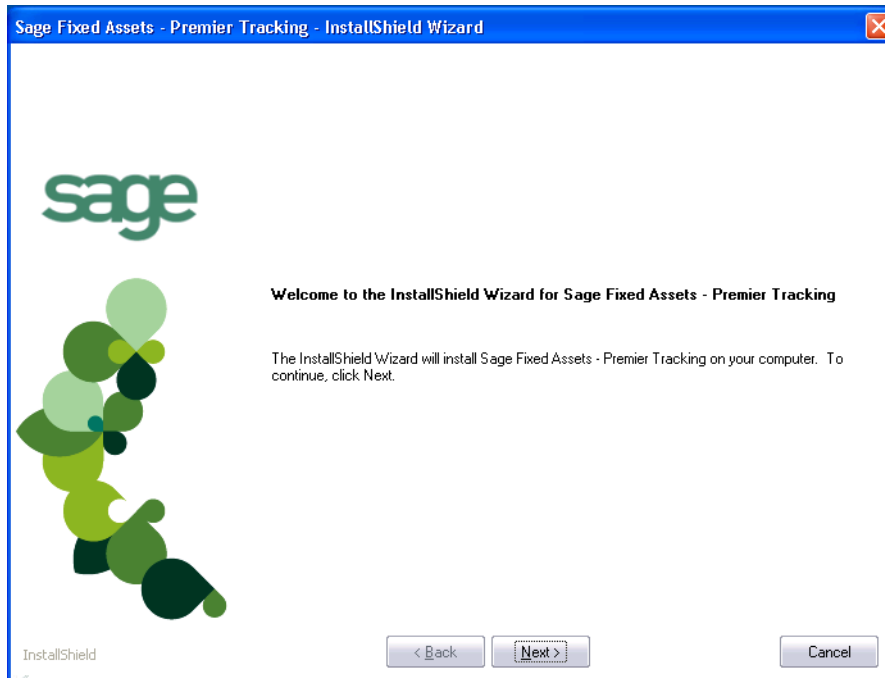


Note: The Install Sage Fixed Assets—Reporting option appears only if you have installed the Sage Fixed Assets—Reporting server.

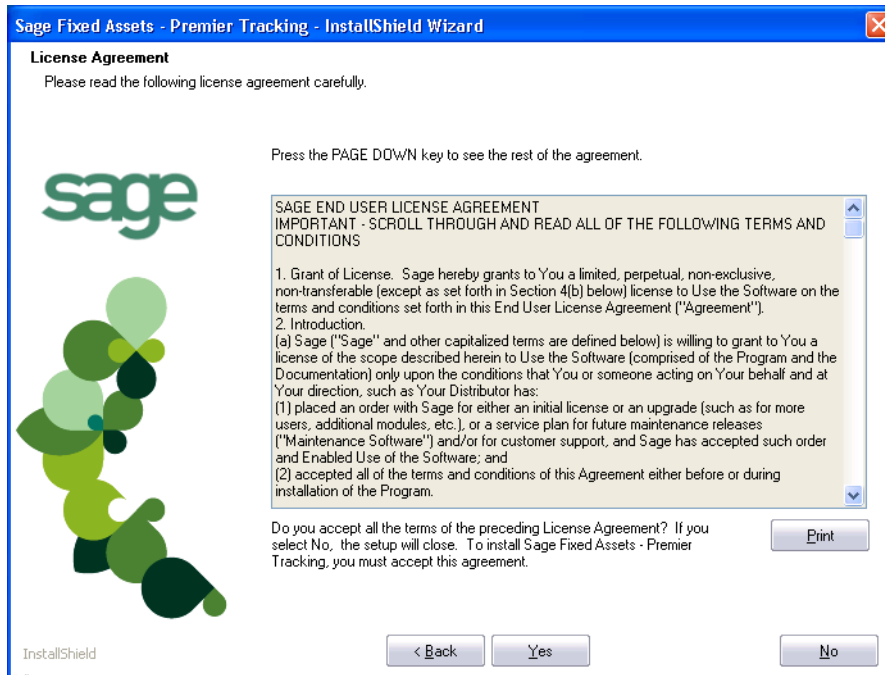
3. Select the Install Sage Fixed Assets - Premier Tracking option.

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

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



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

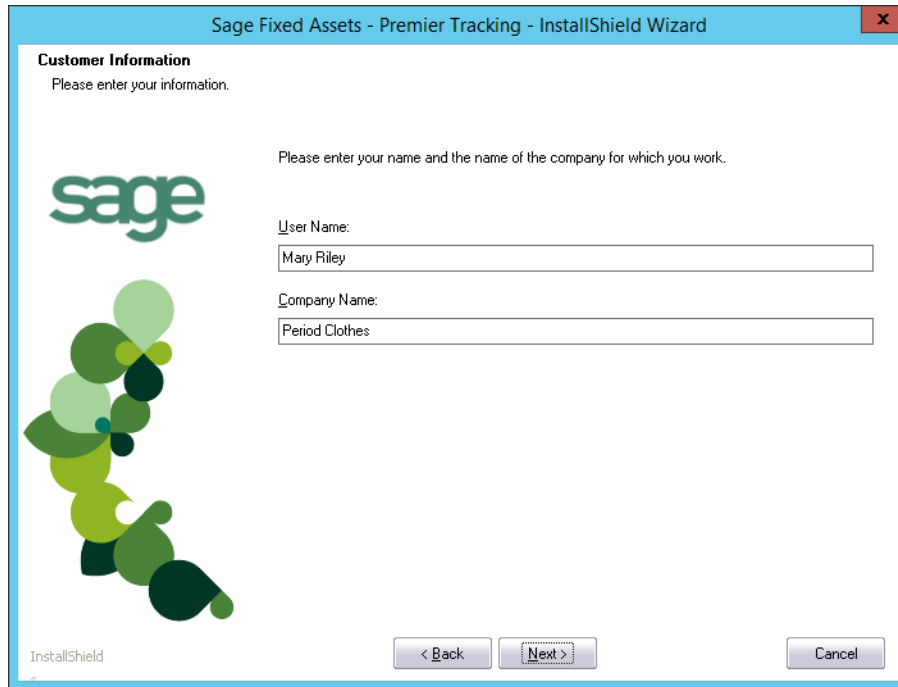


■ **Print Button**

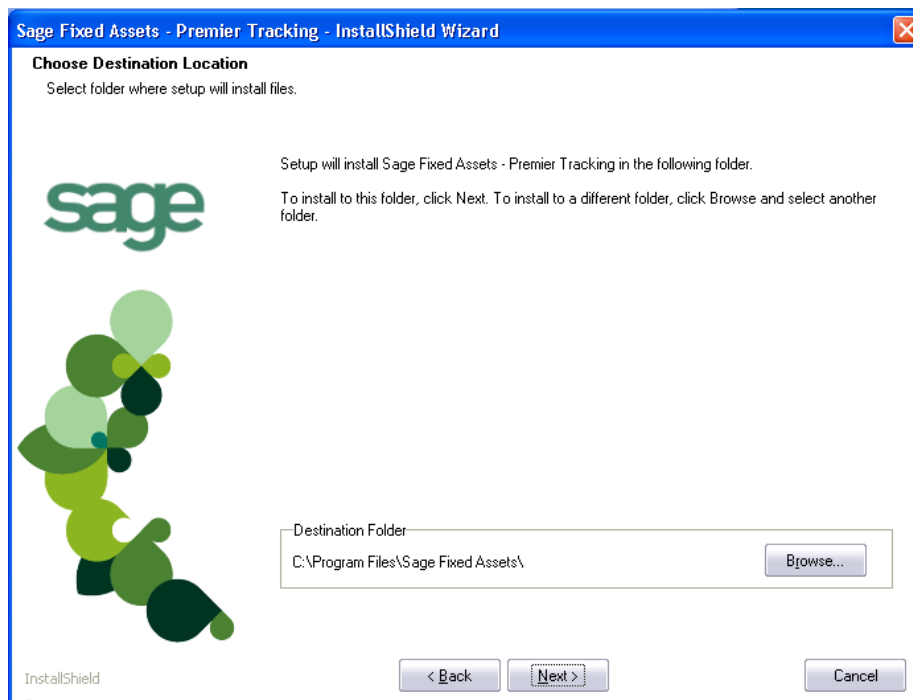
Click this button to send the license agreement to the default printer.

6. 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.)

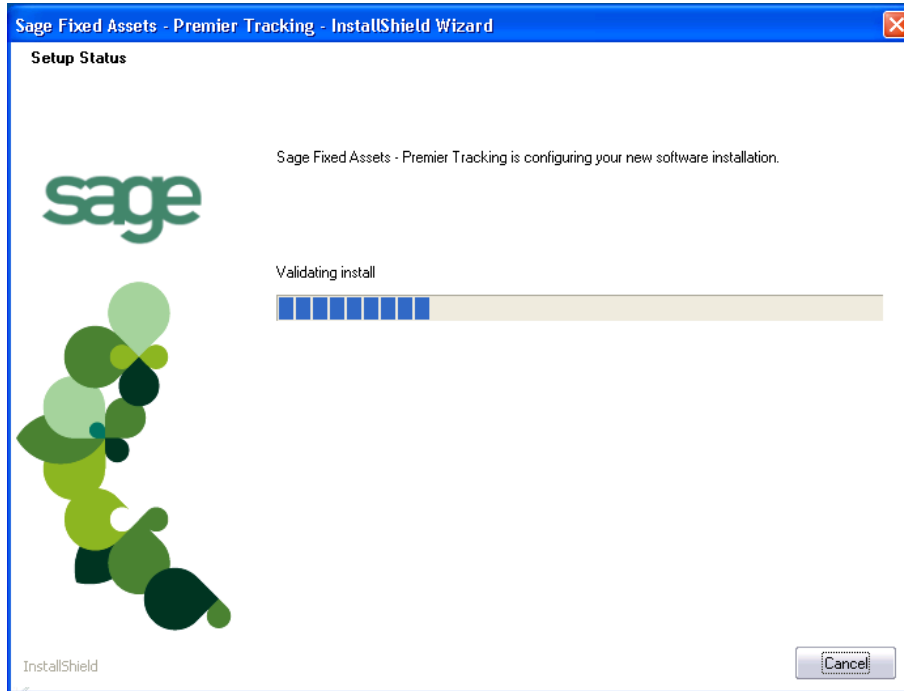
After you click the Yes button, the Customer Information dialog appears.



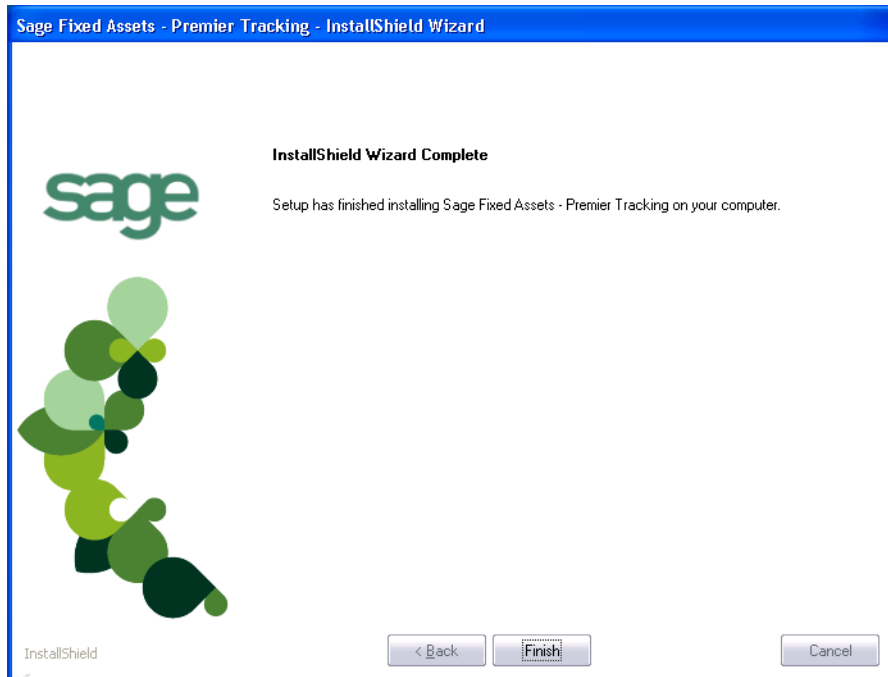
7. Enter your name and the name of the company.
8. Click the Next button. The Choose Destination Location dialog appears.



9. Select the location for the client components, and then 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.

10. Click the Finish button. The system returns to the Client Installation dialog.
11. Click Exit to close the Client Installation dialog.

Note: The Client Installation dialog will not close immediately after the installation is completed because of background processes that continue to run.

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—Premier Tracking. You can install the Barcode Reader program at any time after you have installed the application by doing the following:

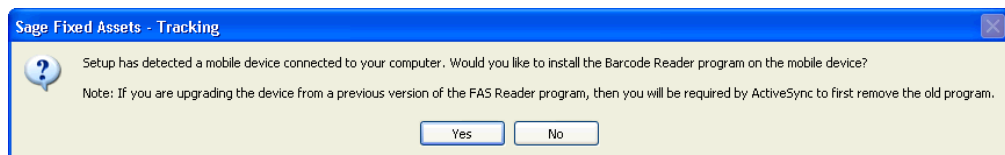
- Attach the physical reader to your computer.
- Double-click the SETUP.EXE file located in the Reader folder where you installed Sage Fixed Assets—Premier Tracking. The default location is C:\Program Files\Sage Fixed Assets\Reader.

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

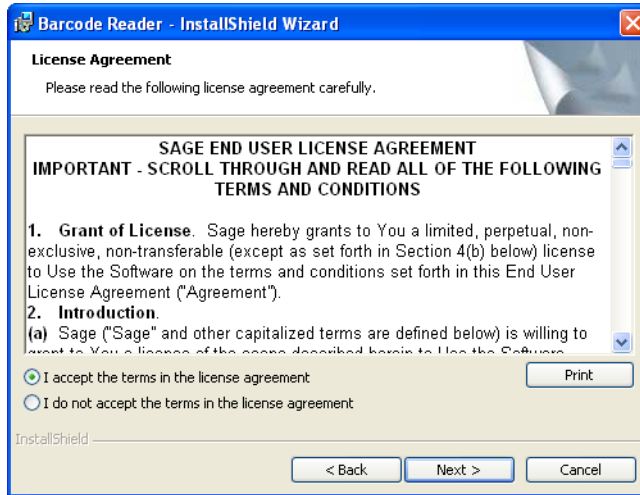
1. Before starting the Sage Fixed Assets—Premier Tracking installation, make sure your physical reader is connected to your computer and has at least 3 MB of storage memory available.

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



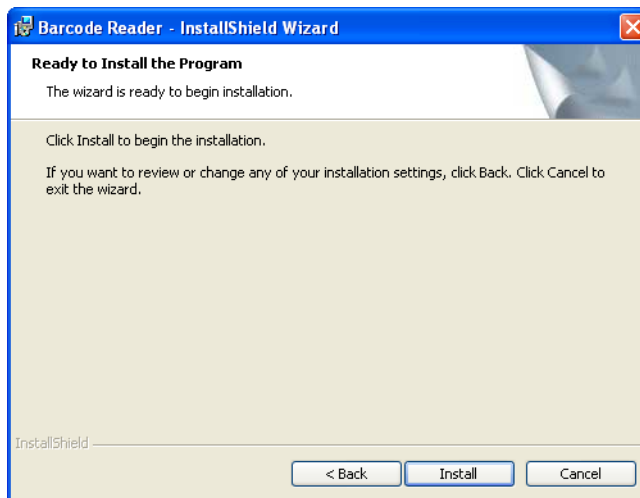
2. Click Yes. The Welcome dialog appears.

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



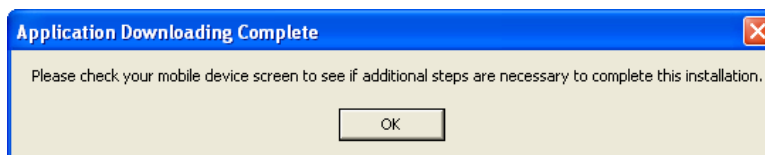
4. Read the license agreement, accept the terms of the license agreement, and then click the Next button. (If you do not accept the terms of the license agreement, click the Cancel button and the system exits from the installation program.)

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.

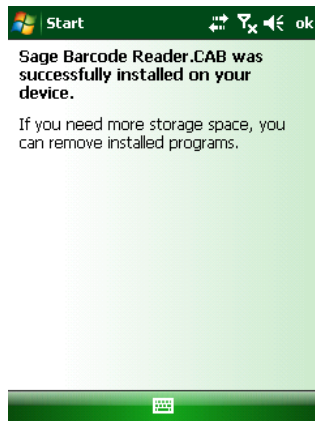
When the installation is complete, a message asks you to check your physical device screen for additional steps to complete the installation.



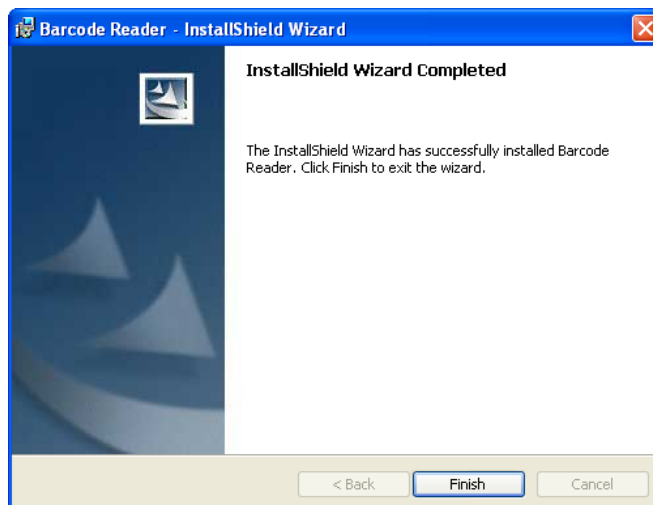
6. Click OK. On the physical device, a message allows you to select the location for installing the Barcode Reader program.



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: Starting the Application

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

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

To start the application from a workstation

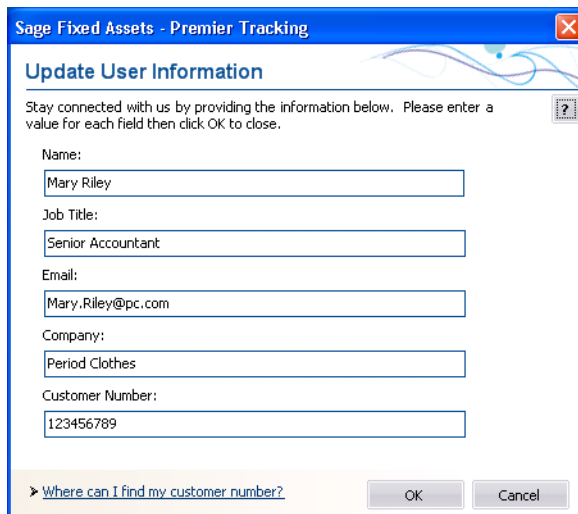
1. Select Start/Programs (or All Programs) from the Windows taskbar.
2. Select the Sage Fixed Assets program group.
3. Select the Premier Tracking icon.

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.

Note: You may have already entered your customer number when you installed the client components.

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 - Premier Tracking" 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 Tracking from the menu bar. A dialog appears that provides information about your program, including your customer number.

Chapter 5

Installing Sage Fixed Assets—Premier Planning the First Time

In this chapter:

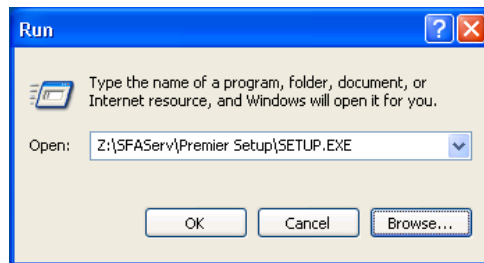
Step 1: Installing the Client Components	5-1
Step 2: Starting the Application	5-5

Step 1: Installing the Client Components

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

To install a client on a workstation

1. Do one of the following:
 - Go to My Computer, and browse to the network drive that you mapped in the previous step. Locate the folder in which you installed the server components (SFAServ is the default), and double-click the SETUP.EXE file in the Premier Setup subfolder.
 - Select Start/Run from the Windows taskbar. The Run dialog appears. In the Run dialog, enter the UNC path (\\Servername\Foldername) to the folder containing the server components.
 - In the Run dialog, enter the mapped drive path to the folder (for example, Z:\SFAServ\Premier Setup\SETUP.EXE).



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

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

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

2. Click OK. The Client Installation dialog appears.

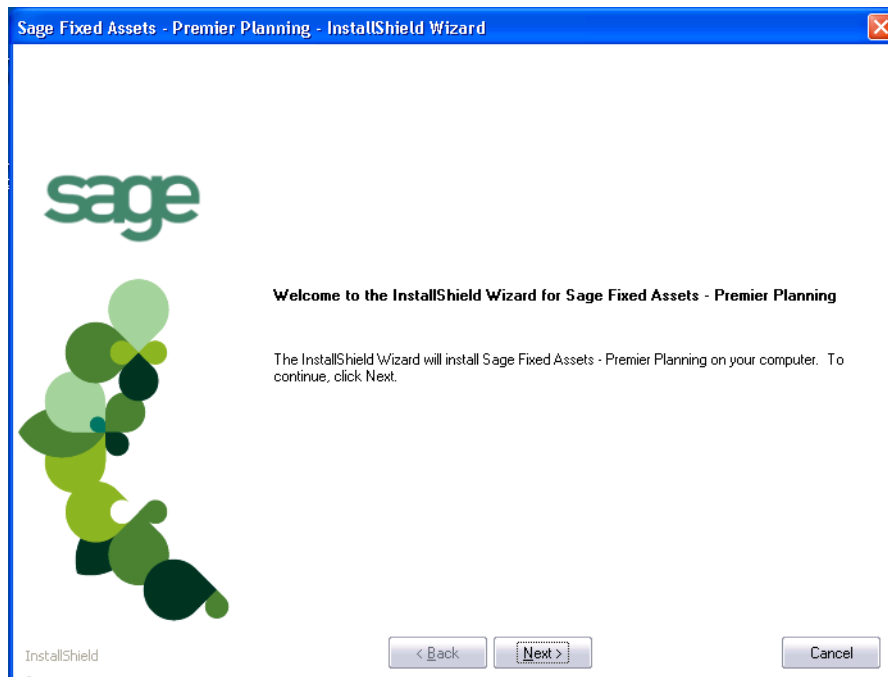


Note: The Install Sage Fixed Assets—Reporting option appears only if you have installed the Sage Fixed Assets—Reporting server.

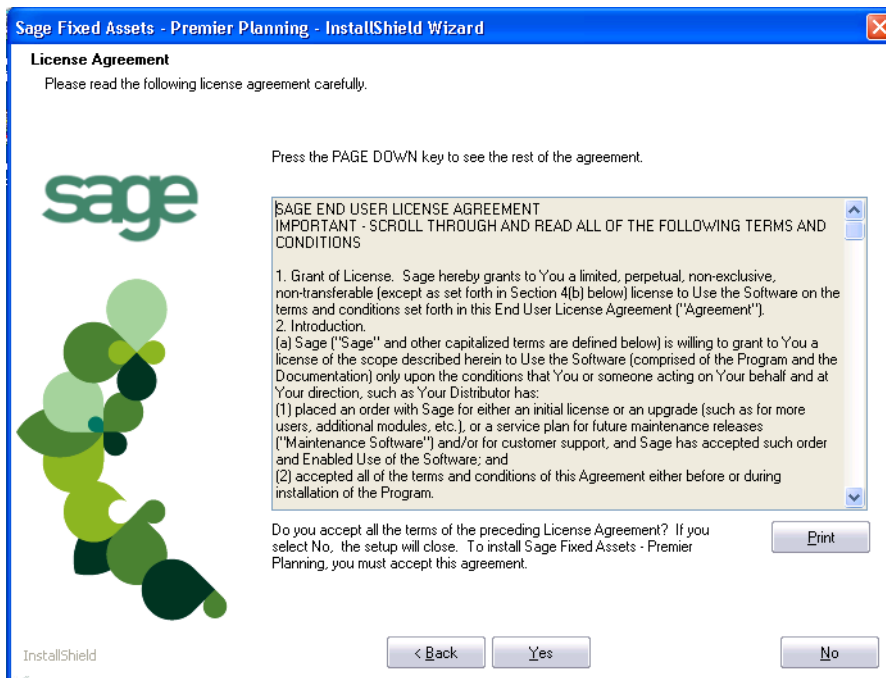
3. Select the Install Sage Fixed Assets—Premier Planning option.

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

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



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

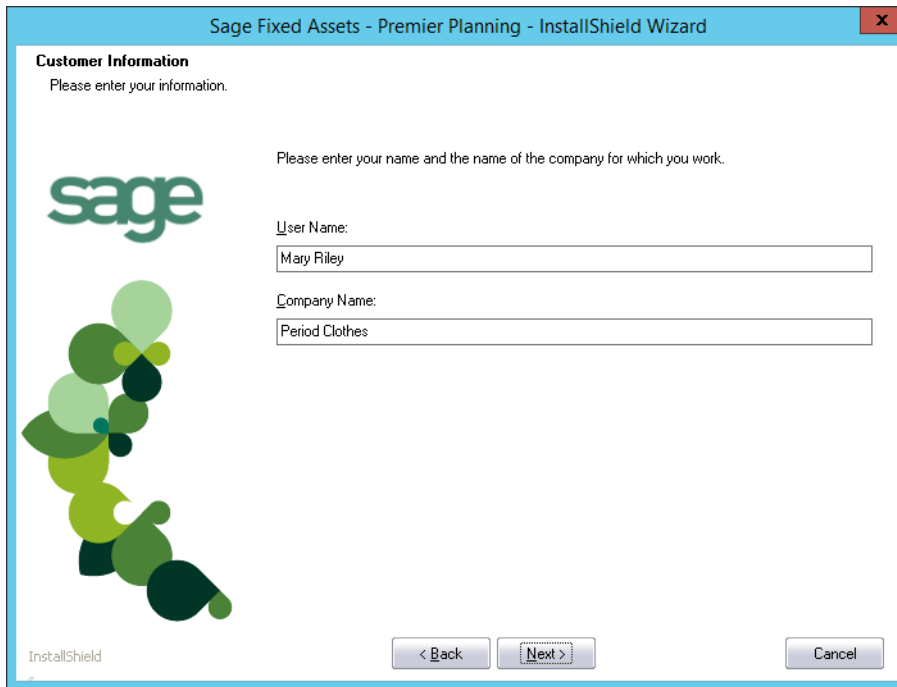


■ **Print Button**

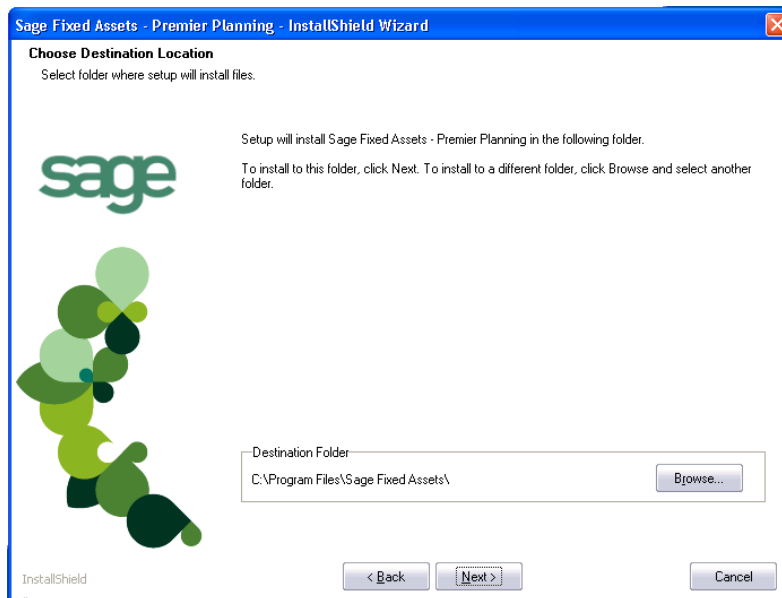
Click this button to send the license agreement to the default printer.

6. 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.)

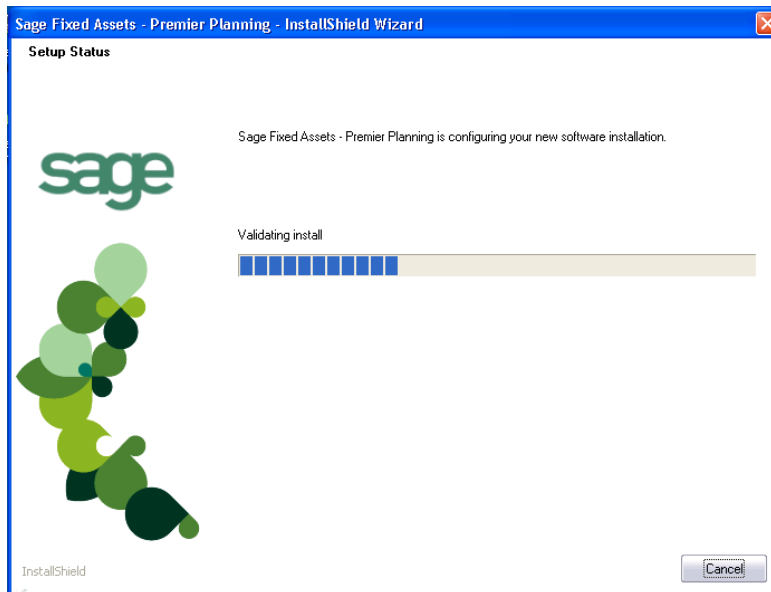
After you click the Yes button, the Customer Information dialog appears.



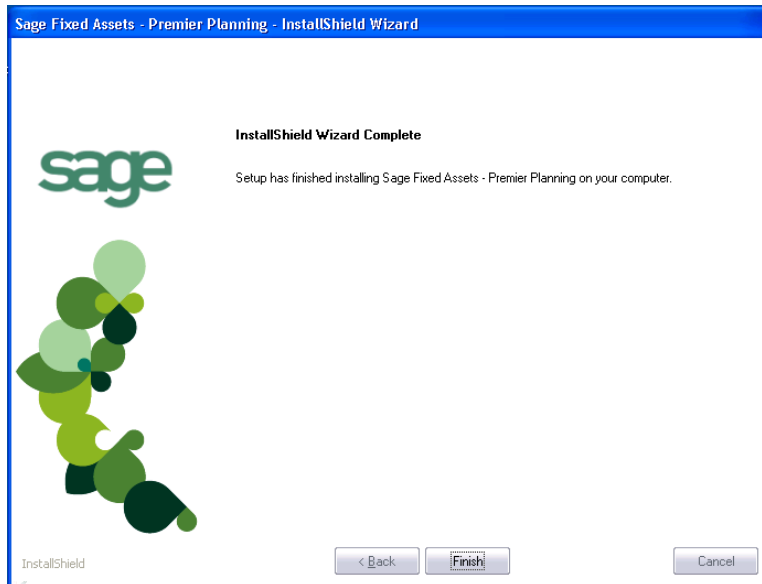
7. Enter your name and the name of the company.
8. Click the Next button. The Choose Destination Location dialog appears.



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



When all of the files have been installed, 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.

10. Click the Finish button. The system returns to the Client Installation dialog.
11. Click Exit to close the Client Installation dialog.

Note: The Client Installation dialog will not close immediately after the installation is completed because of background processes that continue to run.

Step 2: Starting the Application

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

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

To start the application from a workstation

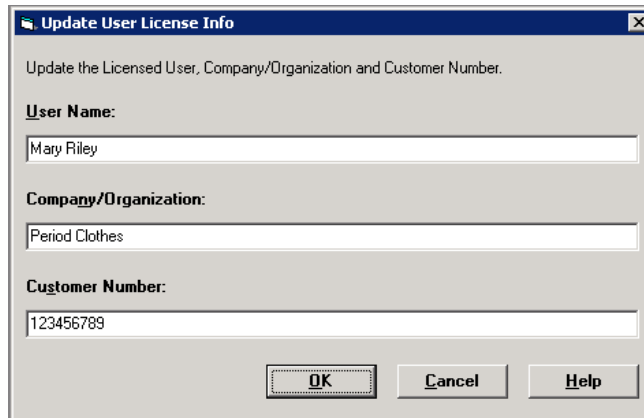
1. Select Start/Programs from the Windows taskbar.
2. Select the Sage Fixed Assets program group.
3. Select the Premier Planning icon.

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.

Note: You may have already entered your customer number when you installed the client components.

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:

- Title bar: Update User License Info [Close]
- Instruction: Update the Licensed User, Company/Organization and Customer Number.
- User Name: Mary Riley
- Company/Organization: Period Clothes
- Customer Number: 123456789
- Buttons: 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 6

Installing Sage Fixed Assets - Premier Server: Upgrading from a Prior Version

In this chapter:

Previous Versions Compatible with the Latest Version	6-1
Preparing for an Upgrade	6-1
Overview of the Upgrade Process	6-1
Step 1: Backing Up Your Current Data	6-2
Step 2: Upgrading the Sage Fixed Assets Server Components	6-3
Step 3: Setting Up the Attachments Folder for PDFs	6-9
Step 4: Installing the Sage Fixed Assets—Reporting Server Components (Optional)	6-11
Step 5: Converting Your Current Data	6-13

Previous Versions Compatible with the Latest Version

You must be currently using Sage Fixed Assets v2015.1 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.

Preparing for an Upgrade

- Have you backed up your existing data using the application’s backup utility? (To back up your data, select File/Company Utilities/Backup Company from the menu bar.)

Location of backup _____

Overview of the Upgrade Process

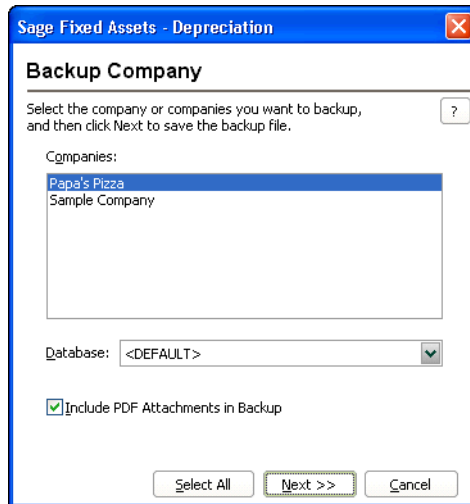
The upgrade process consists of the following steps:

1. Backing up your current data, [page 6-2](#).
2. Upgrading the Sage Fixed Assets server components, [page 6-3](#).
3. Setting up the attachments folder for PDFs, [page 6-9](#).
4. **Optional:** Installing the Sage Fixed Assets—Reporting server, [page 6-11](#).
5. Converting your current data, [page 6-13](#).

Step 1: Backing Up Your Current Data

To back up your data

1. Start the Sage Fixed Assets client application.
2. Select File/Company Utilities/Backup Company from the menu bar. The system displays the Backup Company dialog.



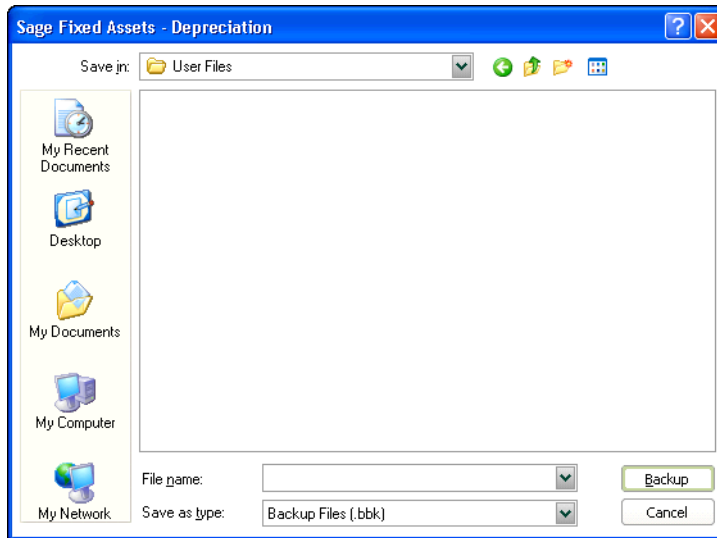
3. Select the database containing the company or companies you want to back up.

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

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

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

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



6. Enter a file name and select a location for the backup file, and then click the Backup button. The application saves the backup file and returns to the Backup Company dialog.
7. After the backup is complete, click the Cancel button to close the Backup Company dialog, or select another company to back up.

Step 2: Upgrading the Sage Fixed Assets Server Components

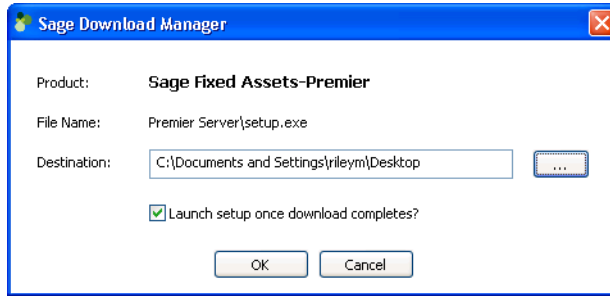
In this step, you upgrade the server components on the server machine for the following applications:

- Sage Fixed Assets—Premier Depreciation
- Sage Fixed Assets—Premier Tracking
- Sage Fixed Assets—Premier Planning

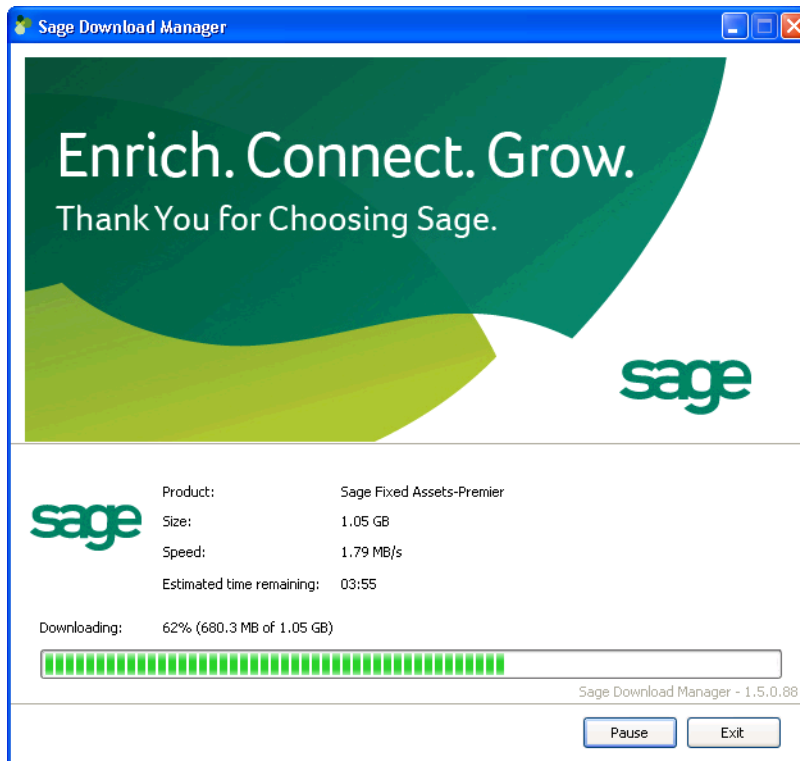
Note: You must be on the server machine where the previous server components were installed to upgrade the server components. You cannot install the server components from the client machine.

To upgrade the Sage Fixed Assets server components

1. Log on to the Sage Knowledgebase at: <https://support.na.sage.com/>.
2. Under Browse Products on the left, click Sage Fixed Assets.
3. Enter Download 2015.1 in the text field and then click Search.
4. Find and then click the Download Sage Fixed Assets - Premier Edition hyperlink to open the product download article.
5. Click the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

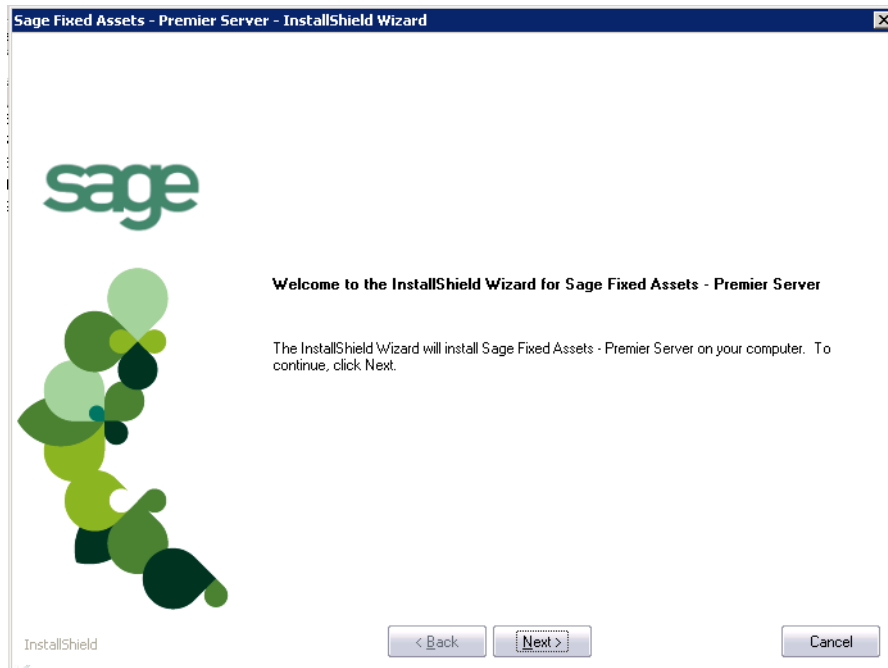


6. Click OK. The system begins to download the file.

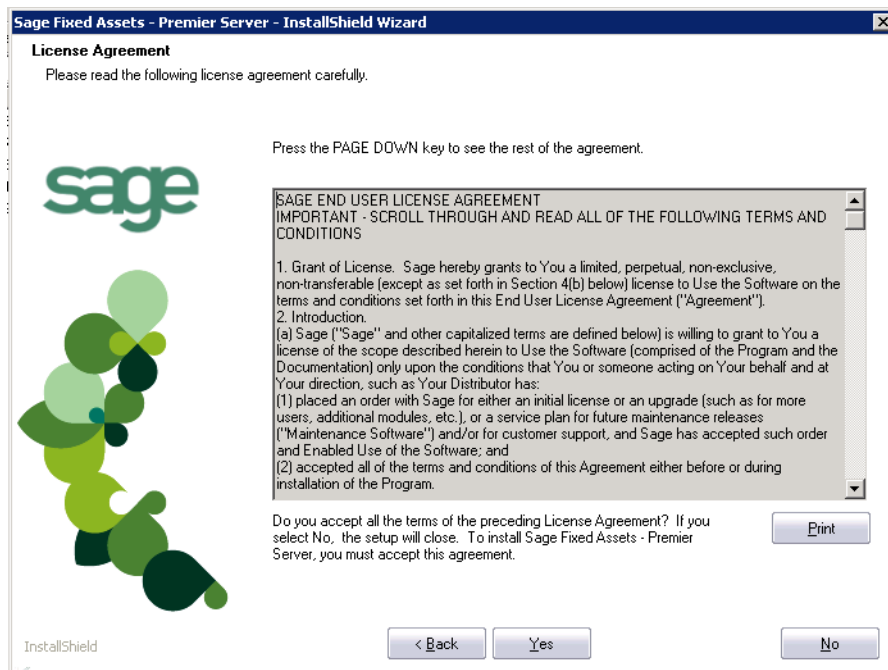


The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, Microsoft SQL Server 2008 Management Objects, and Microsoft SQL Server System CLR Types if it is not already installed.

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 License Agreement dialog appears.

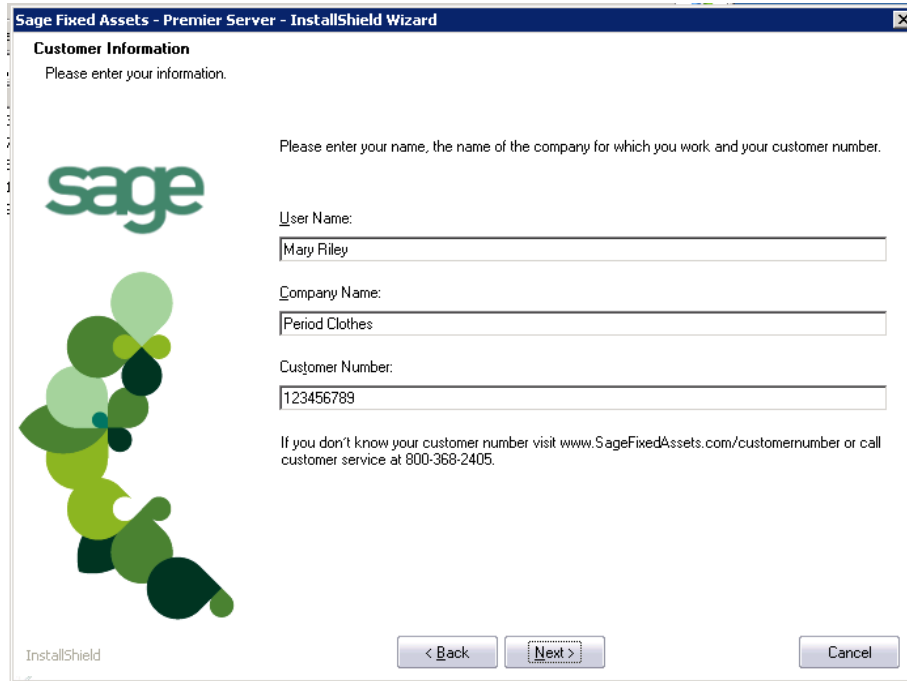


■ **Print Button**

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.)

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

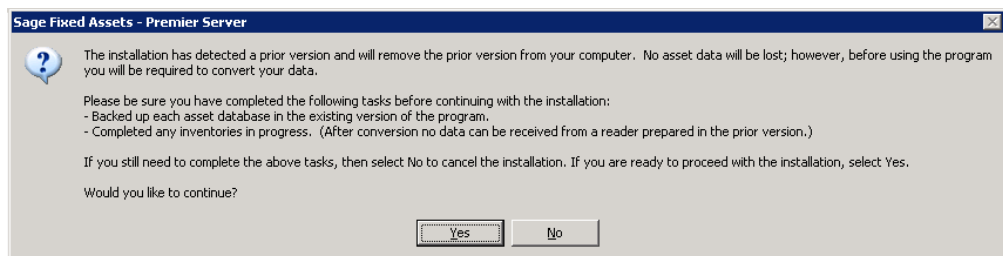


The screenshot shows a dialog box titled "Sage Fixed Assets - Premier Server - InstallShield Wizard". The main heading is "Customer Information" with the instruction "Please enter your information." On the left side, there is the Sage logo and a decorative graphic of overlapping green and blue circles. On the right side, there are three text input fields: "User Name:" containing "Mary Riley", "Company Name:" containing "Period Clothes", and "Customer Number:" containing "123456789". Below these fields is a note: "If you don't know your customer number visit www.SageFixedAssets.com/customernumber or call customer service at 800-368-2405." At the bottom, there are three buttons: "< Back", "Next >" (highlighted with a dashed border), and "Cancel".

10. 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.

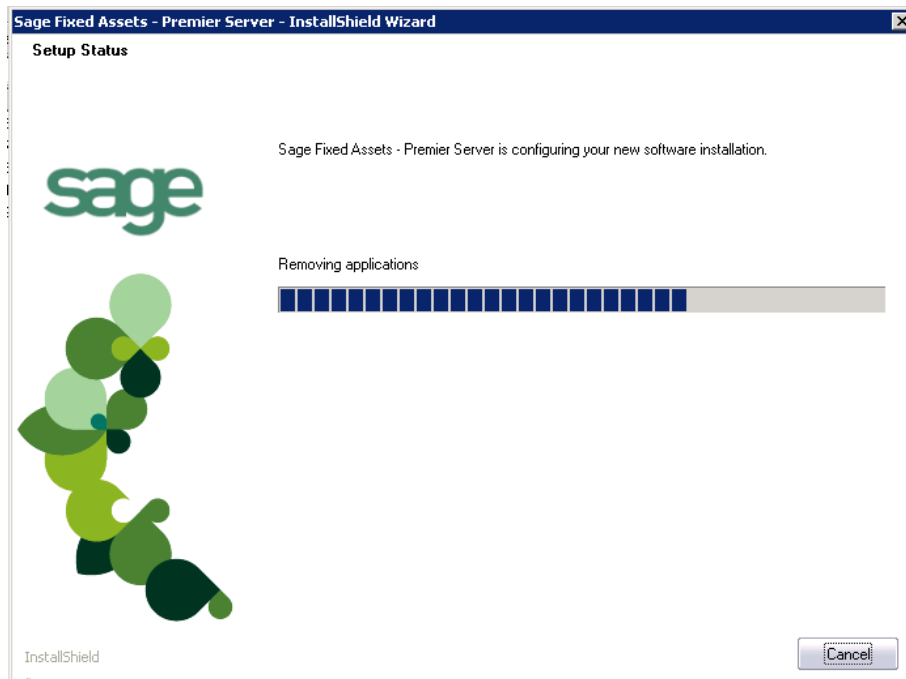
11. Click the Next button. A message appears indicating that a previous version of the program has been found on your computer.



The screenshot shows a dialog box titled "Sage Fixed Assets - Premier Server". It features a question mark icon in a blue circle. The text reads: "The installation has detected a prior version and will remove the prior version from your computer. No asset data will be lost; however, before using the program you will be required to convert your data." Below this, it lists two tasks: "- Backed up each asset database in the existing version of the program." and "- Completed any inventories in progress. (After conversion no data can be received from a reader prepared in the prior version.)" It then asks: "If you still need to complete the above tasks, then select No to cancel the installation. If you are ready to proceed with the installation, select Yes." and "Would you like to continue?" At the bottom, there are two buttons: "Yes" and "No".

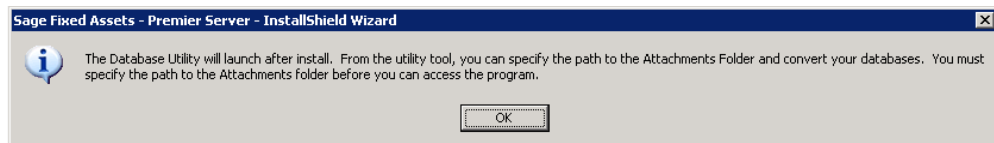
Note: If this message does not appear, make sure you are installing the server components on the machine where the previous Sage Fixed Assets server components were installed.

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

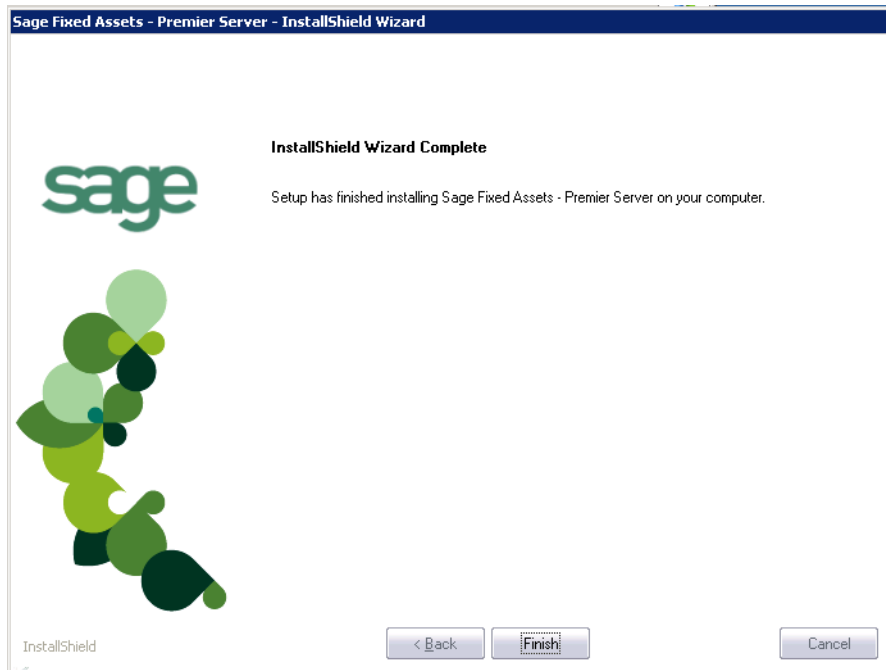


When all of the files have been installed, a message informs you that:

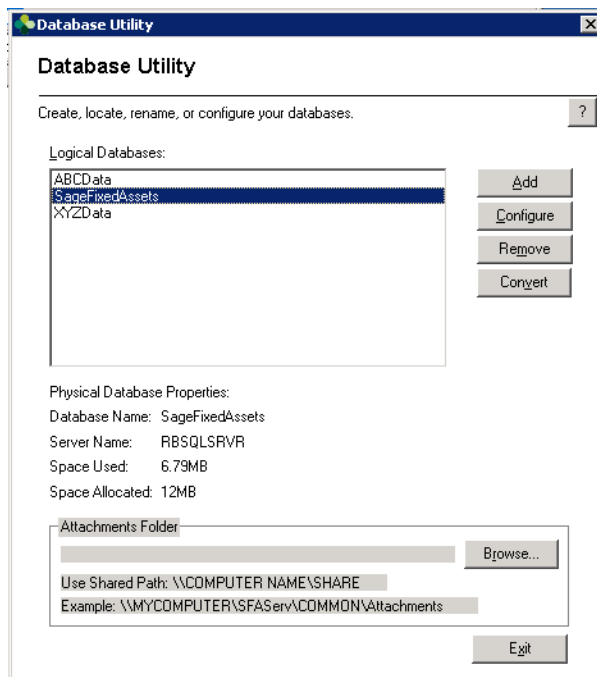
- The application will launch the Database Utility, and
- You MUST specify the attachments folder for PDF files attached to images.



- Click OK. The InstallShield Wizard Complete dialog appears.



14. Click the Finish button. The Database Utility dialog appears.



Step 3: Setting Up the Attachments Folder for PDFs

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

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

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

Setting up the attachments folder

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



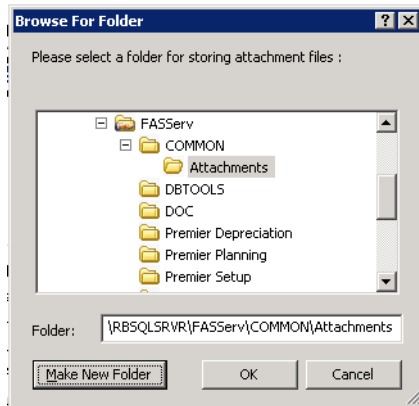
2. Select (or create) the folder that will contain the Adobe PDF file attachments.

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

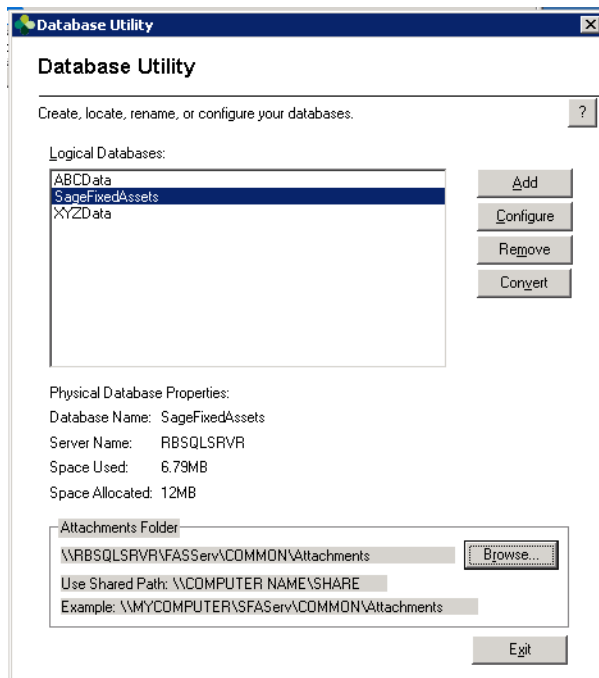
The directory path must appear in the format \\COMPUTER NAME\SHARE NAME\folder path. For example, if the computer name is “MYCOMPUTER” and the share name of the FASServ folder is “FASServ,” then the path to the existing attachments folder would appear as:

\\MYCOMPUTER\FASServ\COMMON\Attachments.

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



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



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

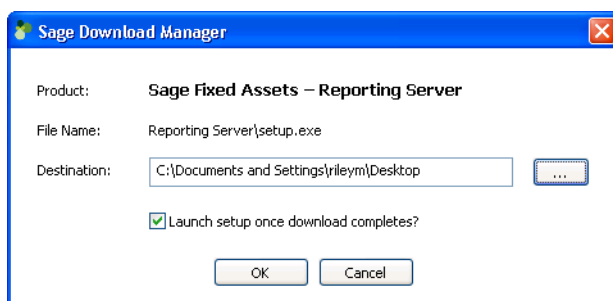
Step 4: Installing the Sage Fixed Assets—Reporting Server Components (Optional)

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

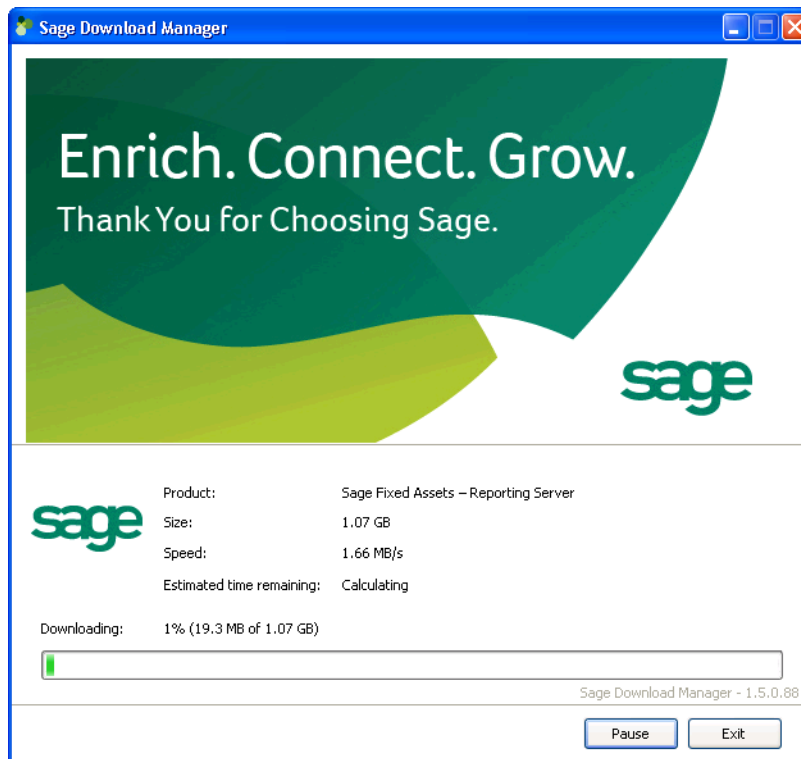
Note: The Sage Fixed Assets—Reporting program uses SAP® Crystal Reports 2011 (Crystal Reports), which requires 2 GB of hard disk space. Sage Fixed Assets—Reporting may not be compatible with other versions of Crystal Reports. Before installing Sage Fixed Assets—Reporting, we recommend that you make sure version Crystal Reports 2011 is compatible with your other applications that run Crystal Reports.

To install the Sage Fixed Assets—Reporting server components

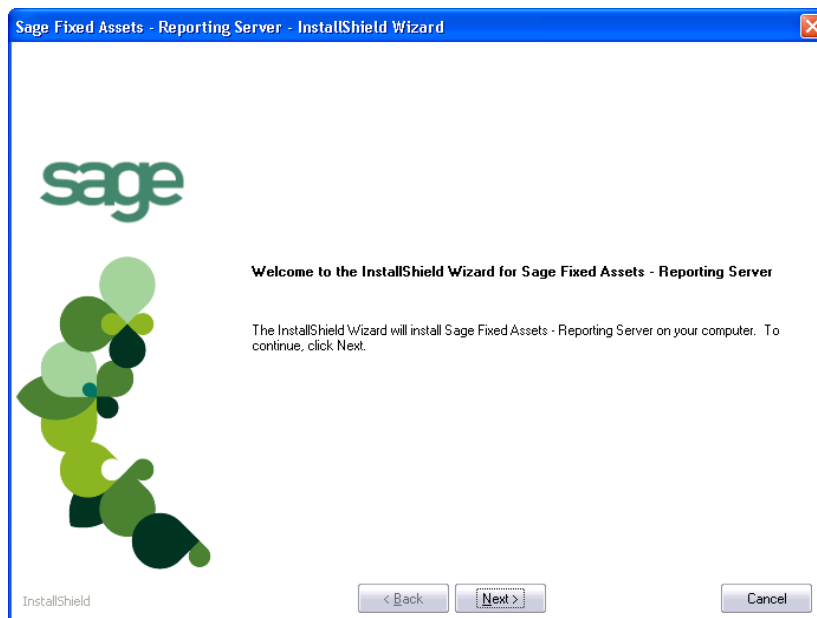
1. Log on to the Sage Knowledgebase at: <https://support.na.sage.com/>.
2. Under Browse Products on the left, click Sage Fixed Assets.
3. Enter Download 2015.2 in the text field and then click Search.
4. Find and then click the Download Sage Fixed Assets - Reporting Server hyperlink to open the product download article.
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 automatically displays the Sage Fixed Assets—Reporting Server Welcome dialog.



7. Click the Next button and follow the on-screen instructions.
8. Select the Install Sage Fixed Assets—Reporting Server option, and follow the on-screen instructions.

For instructions on installing the Sage Fixed Assets—Reporting client components, see [Chapter 10](#), “Installing Sage Fixed Assets—Reporting.”

Step 5: Converting Your Current Data

As new features and enhancements are added to the program, the system requires additional information to support the new features. This requires that changes be made to your 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.

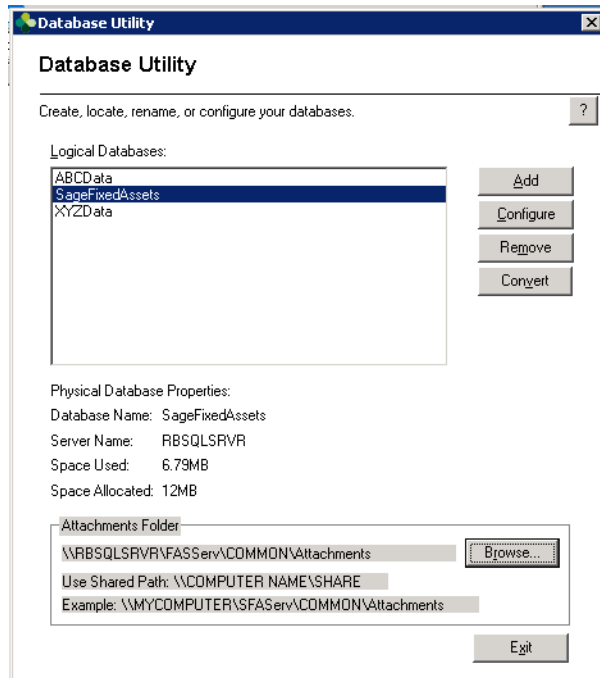
Note: You must be currently using a version of Sage Fixed Assets that is compatible with the latest version to follow the steps in this section. For information about which versions are compatible with the latest version of the application, see “[Previous Versions Compatible with the Latest Version](#),” page 6-1.

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

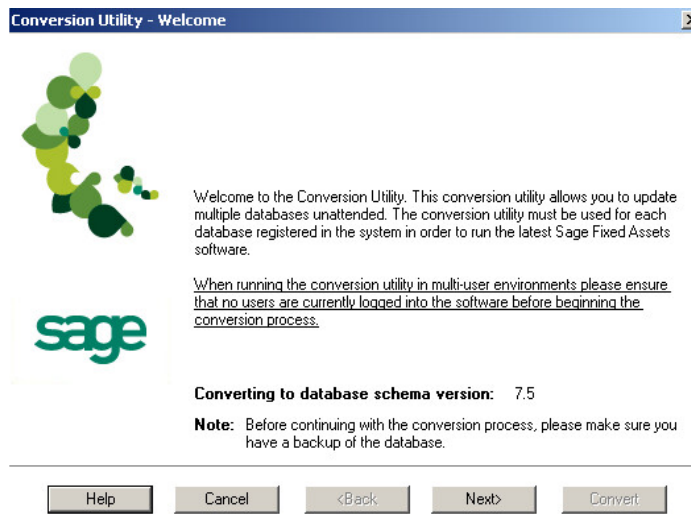
Note: A database conversion requires three to four GB of disk space. Make sure you have sufficient disk space before you convert your databases.

To convert your data

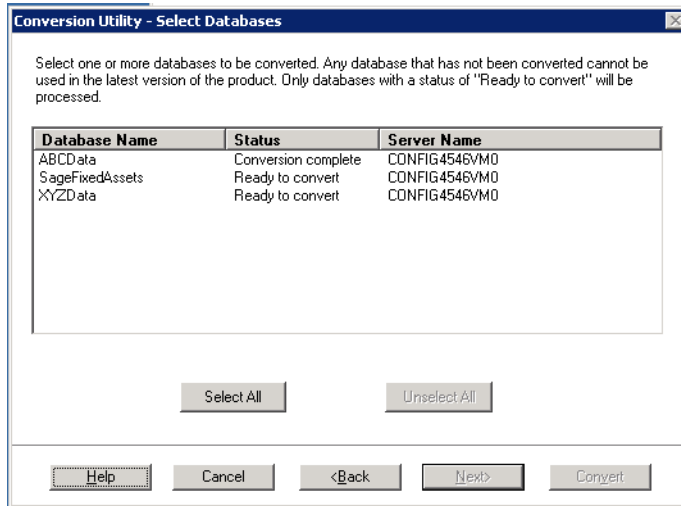
1. Click the Start button on the Windows taskbar, and then select Programs (or All Programs) from the Start menu.
2. Select the Sage Fixed Assets program group.
3. Select the Tools program group.
4. Select the Database Utility - Premier Depreciation & Tracking icon (or the Database Utility - Premier Planning icon). The Database Utility dialog appears.



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



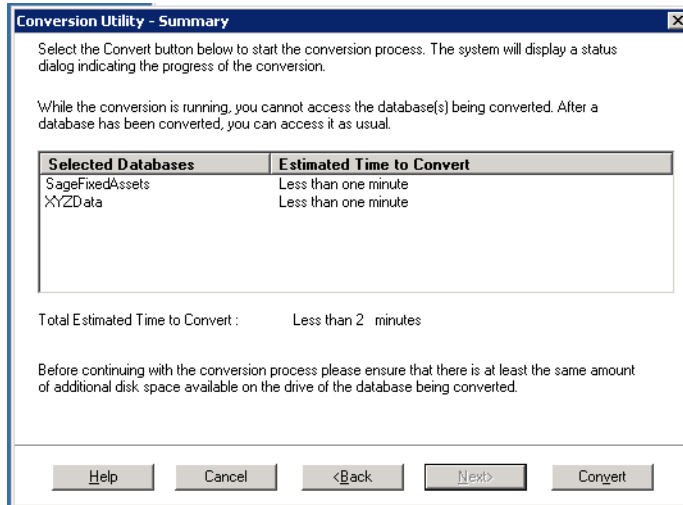
- Click the Next button. The application displays the Conversion Utility Select Databases dialog.



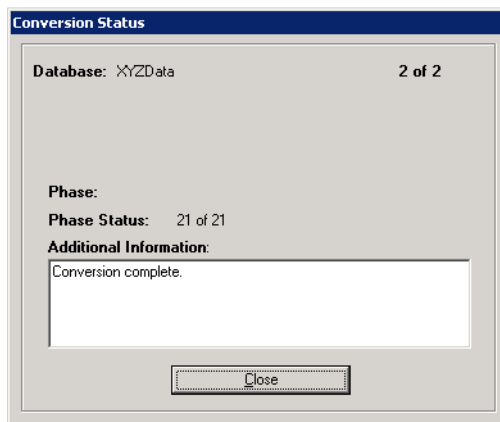
This dialog displays the status of each database.

- **Conversion Complete**
 This status indicates that the database has already been converted to the latest version.
- **Ready to Convert**
 This status indicates that the database is ready to be converted to the latest version.
- **Incompatible Version**
 This status indicates that the database cannot be converted because the database version is incompatible with the latest version of the application. For information about which versions are compatible with the latest version of the application, see [“Previous Versions Compatible with the Latest Version,”](#) page 6-1. 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 Customer Support.

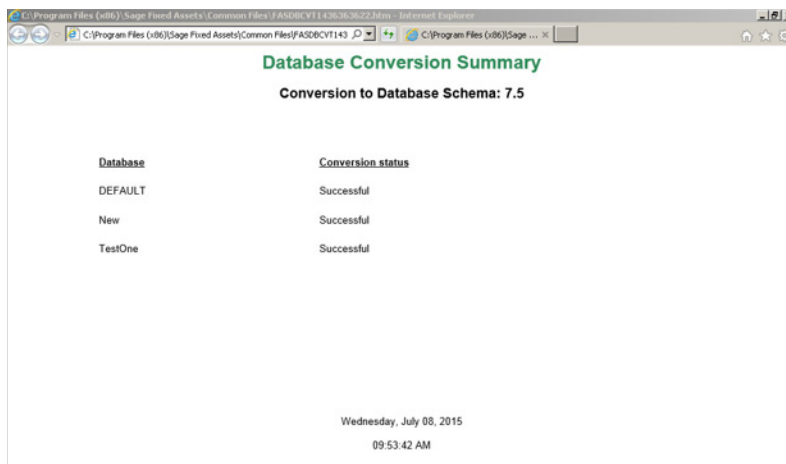
- Select the database(s) that you want to convert, and then click the Next button. The application displays the Conversion Utility Summary dialog.



- Review the Conversion Utility Summary dialog, and then click the Convert button. The application begins to convert the database(s) and displays a Conversion Status message box. When the conversion is complete, the application displays a “Conversion Complete” message in the Additional Information text box.



- Click the Close button. The application displays a report in your browser window which indicates how many databases have been converted.



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

Chapter 7

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

In this chapter:

Step 1: Upgrading the Client Components	7-1
Step 2: Starting the Application	7-6

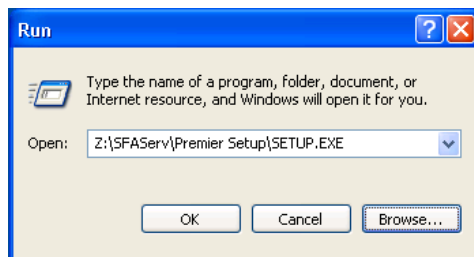
This chapter describes the steps for upgrading from a previous version of Sage Fixed Assets—Premier Depreciation.

Step 1: Upgrading the Client Components

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

To upgrade a client on a workstation

1. Do one of the following:
 - Go to My Computer, and browse to the network drive that you mapped in the previous step. Locate the folder in which you installed the server components (FASServ, BESTSERV, and SFAServ are the defaults), and double-click the SETUP.EXE file in the Premier Setup subfolder.
 - Select Start/Run from the Windows taskbar. The Run dialog appears. In the Run dialog, enter the UNC path (\\Servername\Foldername) to the folder containing the server components.
 - In the Run dialog, enter the mapped drive path to the folder (for example, Z:\FASServ\Premier Setup\SETUP.EXE).



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

Note: If you mapped the Z: drive to \FASServ, \BESTSERV, or \SFAServ, then the path would be:

Z:\Premier Setup\SETUP.EXE

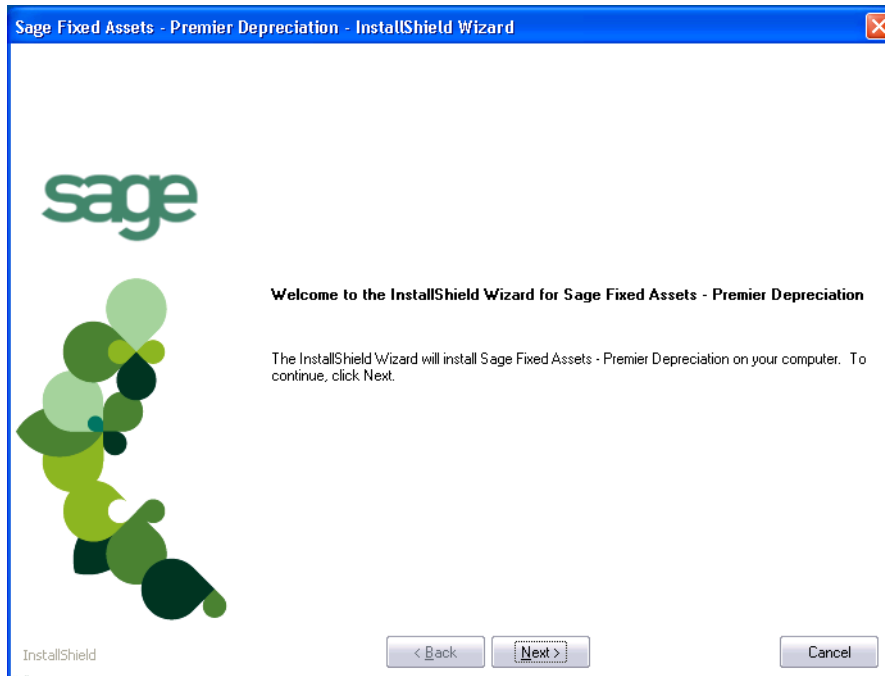
Note: The SETUP.EXE file is located on the machine on which you installed the server components; it is NOT on the installation CD.

2. Click OK. The Client Installation dialog appears.

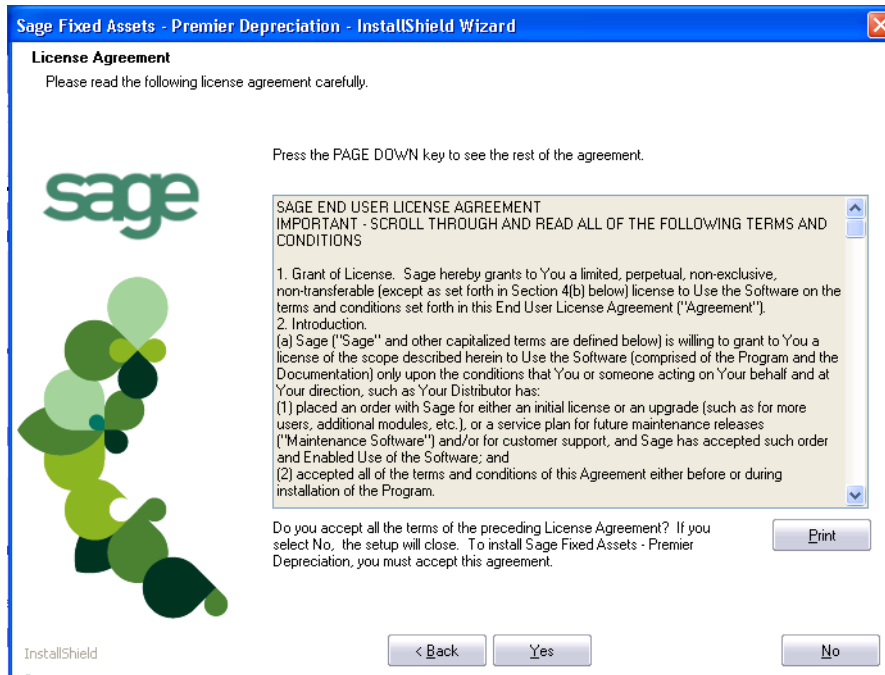


Note: The Install Sage Fixed Assets—Reporting option appears only if you have installed the Sage Fixed Assets—Reporting server.

3. Select the Install Sage Fixed Assets - Premier Depreciation option.
The system prompts you to install Sage Advisor Update, Microsoft .NET Framework, and Microsoft Visual C++ 2005 Redistributables if it is not already installed before you can install the application.
4. Click the Install button. The system installs the required components, and then displays the Welcome dialog. (You may need to restart your machine.)



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

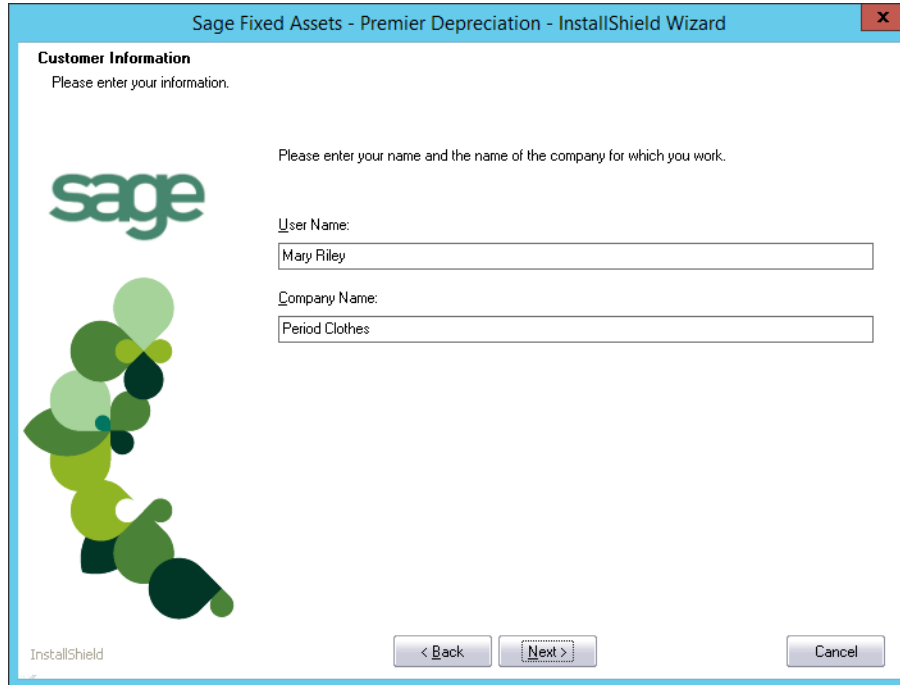


■ **Print Button**

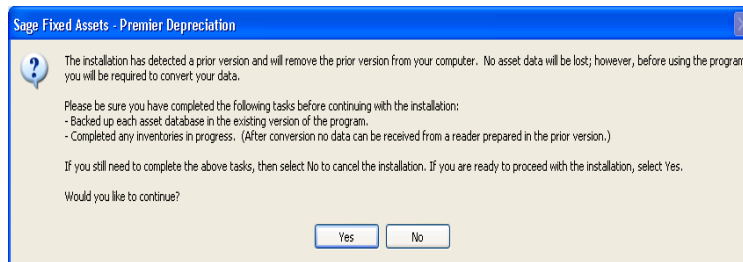
Click this button to send the license agreement to the default printer.

6. 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.)

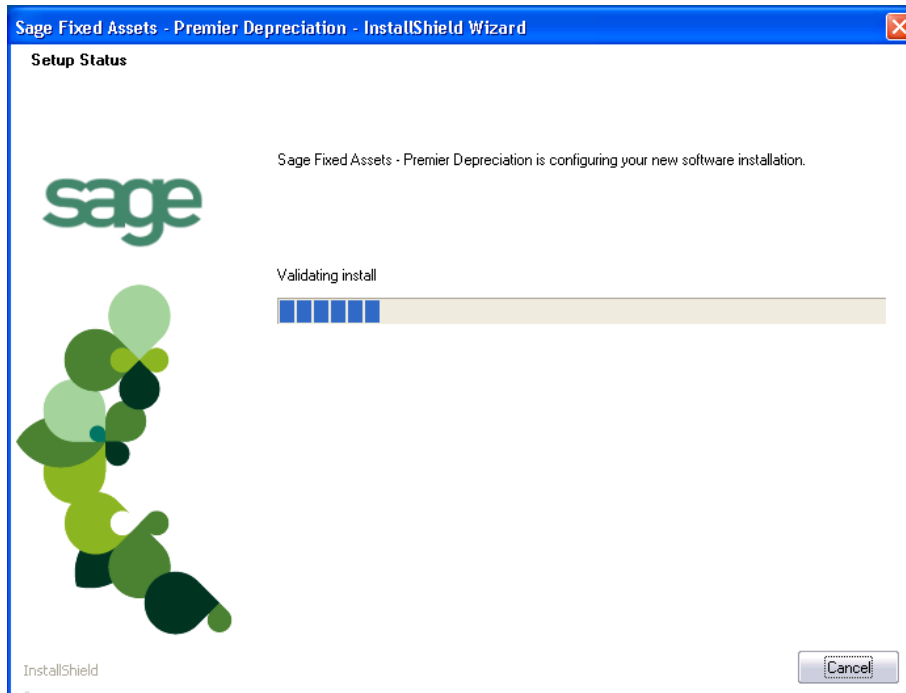
After you click the Yes button, the Customer Information dialog appears.



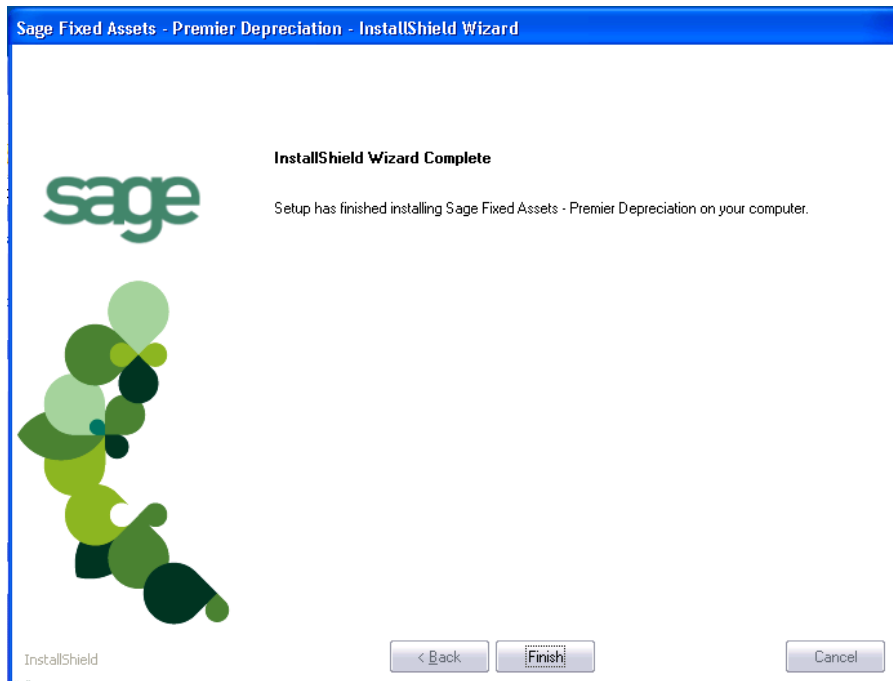
7. Enter your name and the name of the company.
8. Click the Next button. A message appears indicating that a previous version of the program has been found on your computer.



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



When all 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.

10. Click the Finish button. The system returns to the Client Installation dialog.
11. Click Exit to close the Client Installation dialog.

Note: The Client Installation dialog will not close immediately after the installation is completed because of background processes that continue to run.

Step 2: Starting the Application

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

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

To start the application from a workstation

1. Select Start/Programs (or All Programs) from the Windows taskbar.
2. Select the Sage Fixed Assets program group.
3. Select the Premier Depreciation icon.

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 - Premier Depreciation" 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:

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 8

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

In this chapter:

Step 1: Upgrading the Client Components	8-1
Step 2: Upgrading the Barcode Reader Program	8-6
Step 3: Starting the Application	8-10

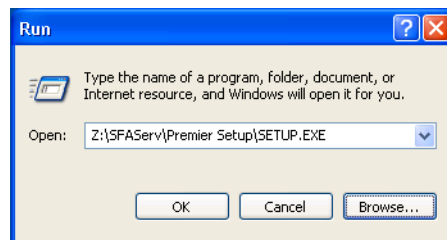
This chapter describes the steps for upgrading from a previous version of Sage Fixed Assets—Premier Tracking.

Step 1: Upgrading the Client Components

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

To upgrade a client on a workstation

1. Do one of the following:
 - Go to My Computer, and browse to the network drive that you mapped in the previous step. Locate the folder in which you installed the server components (FASServ, BESTSERV, and SFAServ are the defaults), and double-click the SETUP.EXE file in the Premier Setup subfolder.
 - Select Start/Run from the Windows taskbar. The Run dialog appears. In the Run dialog, enter the UNC path (\\Servername\Foldername) to the folder containing the server components.
 - In the Run dialog, enter the mapped drive path to the folder (for example, Z:\FASServ\Premier Setup\SETUP.EXE).



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

Note: If you mapped the Z: drive to \FASServ, \BESTSERV, or SFAServ, then the path would be:

Z:\Premier Setup\SETUP.EXE

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

2. Click OK. The Client Installation dialog appears.

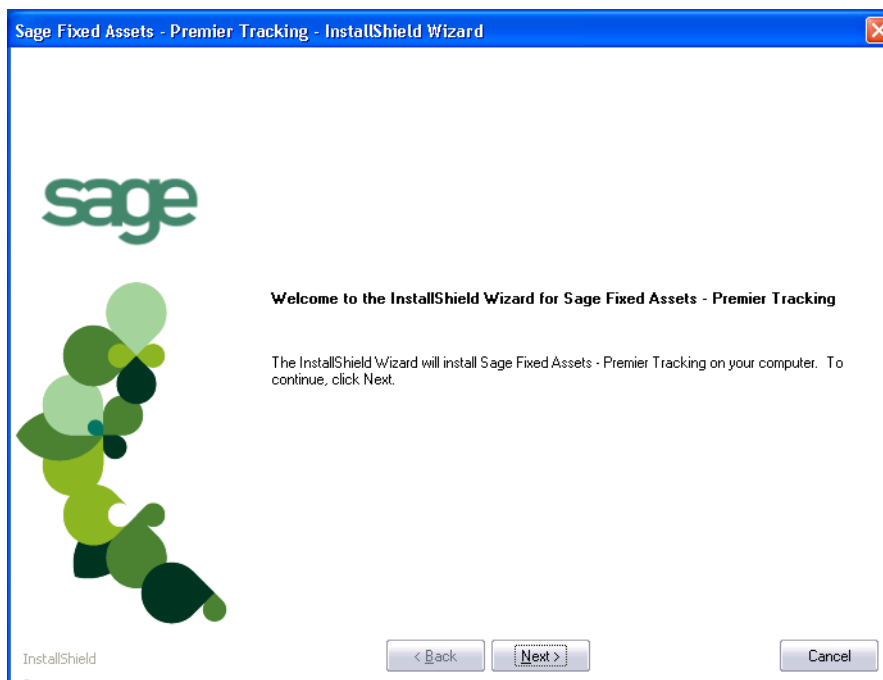


Note: The Install Sage Fixed Assets—Reporting option appears only if you have installed the Sage Fixed Assets—Reporting server.

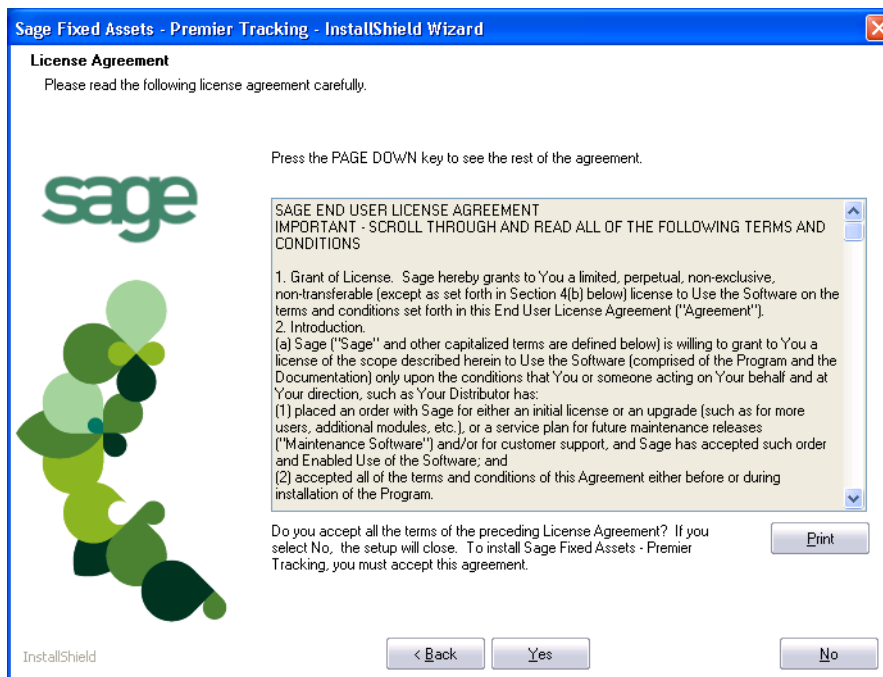
3. Select the Install Sage Fixed Assets—Premier Tracking option.

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

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



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

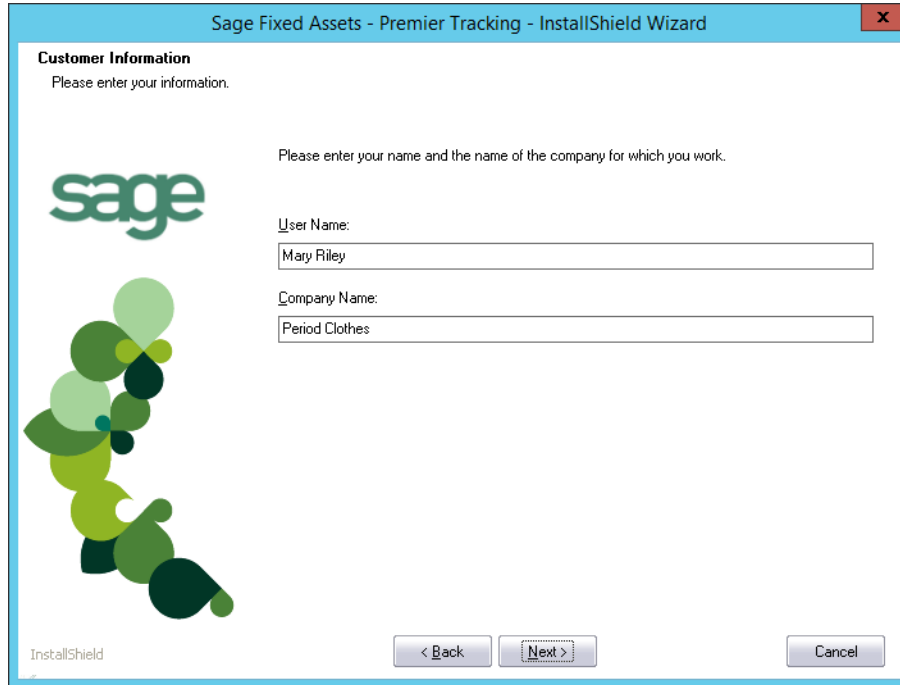


■ **Print Button**

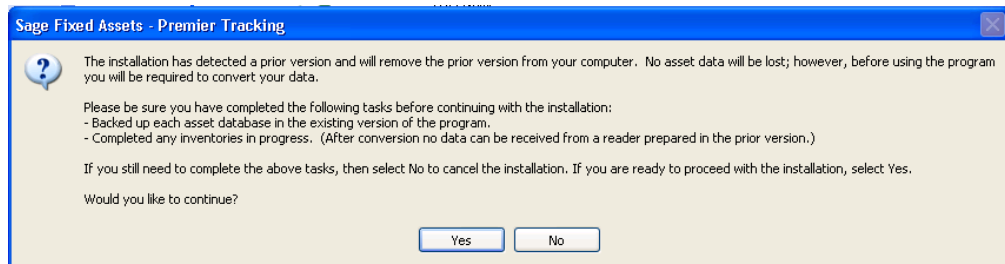
Click this button to send the license agreement to the default printer.

6. 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.)

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

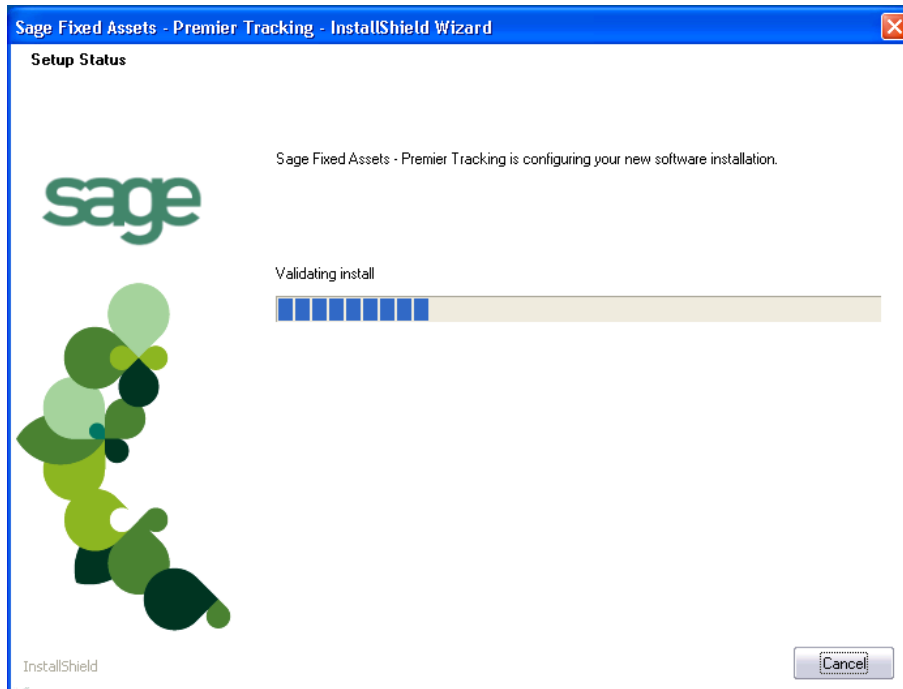


7. Enter your name and the name of the company.
8. Click the Next button. A message appears indicating that a previous version of the program has been found on your computer.

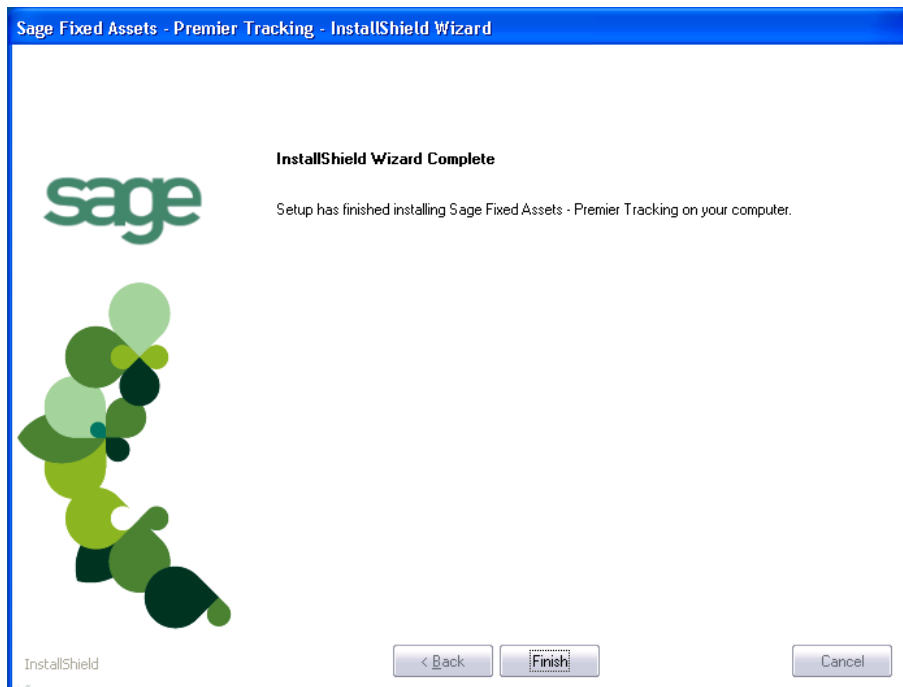


Note: Before you continue, make sure you do not have inventories in progress. After you install the latest version, the system will not be able to receive data from readers prepared in a prior version of the application.

9. Do one of the following:
 - **If you need to receive reader data, click No to cancel the installation. Reinstall the previous version of the application and receive the reader data before installing the latest version.**
 - Click Yes to remove the previous version of the application. The system removes the prior version and begins installing the software, and the Setup Status dialog appears.



When all 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.

10. Click the Finish button. The system returns to the Client Installation dialog.
11. Click Exit to close the Client Installation dialog.

Note: The Client Installation dialog will not close immediately after the installation is completed because of background processes that continue to run.

Step 2: 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—Premier 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—Premier Tracking. The default location is C:\Program Files\Sage Fixed Assets\Reader.

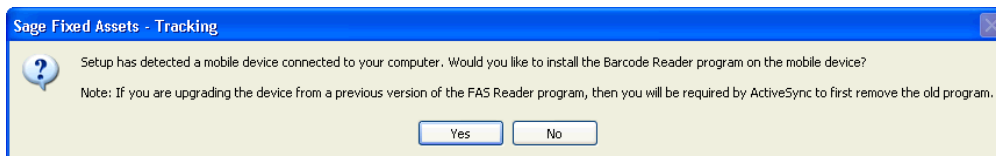
You may need to perform the steps above if you have purchased more than one reader.

To upgrade the Barcode Reader program

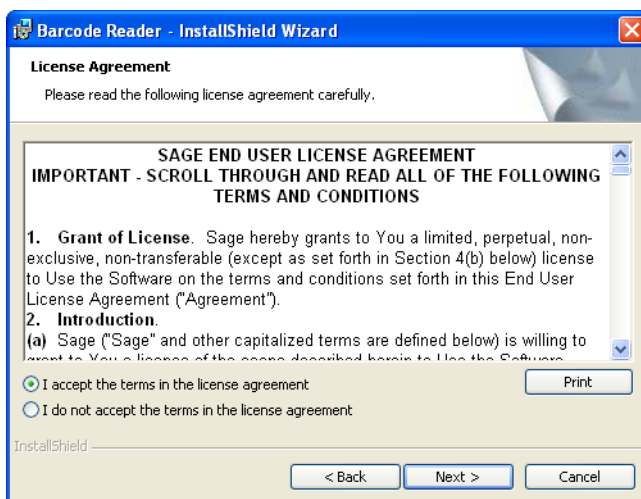
Complete the following steps if you have already installed a previous version of the Barcode Reader program on your physical device.

1. Before starting the Sage Fixed Assets—Premier 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—Premier Tracking installation process, the system asks if you would like to install the Barcode Reader program.

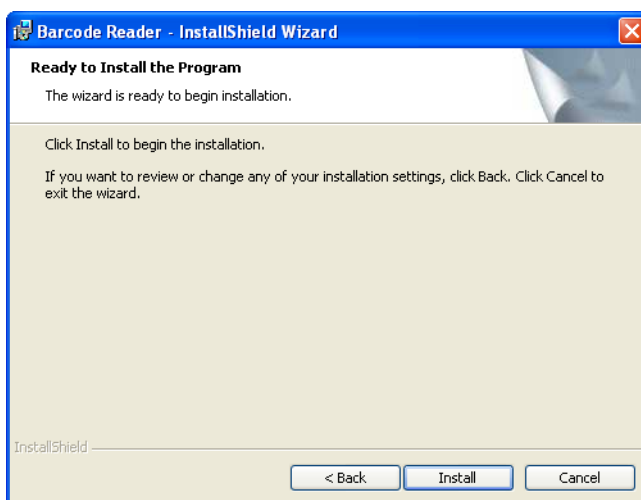


2. Click Yes. The Welcome dialog appears.
3. Click the Next button. The License Agreement dialog appears.



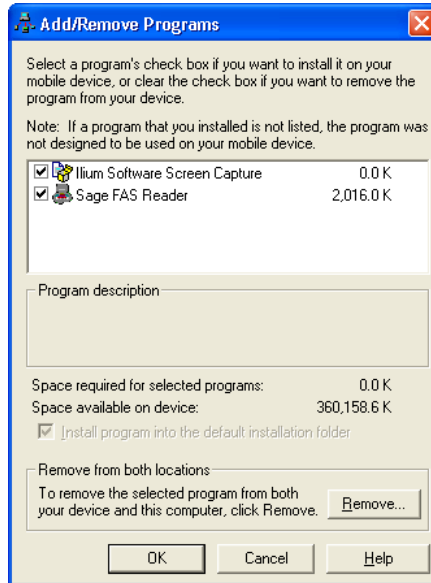
4. Read the license agreement, accept the terms of the license agreement, and then click the Next button. (If you do not accept the terms of the license agreement, click the Cancel button and the system exits from the installation program.)

The Ready to Install the Program dialog appears.

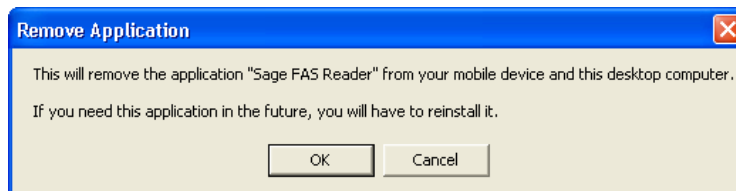


Note: Because you are upgrading the device from a previous version of the reader program, you will be required by ActiveSync or Windows Mobile Device Center to first remove the old program.

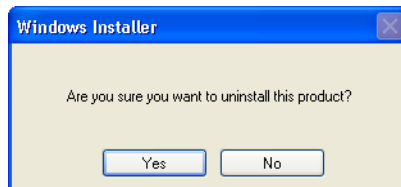
5. Click the Install button. The Add/Remove Programs dialog appears.



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.

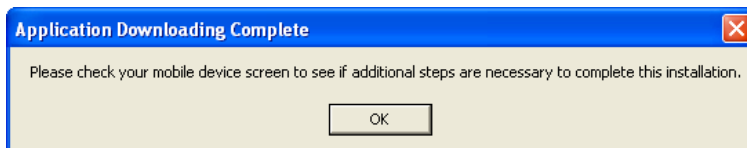


8. Click OK. The system displays a message that confirms your intention to uninstall the previous version of the program.

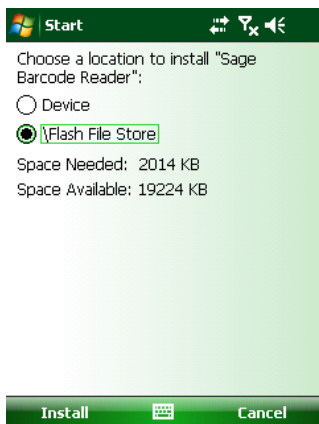


9. Click Yes. The system displays a dialog that indicates the progress of the installation of the new Barcode Reader program.

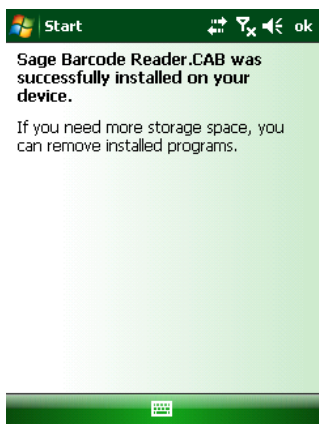
When the installation is complete, a message asks you to check your mobile device screen for additional steps to complete the installation.



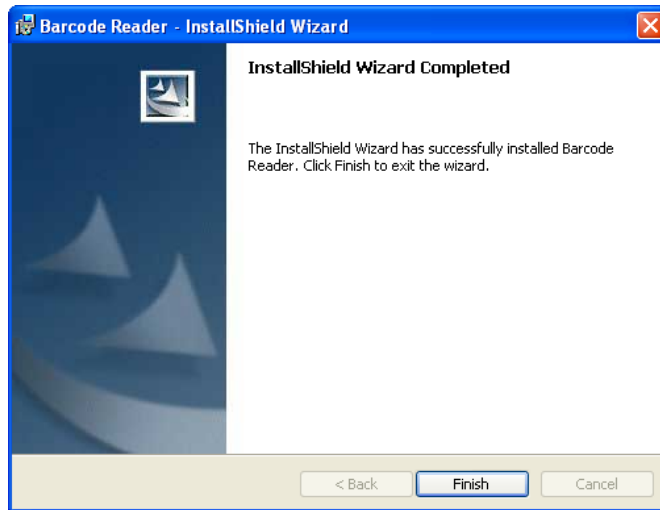
10. Click OK. On the physical device, a message allows you to select the location for installing the Barcode Reader program.



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 3: Starting the Application

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

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

To start the application from a workstation

1. Select Start/Programs (or All Programs) from the Windows taskbar.
2. Select the Sage Fixed Assets program group.
3. Select the Premier Tracking icon.

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.

Sage Fixed Assets - Premier Tracking

Update User Information

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

Name:
Mary Riley

Job Title:
Senior Accountant

Email:
Mary.Riley@pc.com

Company:
Period Clothes

Customer Number:
123456789

> [Where can I find my customer number?](#) OK 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 Tracking from the menu bar. A dialog appears that provides information about your program, including your customer number.

Chapter 9

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

In this chapter:

Step 1: Upgrading the Client Components	9-1
Step 2: Starting the Application	9-6

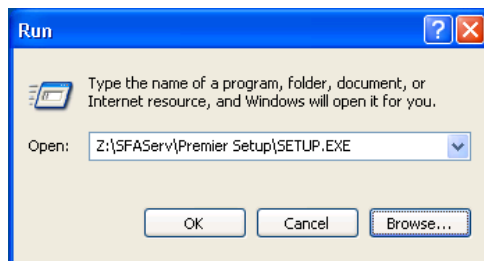
This chapter provides instructions for upgrading from a previous version of Sage Fixed Assets—Premier Planning.

Step 1: Upgrading the Client Components

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

To upgrade a client on a workstation

1. Do one of the following:
 - Go to My Computer, and browse to the network drive that you mapped in the previous step. Locate the folder in which you installed the server components (FASServ, BESTSERV, and SFAServ are the defaults), and double-click the SETUP.EXE file in the Premier Setup subfolder.
 - Select Start/Run from the Windows taskbar. The Run dialog appears. In the Run dialog, enter the UNC path (\\Servername\Foldername) to the folder containing the server components.
 - In the Run dialog, enter the mapped drive path to the folder (for example, Z:\FASServ\Premier Setup\SETUP.EXE).



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

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

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

2. Click OK. The Client Installation dialog appears.

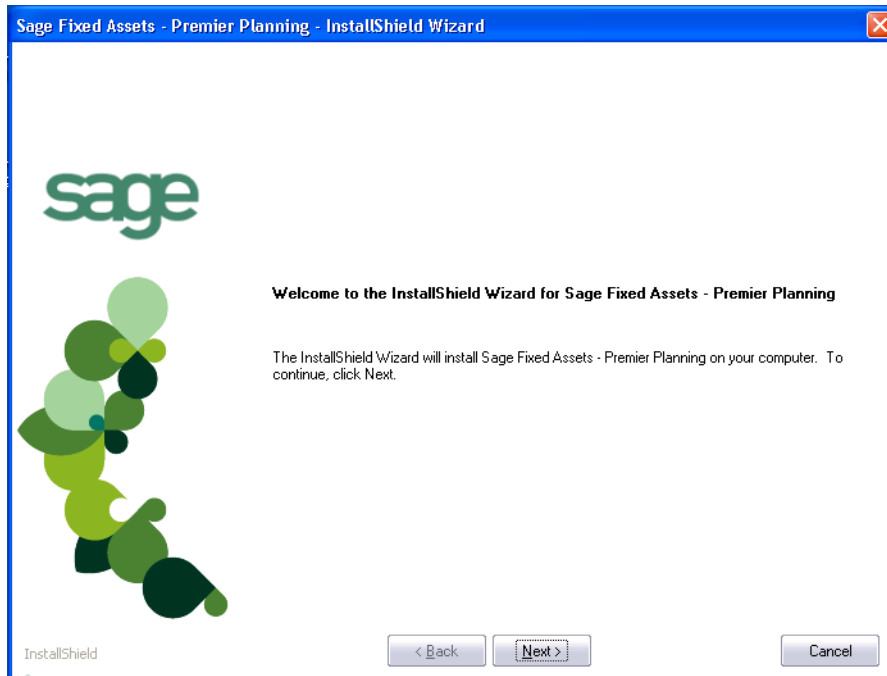


Note: The Install Sage Fixed Assets—Reporting option appears only if you have installed the Sage Fixed Assets—Reporting server.

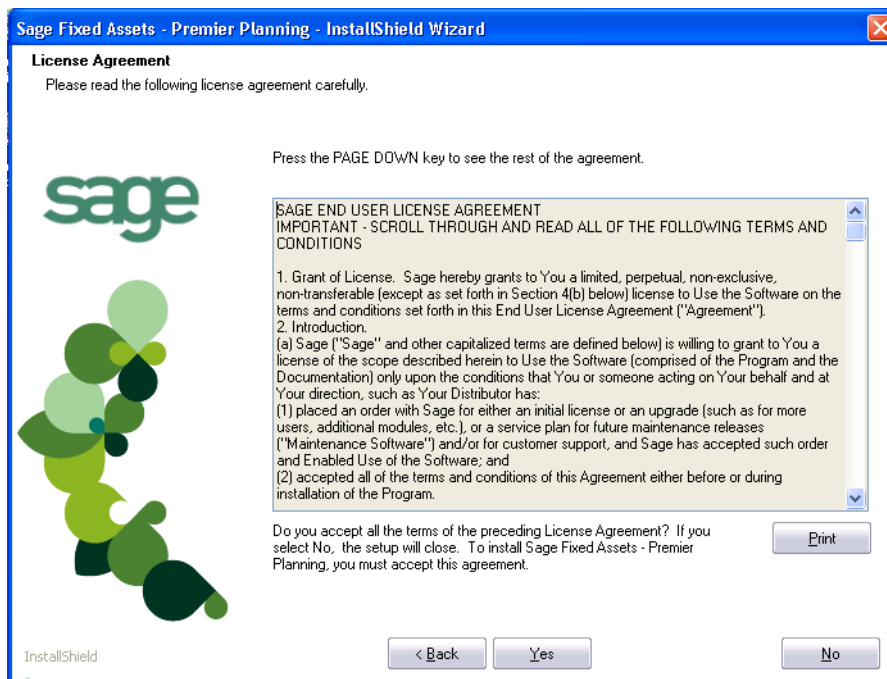
3. Select the Install Sage Fixed Assets - Premier Planning option.

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

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



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



■ **Print Button**

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

6. 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.)

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

Sage Fixed Assets - Premier Planning - InstallShield Wizard

Customer Information
Please enter your information.

Please enter your name and the name of the company for which you work.

sage

User Name:
Mary Riley

Company Name:
Period Clothes

InstallShield

< Back Next > Cancel

7. Enter your name and the name of the company.
8. Click the Next button. A message appears indicating that a previous version of the program has been found on your computer.

Sage Fixed Assets - Premier Planning

?

The installation has detected a prior version and will remove the prior version from your computer. No asset data will be lost; however, before using the program you will be required to convert your data.

Please be sure you have completed the following tasks before continuing with the installation:

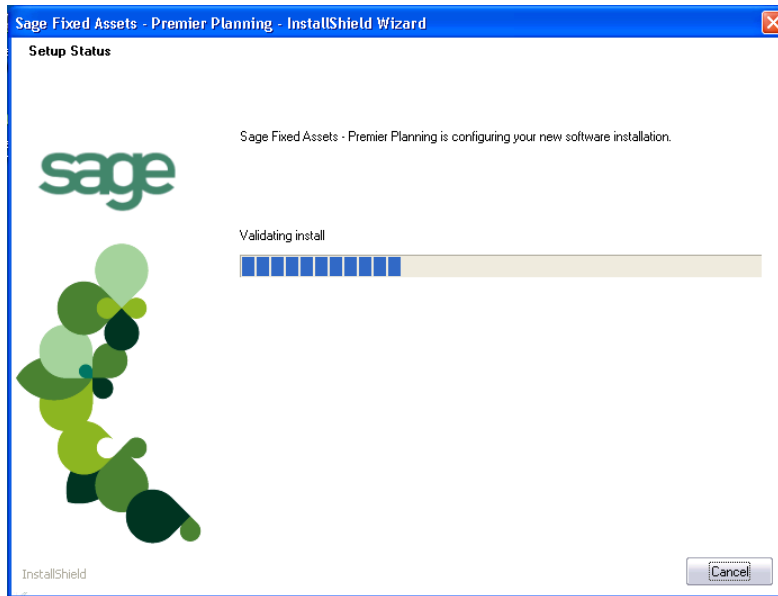
- Backed up each asset database in the existing version of the program.
- Completed any inventories in progress. (After conversion no data can be received from a reader prepared in the prior version.)

If you still need to complete the above tasks, then select No to cancel the installation. If you are ready to proceed with the installation, select Yes.

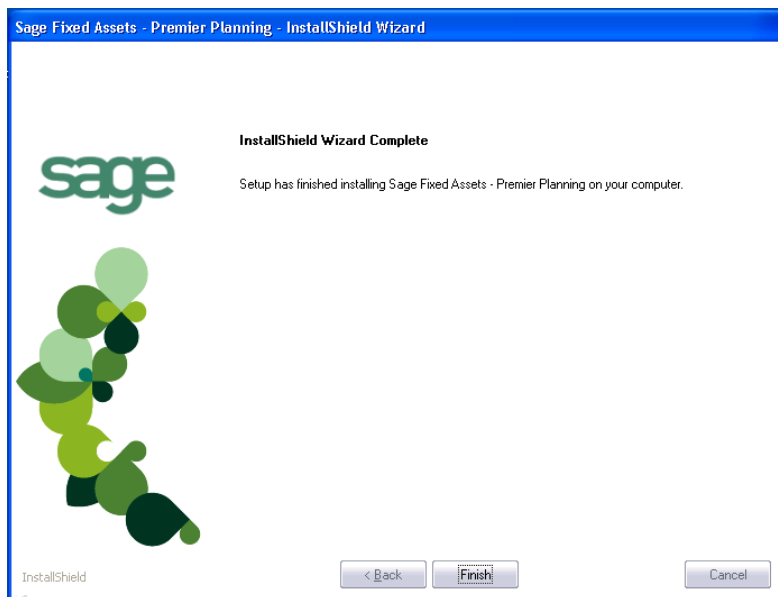
Would you like to continue?

Yes No

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



When all 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.

10. Click the Finish button. The system returns to the Client Installation dialog.
11. Click Exit to close the Client Installation dialog.

Note: The Client Installation dialog will not close immediately after the installation is completed because of background processes that continue to run.

Step 2: Starting the Application

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

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

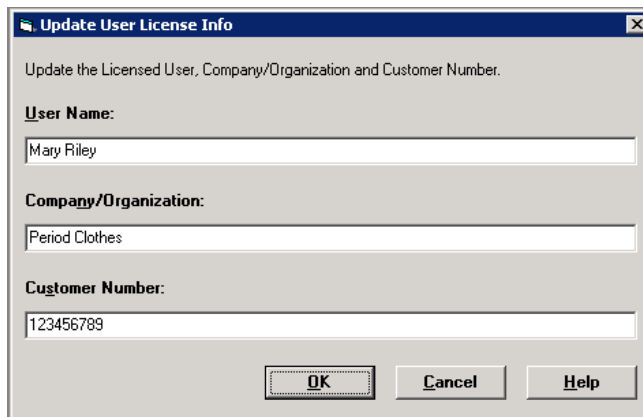
To start the application from a workstation

1. Select Start/Programs from the Windows taskbar.
2. Select the Sage Fixed Assets program group.
3. Select the Premier Planning icon.

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 10

Installing Sage Fixed Assets—Reporting

In this chapter:

Installing the Latest Version	10-1
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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 version Crystal Reports 2011 is compatible with your other applications that run Crystal Reports.

Installing the Latest Version

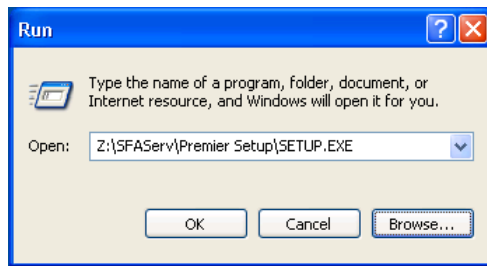
Before you begin to install the application, you should do the following:

- 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 install Sage Fixed Assets—Reporting

1. Select Start/Run from the Windows taskbar. The Run dialog appears.



■ **Browse**

Click this button to select the SETUP.EXE file.

The default directory path is: Z:\SFAServ\Premier Setup\SETUP.EXE.

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

Note: If you mapped the Z: drive to \SFAServ, then the path would be:

Z:\Premier Setup\SETUP.EXE.

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

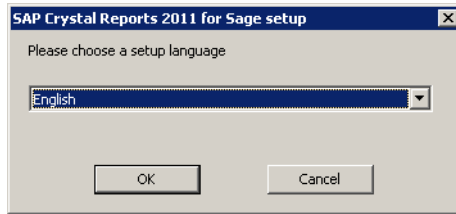
2. Click OK. The Client Installation dialog appears.



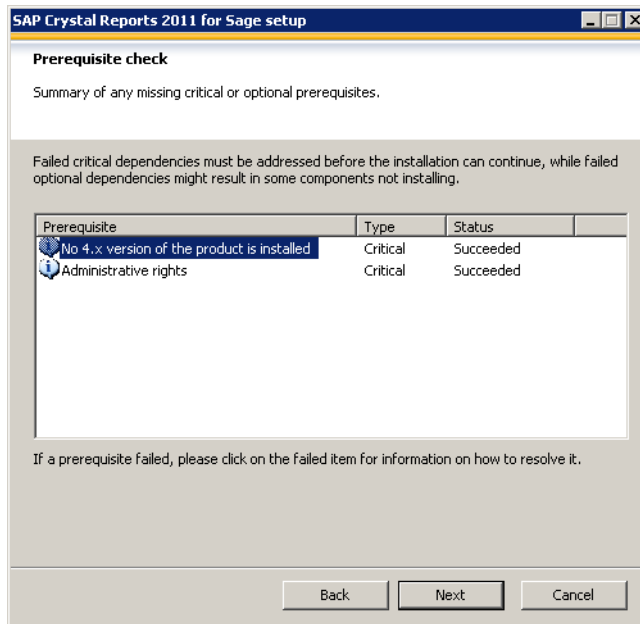
3. From the installation dialog, click the Install Sage Fixed Assets—Reporting option.

Note: The Install Sage Fixed Assets—Reporting option appears only if you have installed the Sage Fixed Assets—Reporting server. For more information, see “[Step 6: Installing the Sage Fixed Assets—Reporting Server Components \(Optional\)](#),” page 2-16.

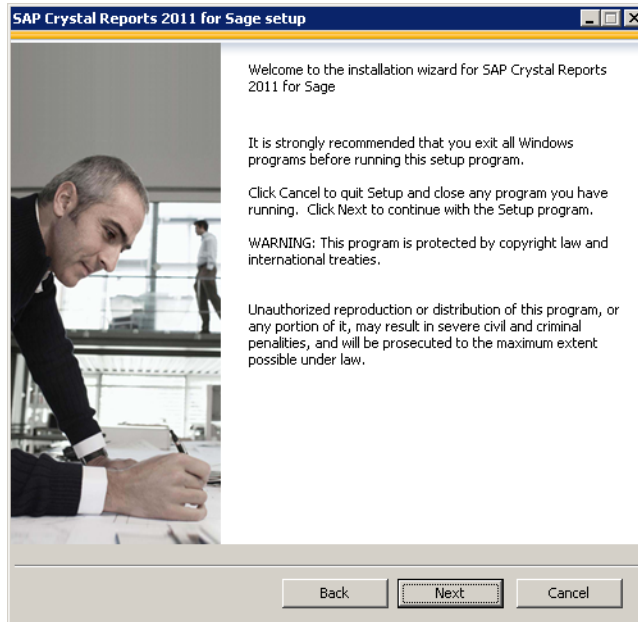
The SAP Crystal Reports 2011 for Sage setup language dialog appears.



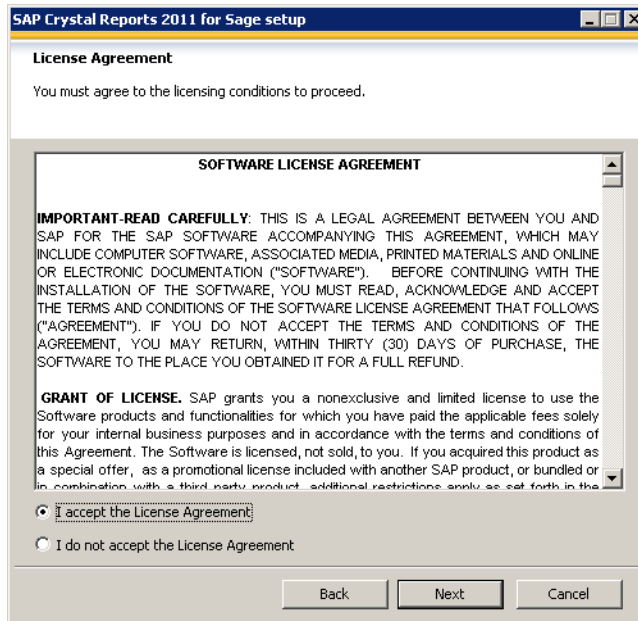
4. Select English from the drop-down list and click OK.
5. The system checks for critical prerequisites and displays the summary on the Prerequisite Check dialog.



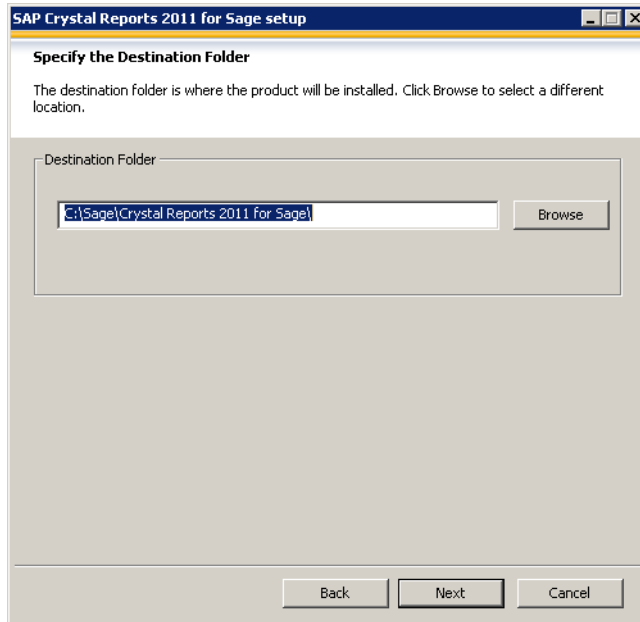
6. Click on the failed prerequisite, if any, for information how to resolve it. Otherwise, click the Next button to continue. The Welcome dialog appears.



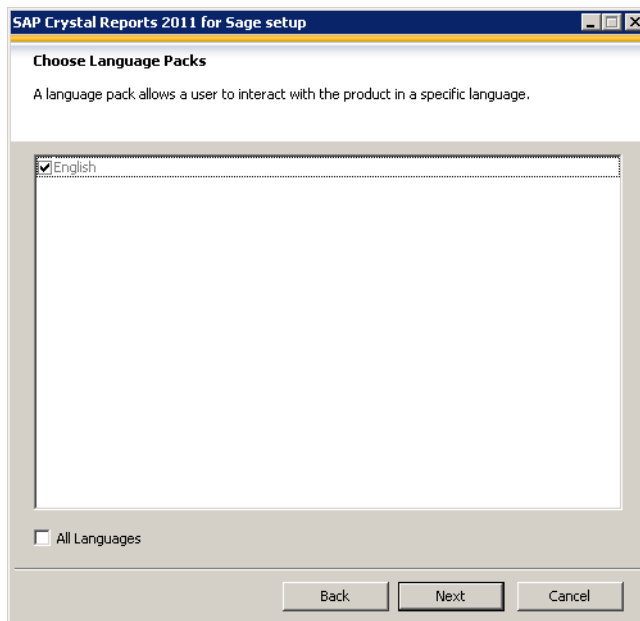
7. Click the Next button. The system displays the License Agreement.



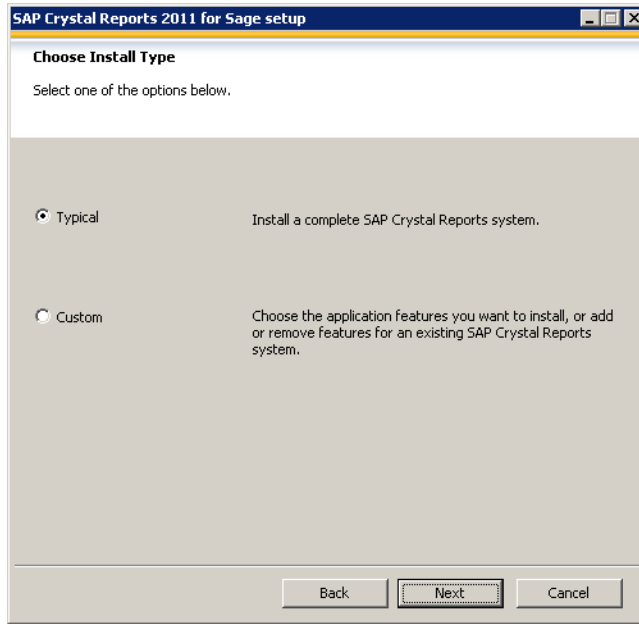
8. Select the I Accept the License Agreement option button, and then click the Next button. The system displays the Specify the Destination Folder dialog.



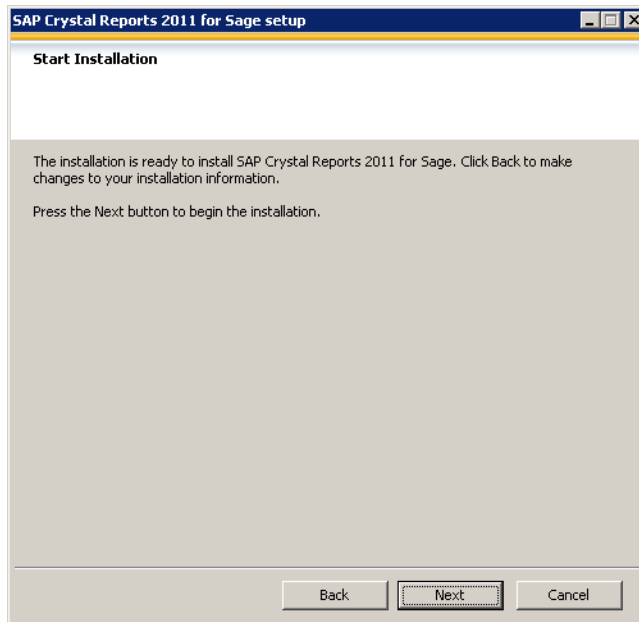
9. Select the folder in which to install the program, and then click the Next button. The system displays the Choose Language Packs dialog.



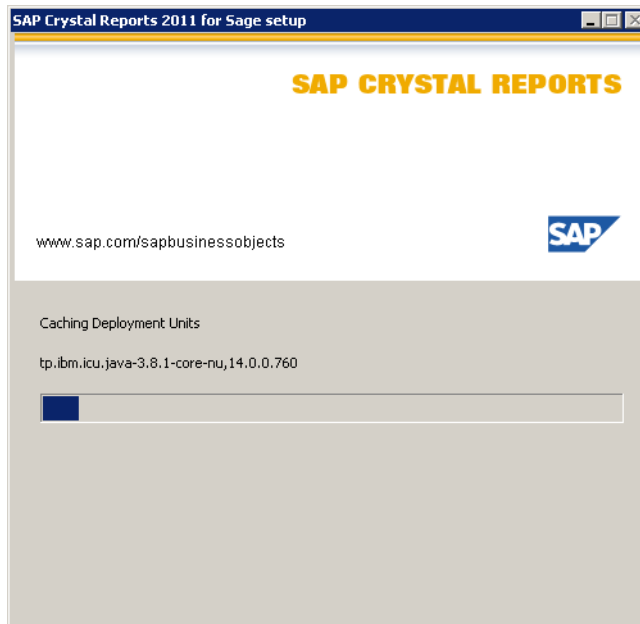
10. Make sure that the checkbox for the English language is selected, and then click the Next button. The system displays the Choose Install Type dialog.



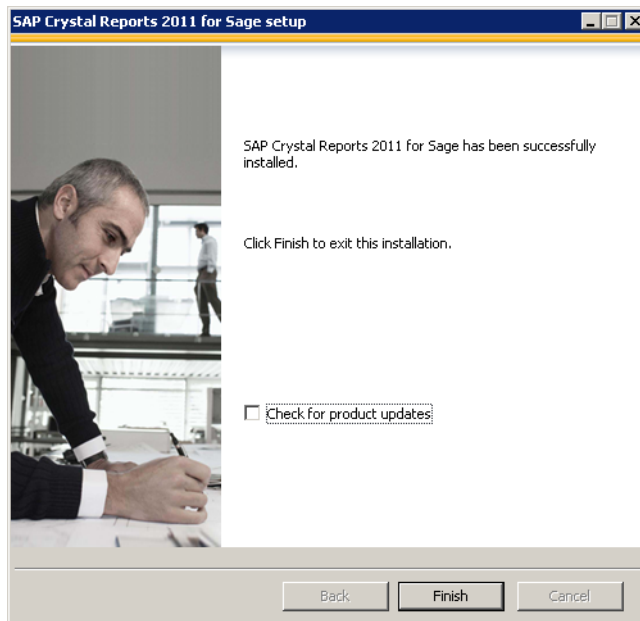
11. Leave the Typical option selected, and then click the Next button. The system displays the Start Installation dialog.



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



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



14. Clear the Check for Product Updates button.
15. Click the Finish button. The system displays the InstallShield Wizard Complete dialog.
16. Click the Finish button. The system returns to the Client Installation dialog.
17. Click the Exit button to close the dialog.

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

Chapter 11

Installing in a Microsoft Windows Terminal Server/Citrix Environment

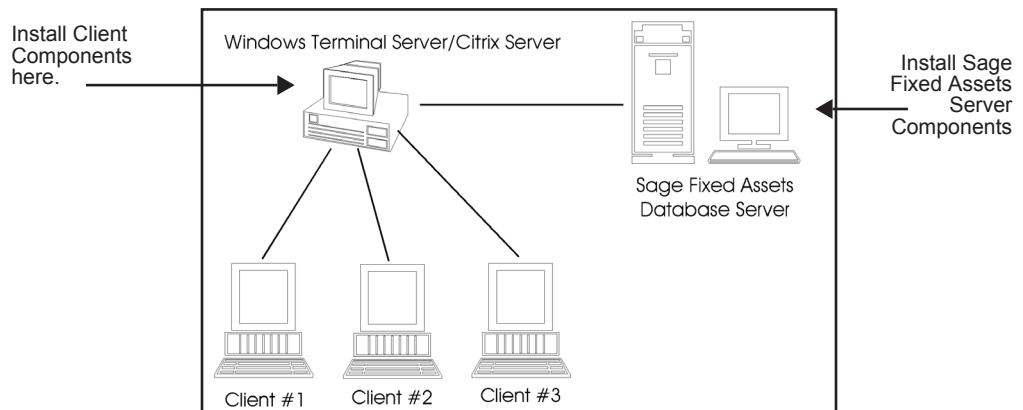
In this chapter:

Three-tiered Environment	11-1
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To manage fixed assets at a central location, and provide remote users with access to fixed asset data, you can install the application on a Windows Terminal Server (WTS) or in a Citrix environment.

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

Three-tiered Environment



To install in a three-tiered environment

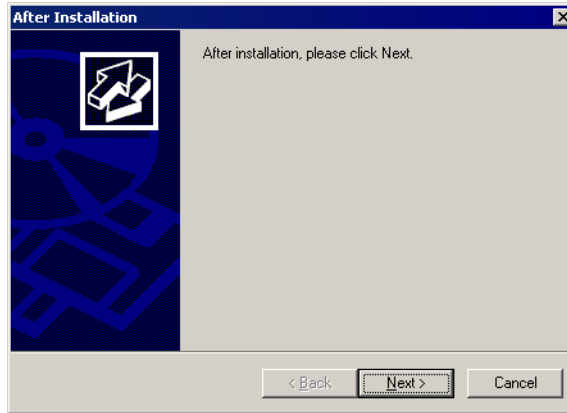
Perform these steps on the Database Server:

1. Perform the network server installation on the server that will run the database engine.
2. Share the SFAServ directory so that you can perform the client installation on the WTS server.

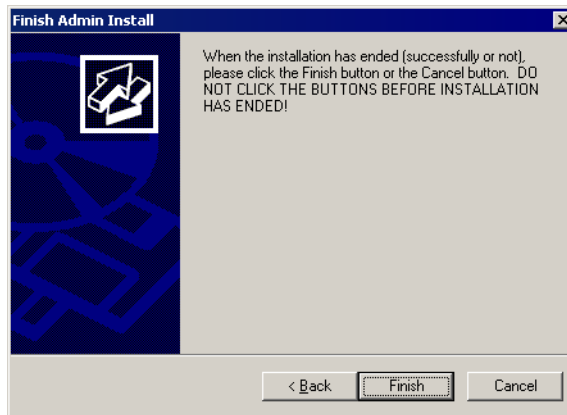
Perform these steps on the WTS/Citrix Server:

1. Map a drive to the shared directory SFAServ on the Database Server. **Windows Server 2008:** In the Control Panel, click the Install Application on Remote Desktop Server.
2. Click the Browse button, and select the SETUP.EXE file in the SFAServ\Premier Setup folder on the server.
3. On the Run Installation Program dialog, click the Next button. The Sage Fixed Assets client installation dialog appears.

4. Select the application that you want to install, and then follow the instructions on the installation dialogs.
5. After you install the client components, the After Installation dialog appears.



6. After the installation is complete, click the Next button. The Finish Administration Install dialog appears.



7. Click the Finish button. **IMPORTANT:** Do **NOT** click the Finish button before the installation has completed!

You are now ready to set up the client workstations to do one of the following:

- Run the ASSTACCT.EXE file, which is located in the following directory on the WTS server:
 \Program Files\Sage Fixed Assets\Premier Depreciation
- Run the ASSTINV.EXE file, which is located in the following directory on the WTS server:
 \Program Files\Sage Fixed Assets\Premier Tracking

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

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.

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