Sage Estimating (SQL)

(formerly Sage Timberline Estimating)

Installation and Administration Guide

Version 16.11

Contents

Contents

Chapter 1—Release Overview

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

Configuration Features in Sage Estimating

You will find the following configuration features in Sage Estimating:

- **Estimating Management Console.** The Estimating Management Console allows you to view and manage your databases, estimates, and roles and permissions. You can also use the Estimating Management Console to perform data migrations, share estimate layouts, view and manage estimates, and set up custom estimate reports.

- **Configuration wizard.** The Configuration wizard lets you designate a SQL Server instance to act as your Sage Estimating server. Using the Configuration wizard, you can also create the estimate database, upgrade existing data, and set up your software licensing and registration. For more information, see "D. Run the Configuration Wizard" on page 15.

Read the Supporting Documentation Before You Install

Be sure to read supporting documentation before you install Sage Estimating (SQL):

- This *Installation and Administration Guide* includes an overview of this release, installation instructions, system requirements, and contact information.

- The *Release Notes* provide details about new features, database changes, known issues, and fixes. This document is available in your Sage Estimating installation files in the **Documents** folder.

- The *Getting Started Guide* provides an operational overview of the Sage Estimating software. This document is available in your Sage Estimating installation files in the **Documents** folder.

- The *SQL Server Guide* gives you an overview of the significant differences between the new SQL Server databases and the Pervasive databases used in previous Sage Estimating releases. This document is available on your Sage Estimating installation files in the **Documents** folder.

- The *Options Guide* provides installation, setup, and operating instructions for each of the available Sage Estimating options, such as the OnScreen Takeoff Integrator or License Manager. This document is available in your Sage Estimating installation files in the **Documents** folder.

Conventions Used in this Document

This document uses the following conventions:

- Information you type into the software is shown in bold font. For example: Type **Miscellaneous** in the box.

- The names of screens, windows, fields, and other features displayed by the software are shown in **bold font**.

- The names of buttons you can click are enclosed in brackets with bold font. For example: [**OK**] or [**Post**].

- Names of keys are shown in capital letters. For example: ENTER or TAB. A plus sign (+) between two key names indicates you should press the keys simultaneously.

- Variable names or names that are specific to your installation may appear in italics and brackets. For example: [*Drive*]\\[*Server*].

Symbols

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

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

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

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

Menu Paths

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

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

Online Help

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

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

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

- **Contents** pane containing links to the help topics

- **Index** pane containing keywords that link to help topics related to that keyword

- **Search** pane, where you can type text and click [Search] to locate that text in the help topics

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

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

Training

Sage University offers online and classroom training sessions to help you get the most out of your Sage Estimating software. To access Sage University, visit www.sageu.com.

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

Technical Assistance

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

Submitting Enhancement Requests

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

Chapter 2—System Requirements

As with any software, as we continue to enhance Sage Estimating, you will realize optimal system performance by using up-to-date computer hardware. This includes memory as well as overall hardware specifications.

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 71213, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=76530.

For help in selecting the right business-class computers for your business-class software, contact your authorized business partner.

Access Rights

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

Elevate Permissions

You must elevate your permissions before installing Sage Estimating on Windows 7 and Windows 8.1. During certain installation tasks, you will receive another prompt to elevate your privileges. If you do not acknowledge each prompt within two minutes, the installation process will quit the task. If this occurs, you may receive a separate prompt asking you to retry the task. To retry the task, click [**Retry**] and then elevate your privileges at the prompt.

SQL Server Permissions

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

For more information on setting up SQL Server security for Sage Estimating, see "F. Set Up Roles and Permissions" on page 17.

Full Control of Specific Files and Folders Required

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

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

> **NOTE:** Some of these folders may be hidden. To view them:

- In Windows 7, open Windows Explorer, and then click **Organize**> **Folder and Search Options**> **View** tab > **Show hidden files and folders**.

- In Windows 8.1 and Windows 10, open Windows Explorer, click the **View** tab, and then select the **Hidden items** check box in the **Show/hide** group.

Table 1: Folders and Files Requiring Operator Control

Product	Operating Systems	Required Folders and Files	Location and Specifications
Sage Estimating	64-bit Windows systems	*[Drive]*:\Program Files (x86)\Sage Estimating	This folder is located on the file server, terminal server, and workstations where you installed Sage Estimating. It is the default installation location for Sage Estimating. However, depending on your system configuration, your company may have renamed this folder or installed it to a different location.
Sage Estimating	Windows 7, Windows 8.1	*[Drive]*:\Users\Public\Sage Estimating **-and-** *[Drive]*:\ProgramData\Sage Estimating	These folders are located on the workstation or terminal server where you use Sage Estimating. Sage Estimating installs necessary files to these folders and requires that the user has full control of them.

Full Control and Read Access to Specific Registry Keys Required

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

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

- HKEY_CURRENT_USER

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

- HKEY_Local_Machine\Software\ODBC

- HKEY_Local_Machine\Software\Wow6432Node\Sage

Supported Upgrade Paths

If you plan to use your estimate data from a release earlier than version 9.6, you must upgrade your data to Sage Estimating 9.6 or later prior to migrating your data. Refer to "Chapter 4—Data Migration" on page 23 for data migration instructions.

NOTE: Do not install previous releases of Sage 300 Construction and Real Estate (formerly Sage Timberline Office) after installing Sage Estimating 16.11. The new Sentinel driver is incompatible with previous releases.

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

If desired, you can install this version of Sage Estimating without uninstalling your previous Sage Estimating installation. However, because the data format is different, you cannot migrate data to this release from releases of Sage Estimating earlier than version 9.6 without upgrading your data first.

Chapter 3—Installation and Configuration

Installation and Configuration Categories

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

- Scenario 1: Set up in a server/workstation domain

- Scenario 2: Set up in a workgroup environment

- Scenario 3: Set up on a standalone computer

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

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

At the Server:

1. Pre-installation checks—**section A**
2. Install/Configure SQL Server—**section B**
3. Install/Upgrade License Manager (optional)—**section H**

Server (Databases will reside here)

Workstation   Workstation   Workstation

At the Workstation:

4. Pre-installation checks—**section A**
5. Install Sage Estimating—**section C**
6. Run the Configuration wizard—**section D**
7. Migrate your data (from 1st workstation only, optional)—**section E**
8. Set up roles and permissions (from 1st workstation only)—**section F**
9. After you complete your setup—**section I**

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

At the Host:
1. Pre-installation checks—**section A**
2. Install/Configure SQL Server—**section B**
3. Install Sage Estimating—**section C**
4. Run the Configuration wizard—**section D**
5. Migrate your data (optional)—**section E**
6. Set up roles and permissions—**section F**
7. Set up your firewall exceptions—**section G**
8. Install/Upgrade License Manager (optional)—**section H**

Host Workstation
(Databases will reside here)

Workstation   Workstation   Workstation

At the Workstations:
 9. Pre-installation checks—**section A**
10. Install Sage Estimating—**section C**
11. Run the Configuration wizard—**section D**
12. After you complete your setup—**section I**

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

Workstation

At the Workstation:
1. Pre-installation checks—**section A**
2. Install/Configure SQL Server—**section B**
3. Install Sage Estimating—**section C**
4. Run the Configuration wizard—**section D**
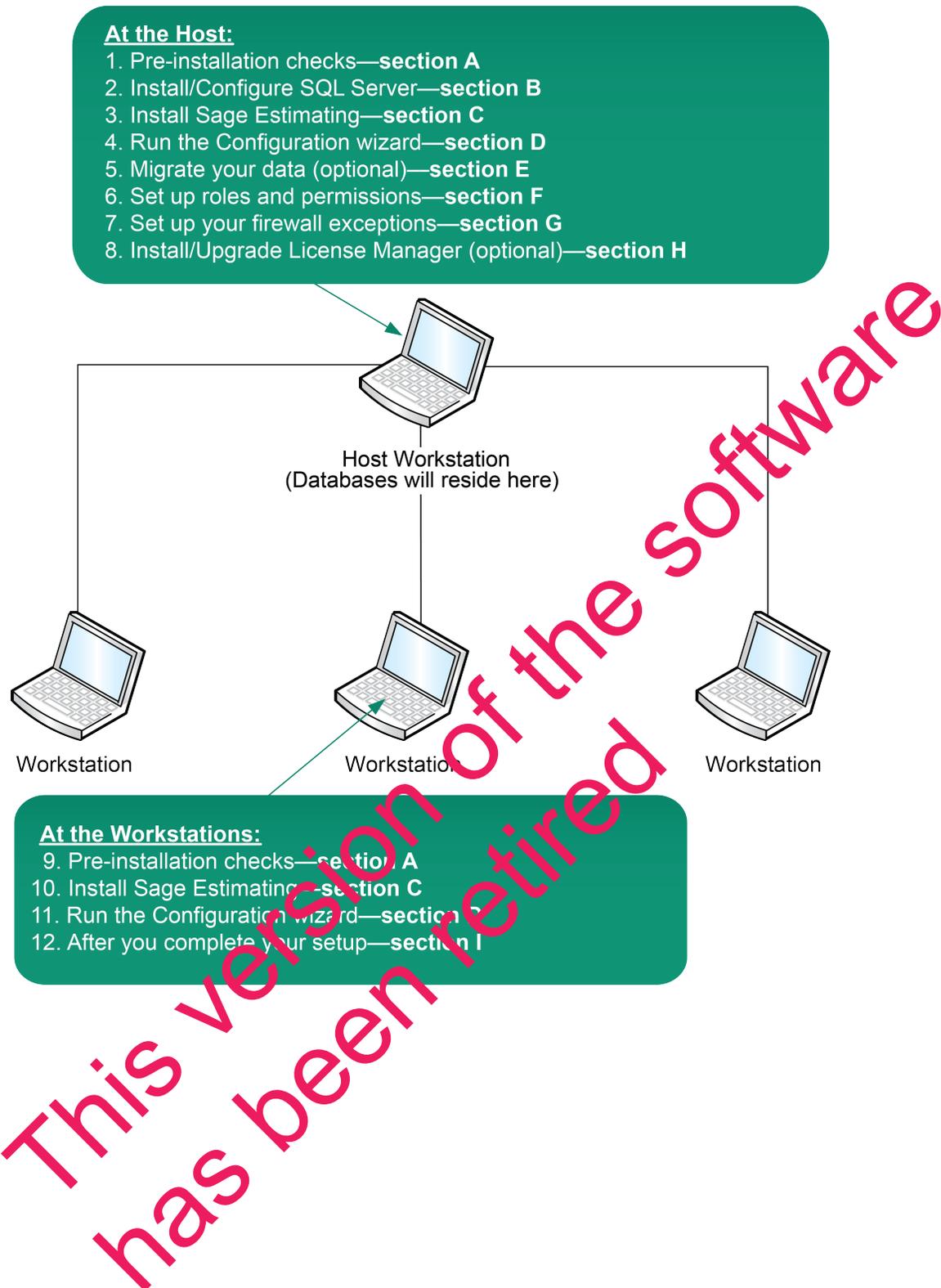5. Migrate your data (optional)—**section E**
6. Set up roles and permissions—**section F**
7. After you complete your setup—**section I**

A. Before You Install or Upgrade

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

1 If you are currently using a previously-released version of Sage Estimating, create a complete backup copy of all Sage Estimating data and program files before installing this release.

2 Install the appropriate operating system service pack level, make sure that there is sufficient hard disk space available, and ensure that your server and workstations meet all other hardware and software requirements.

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 71213, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=76530.

3 Make sure that you have full control of the necessary folders, files, and registry keys on your file server, terminal server, and workstations that will have Sage Estimating installed. For a list of the required folders, files, and registry keys for your operating system, see "Chapter 2—System Requirements" on page 5.

4 Close all programs and services for the duration of the installation. This includes programs that may be running in the background such as antivirus, email, and backup programs.

5 If you do not have Sentinel protection devices attached to your computer, do not attach these devices until after you install Sage Estimating. If you already have Sentinel protection devices attached, you can leave these devices in place during the Sage Estimating installation.

6 Decide which installation scenario to follow. See "Installation and Configuration Categories" in the previous section.

7 You must have the appropriate permissions to perform certain tasks described in this chapter. Contact your Sage Estimating administrator if you require additional permissions.
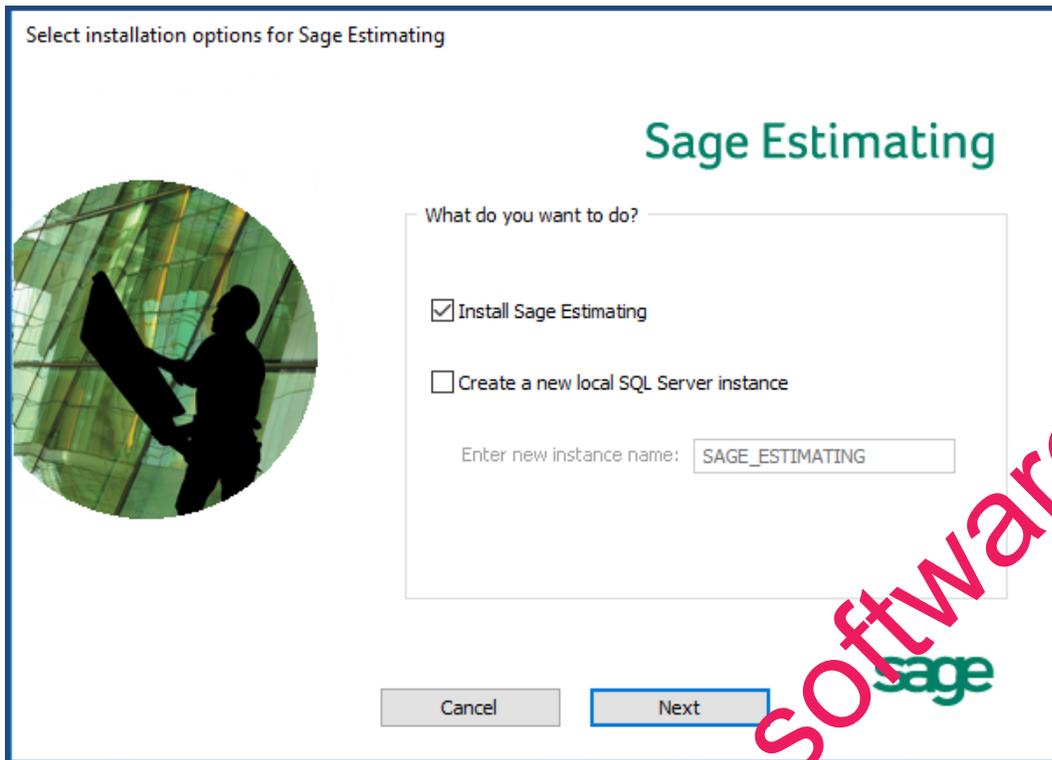
B. Install Sage Estimating

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

> ✳ **IMPORTANT:** Do not install Sage Estimating unless you have sufficient hard disk space available.
>
> For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 71213, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=71530..
>
> • Do not install previous releases of Sage 300 Construction and Real Estate after installing Sage Estimating. The new Sentinel drive is incompatible with previous releases.

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

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

2 Double-click the **SetMeUp.exe** file in your local Sage Estimating install folder.

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

3 When prompted by the **User Account Control** dialog box, click [**Yes**] to allow the program to make changes to the computer.

4 Read the terms of the Sage License Agreement, and then click [**Accept**] to accept them.

5 On the Sage Estimating installation window that appears, select **Sage Estimating**.

Selecting this option alone installs the Sage Estimating software and support components, but does not install a new instance of SQL Server Express. If you need to create a new SQL Server instance, follow the instructions in the next section, "C. Install/Configure SQL Server".

6 Follow the remaining steps as prompted by the installation process, which guides you through the installation of Sage Estimating products and required support software.

   NOTES:
   - The installation process may restart your computer during the installation. Ensure you close all programs and applications before starting the installation to avoid losing any data. If your computer restarts, log on to your computer again.

   - If you choose to upgrade data from a previous version of Sage Estimating, the process may take up to four hours, depending on the size of your database. Plan accordingly.

7 Repeat steps 1 through 6 or each workstation or server where you want to install Sage Estimating. (For more detailed information, refer to scenarios 1, 2, and 3 on "Installation and Configuration Categories" on page 9.)

C. Install/Configure SQL Server

If you are installing Sage Estimating for the first time, or if you want to create a new SQL Server Instance, install or configure a supported version of SQL Server on the server or workstation where you want to store your Sage Estimating data.

A copy of SQL Server Express is included with the Sage Estimating installation.

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 71213, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=76530.

- If you want to use an existing installation of SQL Server, refer to "Chapter 5—Configuring SQL Server" on page 27 for settings for creating and configuring a new instance.

- If Microsoft® SQL Server® is not already installed on the server or workstation where you plan to keep your Sage Estimating databases, and you want to install the copy of SQL Server Express that comes with Sage Estimating, select the **Create a new local SQL Server instance** option during installation.

    If you are operating in a workstation/server environment (see "Installation and Configuration Categories" on page 9), you do not need to install SQL Server on the workstations.

> **NOTES:** At the instance name prompt, type a name for the new SQL Server instance (database server) in the box, and then click [**OK**].
>
> The default instance name is **SAGE_ESTIMATING**, but you can give the instance any name you want provided you do not give it the same name as any existing SQL Server instance on the computer.
>
> - If you plan to migrate existing data from Pervasive-based Sage Estimating (version 9.6 and later) to version 16.11, you must install SQL Server on the destination computer or server.
>
> - The installation process may restart your computer. If your computer restarts, log back onto your computer at the prompt.
>
> - You can install an approved instance of SQL Server side by side on a computer where SQL Server 2008 R2 or SQL Server 2012 is also installed. Be aware that installing Sage Estimating may result in an "Install completed with errors" message. However, the resulting Sage Estimating install operates correctly.
>
> - Sage recommends *against* installing SQL Server Express on a domain controller.

D. Run the Configuration Wizard

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

1 Start the Configuration wizard as follows, depending on your operating system:

- **For Windows 7:** Click **Start** > **All Programs** > **Sage** > **Estimating 16.11** > **Configuration Wizard**.

- **For Windows 8.1 or Windows 10:** Click the **Configuration Wizard** tile on the Start menu, or right-click outside the tile area, and then click **All apps** > **Sage** > **Configuration Wizard**.

NOTE: Depending on your version of Windows, you may need to elevate your permissions before starting the Configuration wizard by right-clicking **Configuration Wizard** (or the desktop icon), and then selecting **Run as administrator**.

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

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

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

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

Figure 4: Selecting Features for Registration and Activation
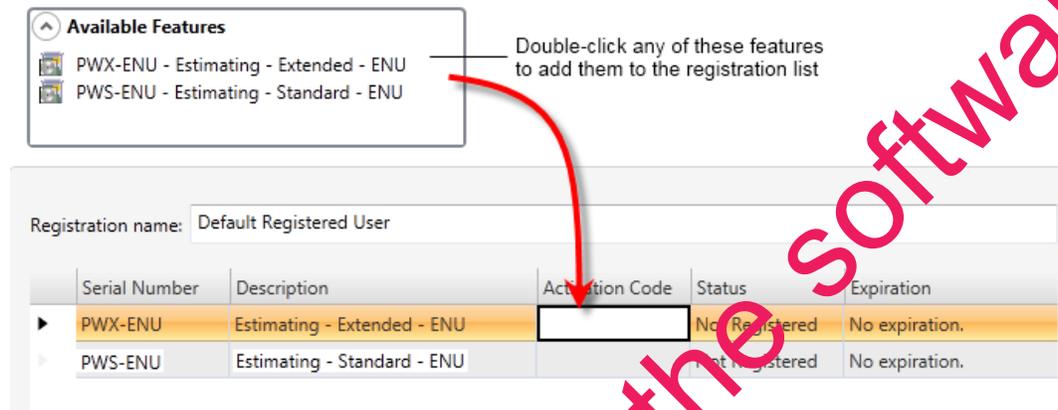
d In the **Activation Code** box of the registration list, type the activation code from the original shipment's packing slip.

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

- **DEMO**: Operates the software feature in demonstration mode.

- **LM**: Registers the software feature separately using License Manager.

See "H. Set Up License Manager (optional)" on page 19 for more information about setting up License Manager.

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

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

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

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

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

◻ If the Configuration wizard does not find a preexisting estimate database in the specified SQL Server instance, it prompts you to create one. Type a name for the new estimate database at the prompt.

◻ If you are storing existing Sage Estimating data from a previous release (version 11.1 or later) on the selected instance, the Estimating Management Console identifies the data for upgrade. Click [**Upgrade**] then follow the prompts to upgrade your data.

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

E. Migrate Your Data (optional)

If you have existing Pervasive-based estimate data, you can migrate your data to the current Sage Estimating version. You can perform this process from any computer that has access to the SQL Server instance or instances where you plan to store your estimate data. See "Chapter 4—Data Migration" for instructions.

F. Set Up Roles and Permissions

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

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

Setting up roles and permissions involves three general steps:

■ Create roles and assign permissions to them.

■ Set up a list of authorized Sage Estimating operators.

■ Assign operators to roles.

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

Create roles and assign permissions to them

1 Start the Estimating Management Console.

◻ **For Windows 7:** Click **Start** > **Programs** > **Sage** > **Estimating 16.11** > **Estimating Management Console**.

◻ **For Windows 8.1 or Windows 10:** Click the **Estimating Management Console** tile from the Start menu, or right-click outside the tile area, and then click **All apps** > **Sage** > **Estimating Management Console**.

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

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

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

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

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

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

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

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

Set up an operator list

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

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

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

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

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

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

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

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

Assign an operator to a role

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

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

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

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

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

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

G. Set Up Firewall Exceptions

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

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

H. Set Up License Manager (optional)

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

Use the instructions in this section to install License Manager.

Guidelines

Note that:

- All license-managed servers and workstations must use the same network protocol (TCP/IP).

- You cannot install License Manager to a terminal server. If you have a terminal server, install to a workstation.

- If you use firewall software on your license server, you may not be able to use the WlmAdmin or WCommute applications to view or check out licenses. To resolve this issue, discuss the server's firewall security with your network administrator. If you are willing to adjust your firewall security settings on the license manager server, consider granting access to the **lservnt.exe** file.

- Check in any licenses before upgrading.

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

Install the Sentinel driver

The Sage Estimating installation program automatically installs a Sentinel driver if you do not have one. However, if you need instructions to install the Sentinel driver manually, visit www.sagecre.com and click [Customer Support]. After you have logged on, in the **Knowledgebase Search** box, type How do I install the Sentinel driver? See "Technical Assistance" on page 3 for more information about using the Technical Support Knowledgebase.

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

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

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

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

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

Install License Manager

If you already have License Manager installed, start with <u>"Upgrade License Manager" on page 21</u>.

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

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

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

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

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

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

Install license codes

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

To install license codes:

1 Check in Windows Services to ensure that the Sentinel License Manager service is running.

- ◘ **In Windows 7:** Click **Start** > **Control Panel** > **System and Security** > **Administrative Tools** > **Services**.

- ◘ **In Windows 8.1 or Windows 10:** Click **Start** > **All apps** > **Windows System** > **Control Panel** > **System and Security** > **Administrative Tools** > **Services**.

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

2   On the License Manager server:

- **In Windows 7:** Click **Start**] > **All Programs** > **Accessories** > **Run**.

- **In Windows 8.1 and Windows 10:** Click **Start** > **All apps** > **Run**.

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

4   Install license codes using one of the following methods.

- **To enter license codes from a file:** In the **WlmAdmin** window, right-click your server and select **Add Feature** > **From a File** > **To Server and Its File**. In the **Open** window, select your license file and click [**Open**]. This installs all license codes in the file.

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

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

Upgrade License Manager

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

1   Check in any licenses before upgrading.

2   Run **LoadLS.exe**, located in the folder where you installed the previous version of License Manager (typically, C:\Program Files\Rainbow Technologies\Sentinel\7x.x.xServer\English). Click [**Remove**], and then click [**OK**] to remove the Sentinel LM license manager.

3   Remove the previous License Manager version:

- **In Windows Windows 7:** Click **Start** > **Control Panel** > **Programs** > **Uninstall a Program**.

- **In Windows 8.1 or Windows 10:** Click **Start** > **All apps** > **Windows System** > **Control Panel** > **Programs** > **Uninstall a Program**.

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

4   Install the new version of License Manager. See "Install License Manager".

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

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

I. After You Complete Your Setup

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

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

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

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

J. Other Installation Scenarios

Terminal Server

Follow the steps for "Scenario 2 (Workgroup environment; estimating data shared from one workstation)", with these exceptions:

- Always use **Add or Remove Programs** to start an installation to a terminal server.

- If you use another server to host Sage Estimating databases, install only Sage Estimating products to the terminal server.

Chapter 4—Data Migration

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

> **NOTE:** You must be using Sage Estimating 9.6 or later to migrate your data.

Overview

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

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

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

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

Changes in the Database Structure

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

Figure 5: Comparison of Pervasive and SQL Server

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

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

Migrating Your Data

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

1 From the Estimating Management Console, click [Data Migration].

2 Select step 2—Settings in the Data Migration window.

3 Click SQL Server (left-hand pane) then select a destination Address Book and Estimate database for your migrated data.

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

4 Click Pervasive (left-hand pane).

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

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

5 Click [Options], and then:

   □ Select the Enable detailed logging check box if you want to generate detailed entries in the migration event log.

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

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

   □ Select the Allow non-administrators to view and edit migrated estimates check box if you want to make migrated estimates available to all users.

      Clear the Allow non-administrators to view and edit check box to prevent users other than administrators from viewing and editing the migrated estimates.

   NOTE: After migration, you can change which estimates users can view and edit in the Security section of the Estimating Management Console.

6 Click step 3—Select Databases.

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

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

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

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

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

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

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

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

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

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

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

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

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

Chapter 5—Configuring SQL Server

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

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 71213, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=76530.

Setting Up a SQL Server Instance for Use with Sage Estimating

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

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

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

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

Named Instance

Figure 6: Instance Configuration Settings
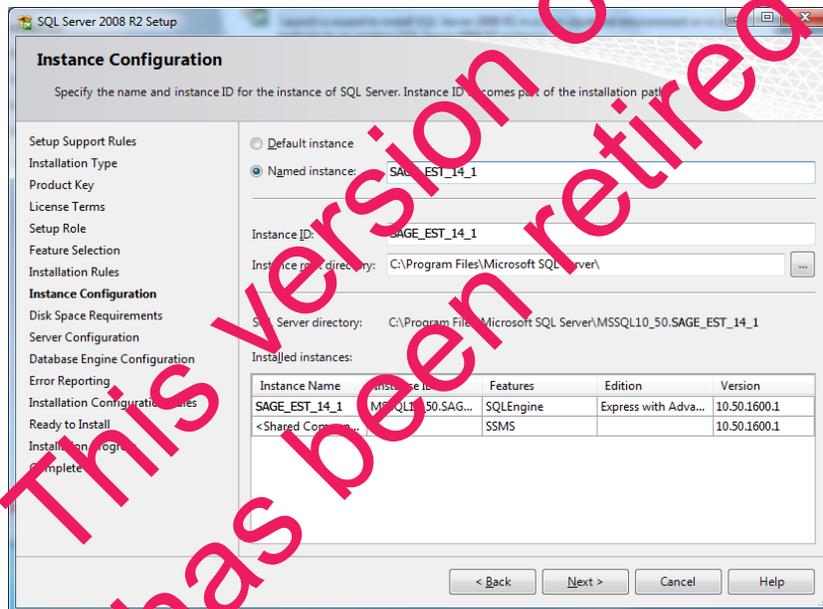
You must use a named instance. You can give the instance any name you want. However, if you have installed a previous version of Sage Estimating (such as version 11.2), give the new instance a different name that is easily recognizable (such as SAGE_EST_16_11).

Authentication Mode

Figure 7: Authentication Mode Settings
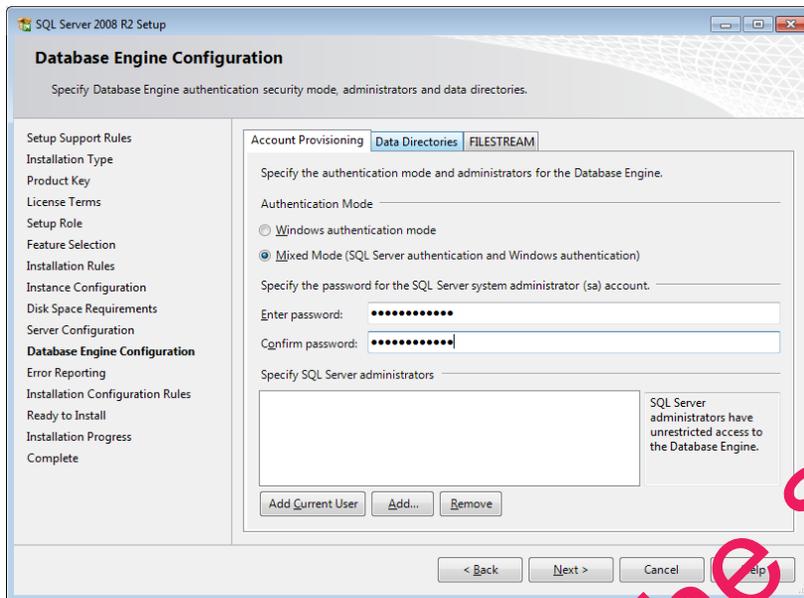
The instance must support **Mixed Mode** authentication (**Windows Authentication and SQL Server Authentication**). This means either Windows authentication or SQL Server authentication can be used to access the database information.

When you use Windows authentication, the operator requires permission to use SQL Server or be a member of a group that has permission. In Windows authentication mode, SQL Server validates the account name and password using information from the Windows operating system.

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

Collation Settings

Collation settings must be **Latin1_General**, **case-sensitive**, and **accent-sensitive** (**Latin1_General_CS_ AS**).

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

- Select the **Windows collation designator and sort order** option (instead of **SQL collation**, which is the default)

- **Latin1_General** (for the collation designator)

- **Case-sensitive**

- **Accent-sensitive**

- Clear all other options

Assigning Database Permissions

You use the **Security** feature in the Estimating Management Console to set up database permissions for SQL Server instances used with Sage Estimating.

For more information on setting up SQL Server security for Sage Estimating, see .

Setting the Firewall for Workgroups

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

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

Firewall Settings (Windows 7, Windows 8.1, and Windows 10)

1 Open Windows Firewall.

- **In Windows 7:** Click **Start** > **Control Panel** > **System and Security** > **Windows Firewall** > **Advanced Settings**.

- **Windows 8.1 or Windows 10:** Click **Start** > **Windows System** > **Control Panel** > **System and Security** > **Windows Firewall** > **Advanced Settings**.

2 Set rules for inbound and outbound TCP connections:

a Right-click **Inbound Rules**, and then select **New Rule**.

b In the **Inbound Rule** wizard, select **Port**, and then click [**Next**].

c Select **TCP**, and then select **Specific local ports**.

d In the **Specific local ports** box, type 8005, 49385, and then click [**Next**].

e Select **Allow the connection**, and then click [**Next**].

f Select the **Domain**, **Private**, and **Public** check boxes, and then click [**Next**].

g In the **Name** box, type **Sage Estimating Service** (or other appropriate name), and then click [**Finish**].

h Repeat steps a through g for outbound TCP connections, selecting **Outbound Rules** in step a.

3 Set rules for inbound and outbound UDP connections:

a Right-click **Inbound Rules**, and then select **New Rule**.

b In the **Inbound Rule** wizard, select **Port**, and then click [**Next**].

c Select **UDP**, and then select **Specific local ports**.

d In the **Specific local ports** box, type 1433, 1434, and then click [**Next**].

e Select **Allow the connection**, and then click [**Next**].

f Select the **Domain**, **Private**, and **Public** check boxes, and then click [**Next**].

g In the **Name** box, type **Sage Estimating Service** (or other appropriate name), and then click [**Finish**].

h Repeat steps a through g for outbound UDP connections, selecting **Outbound Rules** in step a.

Additional Recommendations

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

Memory

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

1 Right-click the SQL Server instance, and then select **Properties**.

2 In the Server Properties window, click **Memory** (left-hand pane).

3 Set the **Maximum server memory** amount to **4000** (or whatever limit you determine).

Communication Protocol

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

1 Start the SQL Server Configuration Manager.

▫ **In Windows 7:** Click **Start** > **All Programs** > **Microsoft SQL Server** > **Configuration Tools** > **SQL Server Configuration Manager**.

▫ **In Windows 8.1 or Windows 10:** Click **Start** > **All apps** > **Microsoft SQL Server** > **SQL Server Configuration Manager**.

2 In the left-hand pane of the **SQL Server Configuration Manager** window, click the arrow next to **SQL Server Network Configuration** to display all local SQL Server instances.

3 Select the instance associated with Sage Estimating (**SAGE_ESTIMATING**, by default).

4 In the right-hand pane right-click a communication protocol, and then select **Disable**.

5 Repeat step 4 for all communication protocols **except TCP/IP**. Leave this protocol **Enabled**.

6 In the left-hand pane of the **SQL Server Configuration Manager** window, click the arrow next to **SQL Native Client 10.0 Configuration**.

7 Click **Client Protocols** (left-hand pane).

8 In the right-hand pane right-click a communication protocol, and then select **Disable**.

9 Repeat step 8 for all communication protocols **except TCP/IP**. Leave this protocol **Enabled**.

10 Close the SQL Server Configuration Manager and restart the service.

Copying Databases from Other Instances

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

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

Figure 8: Copying Databases From One SQL Server Instance to Another
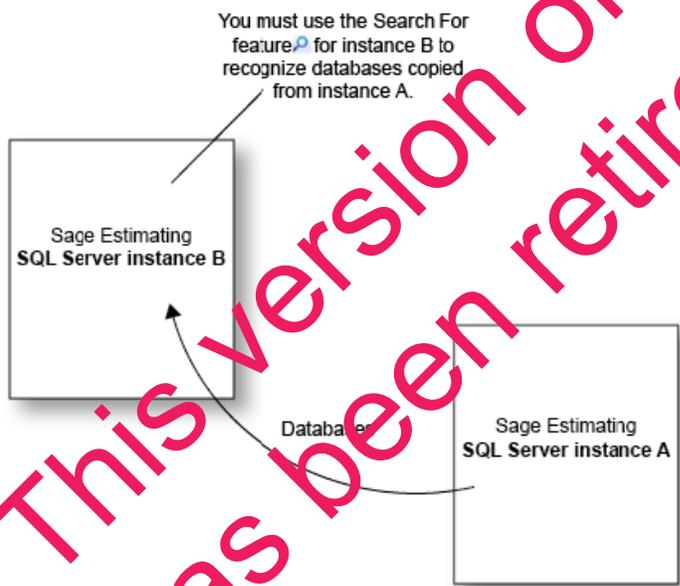
Any database you add to an instance must have the same Sage Estimating version as the other operating databases. For example, if you are using Sage Estimating 16.11, and you want to add a standard database from a previous Sage Estimating installation, upgrade the standard database to version 16.11 before adding it to the new instance. Refer to the Estimating Management Console in-product Help for instructions on using the **Search For** feature.

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

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