

Sage Fixed Assets

for Depreciation, Tracking, Planning, and Reporting

Installation 2013.1

Guide for Single Users



sage

Sage Fixed Assets

Installation Guide

Version 2013.1

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Chapter 1

Introduction

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

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

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

Supported Operating Environments

You can operate the Sage Fixed Assets programs in the following environments:

- Windows XP (Home and Professional Editions), 32-bit and 64-bit compatibility
- Windows Vista,[®] 32-bit and 64-bit compatibility
- Windows 7, 32-bit and 64-bit compatibility
- Windows 8, 32-bit and 64-bit compatibility

System Requirements

The requirements listed here are the *minimum* requirements. As is true of most software programs, enhancing your hardware and system software may improve performance.

Operating System	Windows XP (Professional or Home) with Service Pack 2 or 3 *; Windows Vista with Service Pack 2*; Windows 7 with Service Pack 1; Windows 8; 32-bit and 64-bit compatibility
Processor	1 GHz or higher recommended
Memory (RAM)	1 GB or higher; (Note: For Sage Fixed Assets - Reporting 1.5 GB is required.)
Screen Resolution	Sage Fixed Assets is optimized for 1024 x 768 viewing resolution.
Free Disk Space	500 MB for the Sage Fixed Assets application; 2 GB required for full install with Sage Fixed Assets - Reporting (if applicable)

* We have tested the application with the Service Packs listed here. We will continue to test Service Packs as they are released to ensure that you can use the latest Service Pack with the application.

Security Requirements

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

Installation

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

Chapter 2

Installing Sage Fixed Assets - Depreciation the First Time

In this chapter:

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This chapter provides instructions for users who have never installed Sage Fixed Assets - Depreciation before. If you are currently using Sage Fixed Assets - Depreciation, please see [Chapter 3, "Installing Sage Fixed Assets - Depreciation: Upgrading from a Prior Version."](#)

Overview of the Install Process

The install process consists of the following steps:

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

Step 1: Installing the Latest Version

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

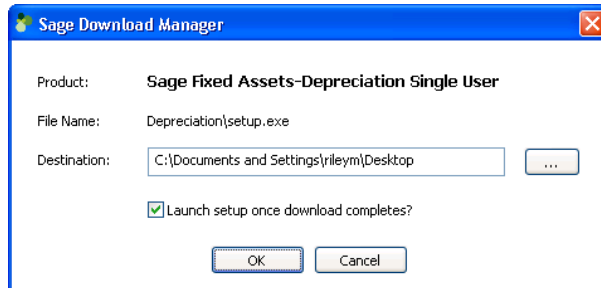
- Close all other Windows programs.
- Close all tool bars on your computer's desktop (such as the Microsoft Office tool bar).
- Close all programs that run in the background after you start your computer (such as virus-checking programs).
- Make sure you have **Administrative rights** to the local computer.

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

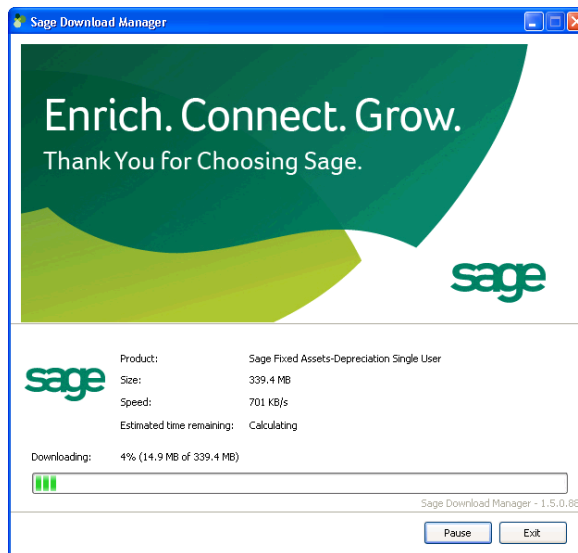
To start the install program

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

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

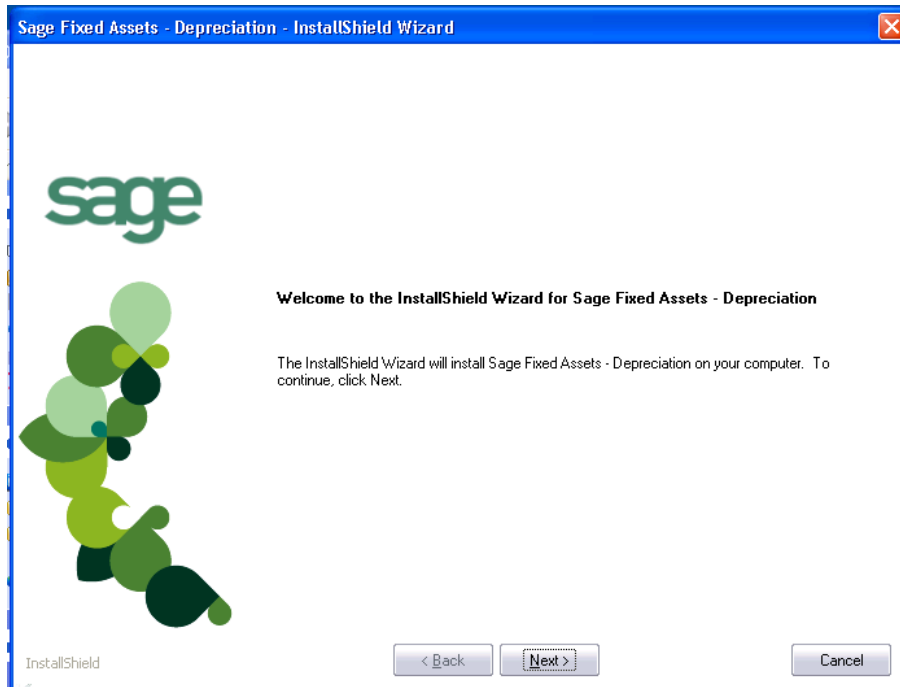


6. Click OK. The system begins to download the file.

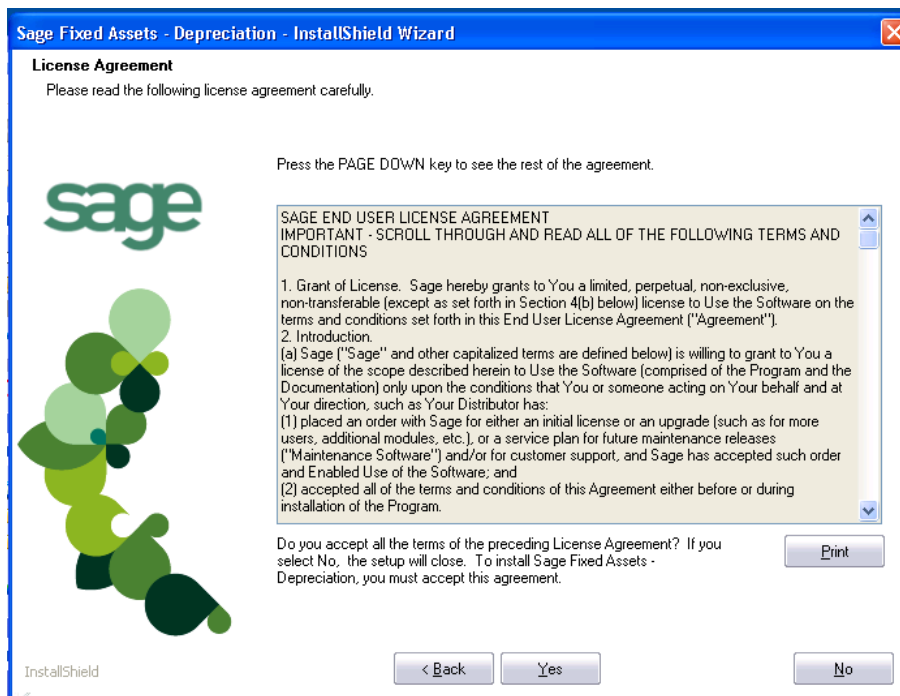


The system prompts you to install Sage Advisor Update.

7. Click the Install button. The system installs Sage Advisor Update. A message indicates that you must install Microsoft .NET Framework if it is not already installed.
8. Click the Install button. The system installs Microsoft .NET Framework and then displays the Welcome dialog. (You may need to restart your machine.)



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

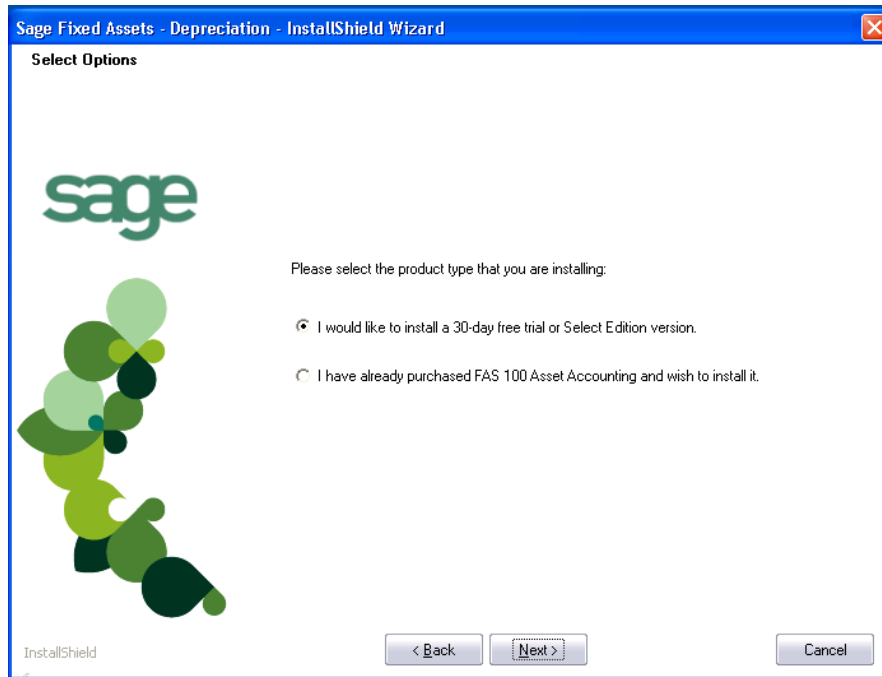


■ **Print Button**

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

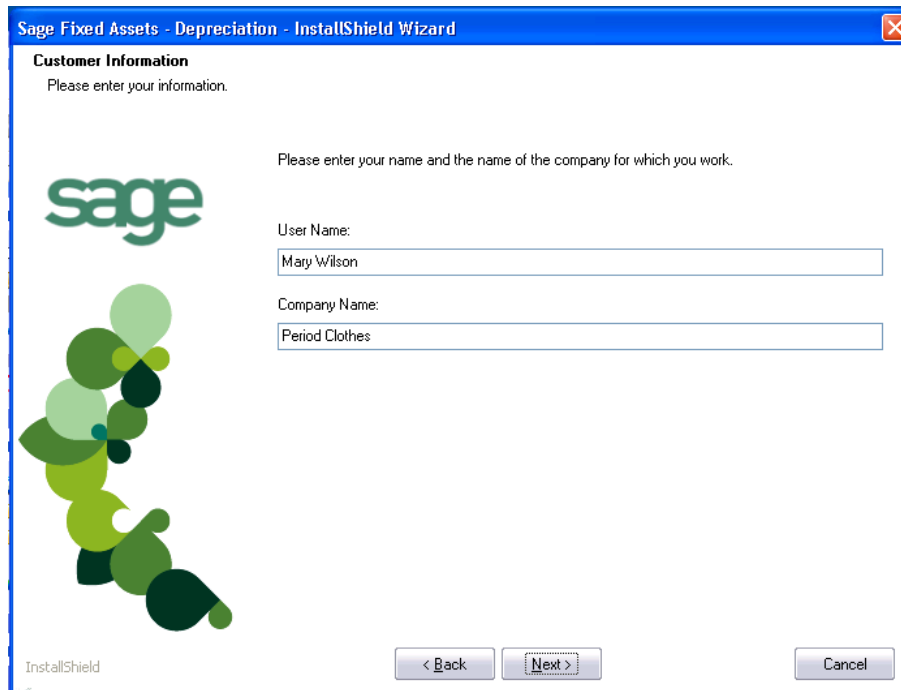
10. Read the license agreement, and then click the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, click the No button. The system exits from the installation program.)

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



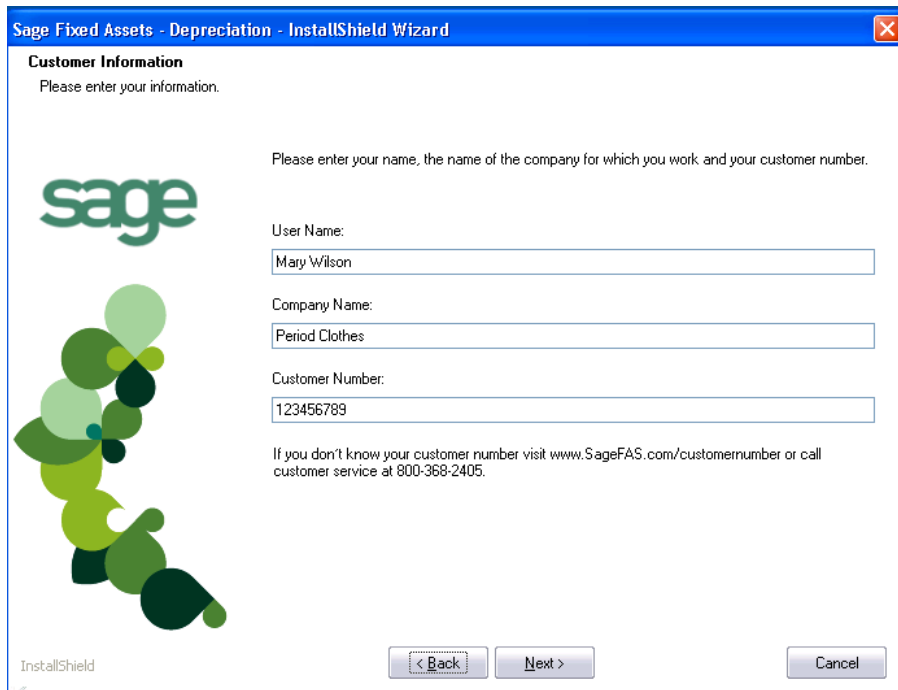
12. Select either the 30-day free trial option or the purchased option.

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



13. Enter your name and company name, and continue to step 9.

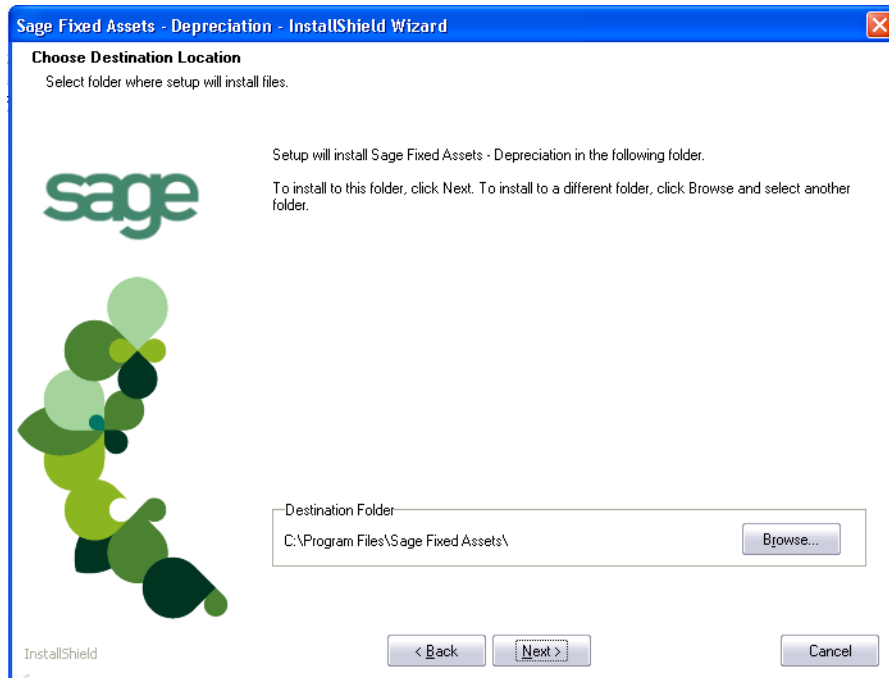
If you selected the purchased option, the following Customer Information dialog appears.



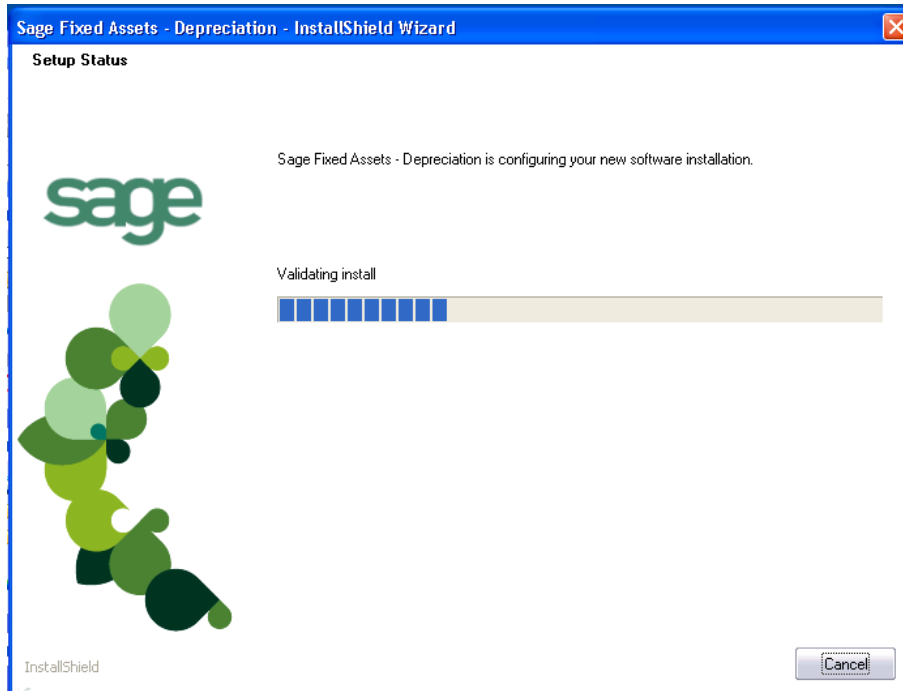
14. Enter your name, company name, and customer number. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

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

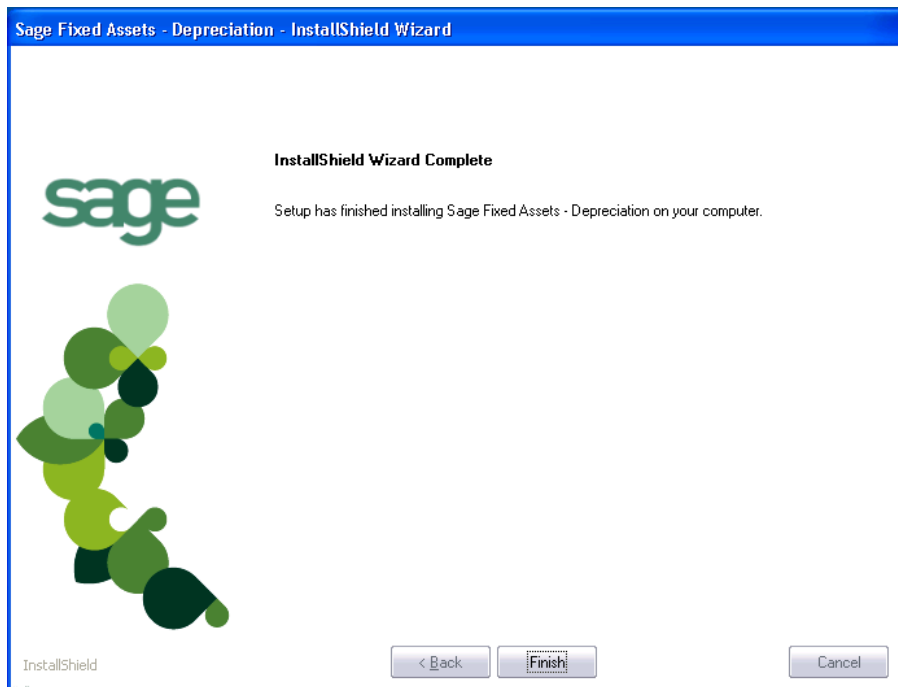
15. Click the Next button. The Choose Destination Location dialog appears.



16. 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.

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

Step 2: Registering the Application

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

Note: You have 30 days to register the application.

To register the application

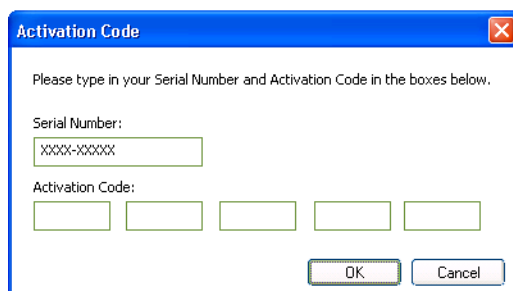
1. Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
2. Select the Sage Fixed Assets program group.
3. Select the Depreciation icon. A message appears indicating you can use the application for 30 days.



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



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



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

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

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



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

Step 3: Starting the Application

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

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

To start the application

Starting the purchased version:

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

The system opens the application and displays the main window.

Starting the free trial version:

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



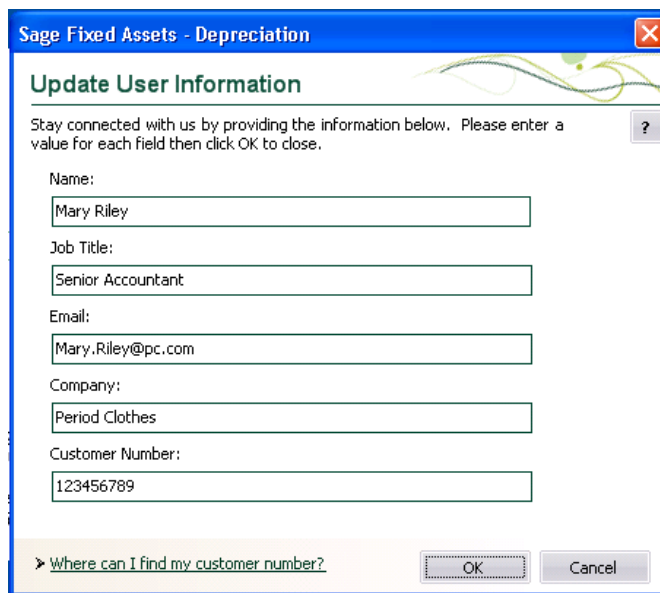
4. Click the Register Later button.

The system opens the application and displays the main window.

To update your customer number

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

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

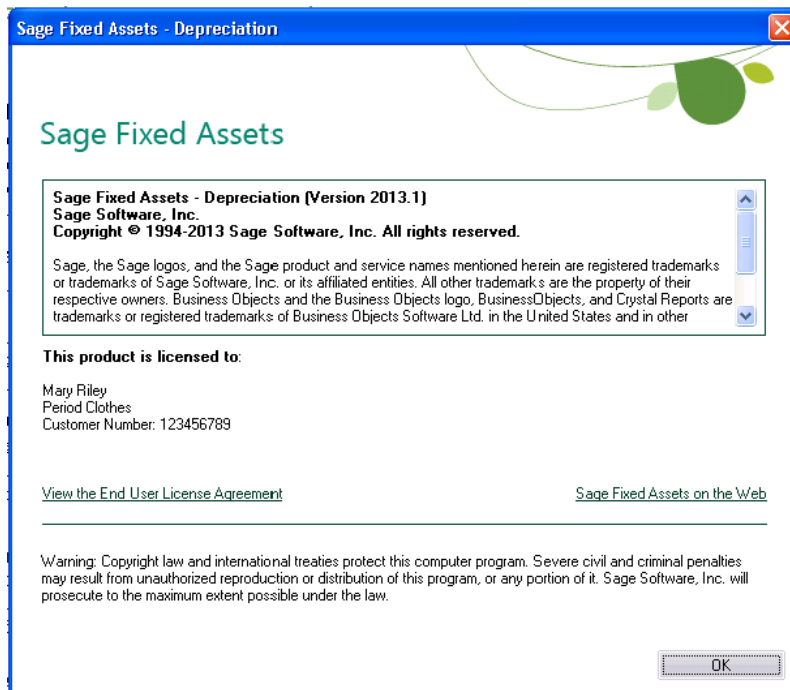


2. Enter your name, company name, and customer number, and then click OK.

To view your customer number

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

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



Chapter 3

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

In this chapter:

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Step 1: Backing Up Your Data	3-2
Step 2: Installing the Latest Version	3-2
Step 3: Converting Your Data	3-7
Step 4: Starting the Application	3-13

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

Previous Versions Compatible with the Latest Version

The table below shows the version you must be currently using of Sage Fixed Assets - Depreciation to follow the steps in this chapter. If you are not running the version shown in the table, you will need to install prior releases in sequential order through the compatible version before you upgrade.

Product	Compatible Versions
Sage Fixed Assets	2012.1 and later
Sage Fixed Assets Canadian Edition	2012.1 and later
Sage Fixed Assets Government or Nonprofit Edition	2013.0

Note: Sage Fixed Assets - Reporting uses Crystal Reports XI, which was shipped with Sage Fixed Assets versions 2008.2 and later. If you installed Sage Fixed Assets - Reporting with Sage Fixed Assets version 2008.2 or later, you do not need to install it again.

Overview of the Upgrade Process

The upgrade process consists of the following steps:

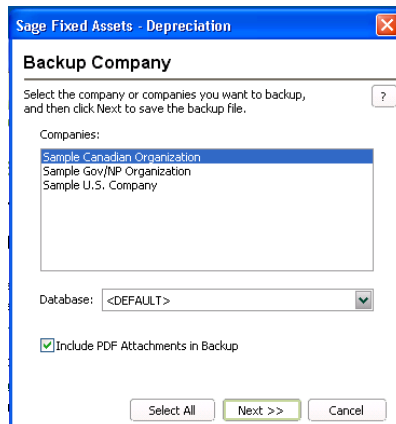
1. Backing up your current data, [page 3-2](#).
2. Installing the latest version, [page 3-2](#).
3. Converting your current data, [page 3-7](#).
4. Starting the application, [page 3-13](#).

Step 1: Backing Up Your Data

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

To back up your database

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



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

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

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

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

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

Step 2: Installing the Latest Version

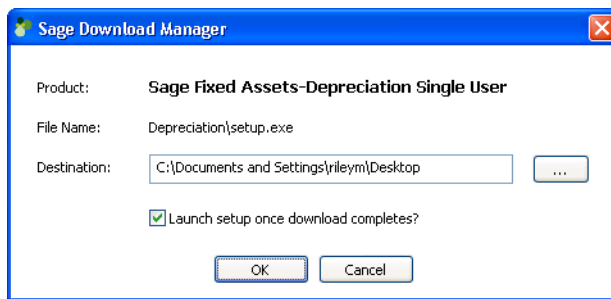
Before you begin to install the application, you should do the following:

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

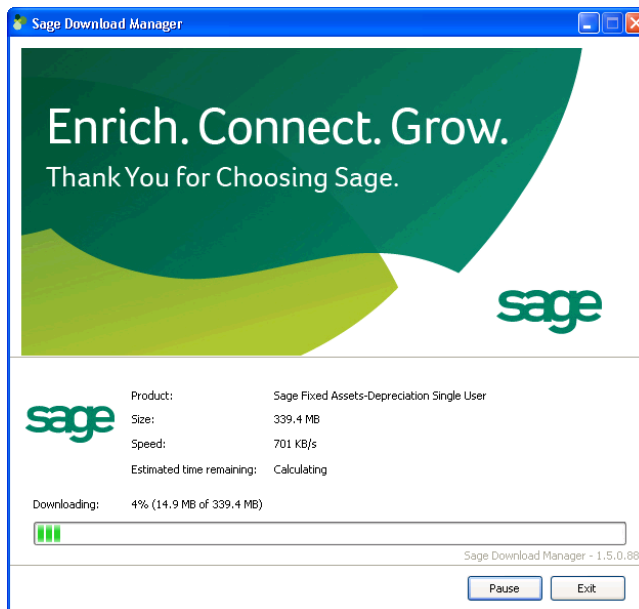
When installing the application, we recommend you accept the default options and directory locations the installation program provides. However, you can customize the installation to suit your needs by choosing the components you want to install.

To start the install program

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



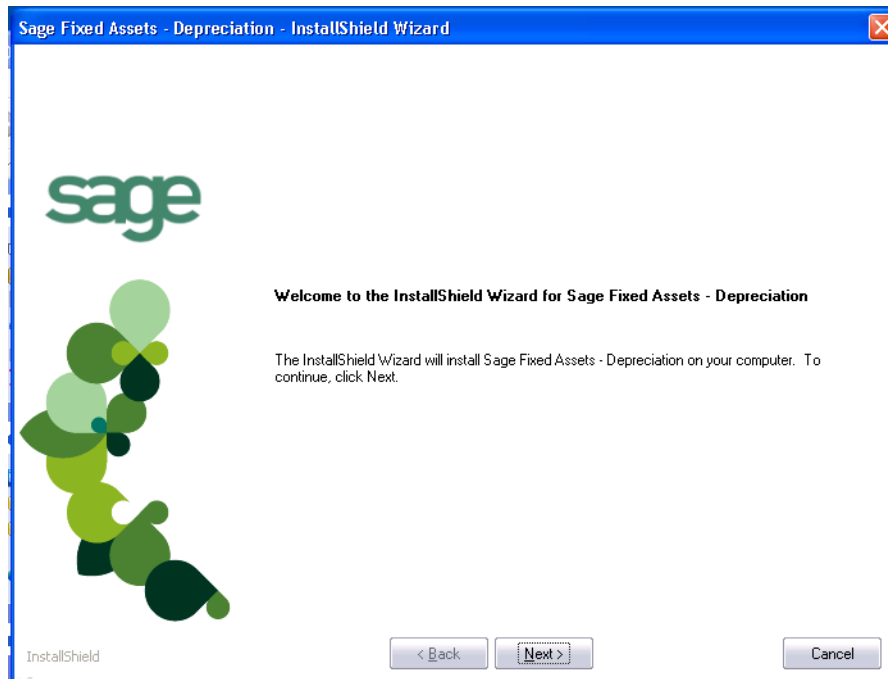
6. Click OK. The system begins to download the file.



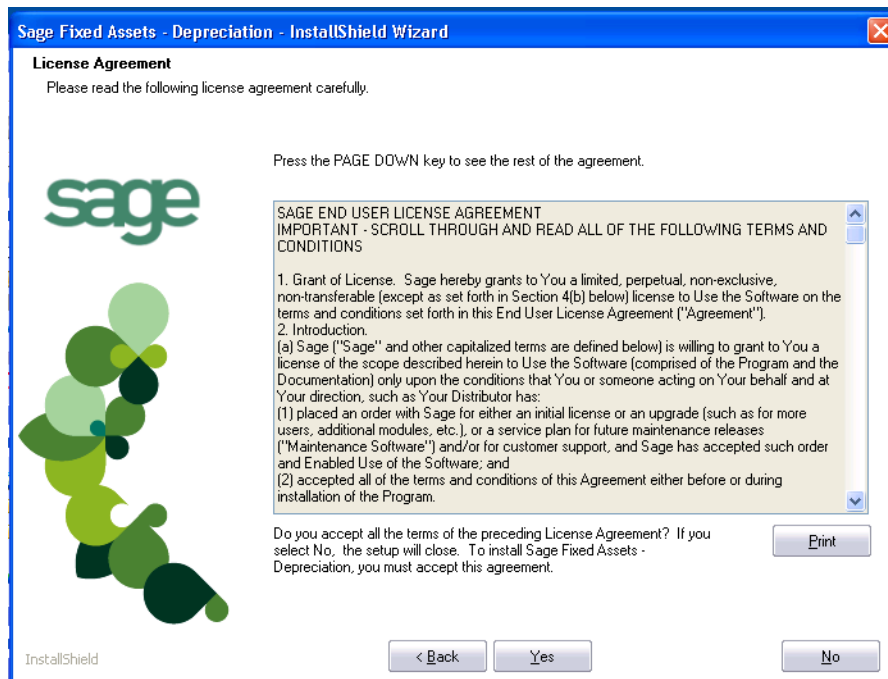
The system prompts you to install Sage Advisor Update if it is not already installed.

7. Click the Install button. The system installs Sage Advisor Update. A message indicates that you must install Microsoft .NET Framework if it is not already installed.

8. Click the Install button. The system installs Microsoft .NET Framework and then displays the Welcome dialog. (You may need to restart your machine.)



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



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

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

The screenshot shows a dialog box titled "Sage Fixed Assets - Depreciation - InstallShield Wizard". The main heading is "Customer Information" with the instruction "Please enter your information." Below this is the Sage logo and a decorative graphic of green circles. The text reads: "Please enter your name, the name of the company for which you work and your customer number." There are three input fields: "User Name:" containing "Mary Wilson", "Company Name:" containing "Period Clothes", and "Customer Number:" containing "123456789". Below the fields is a note: "If you don't know your customer number visit www.SageFAS.com/customernumber or call customer service at 800-368-2405." At the bottom are three buttons: "< Back", "Next >", and "Cancel".

12. 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.

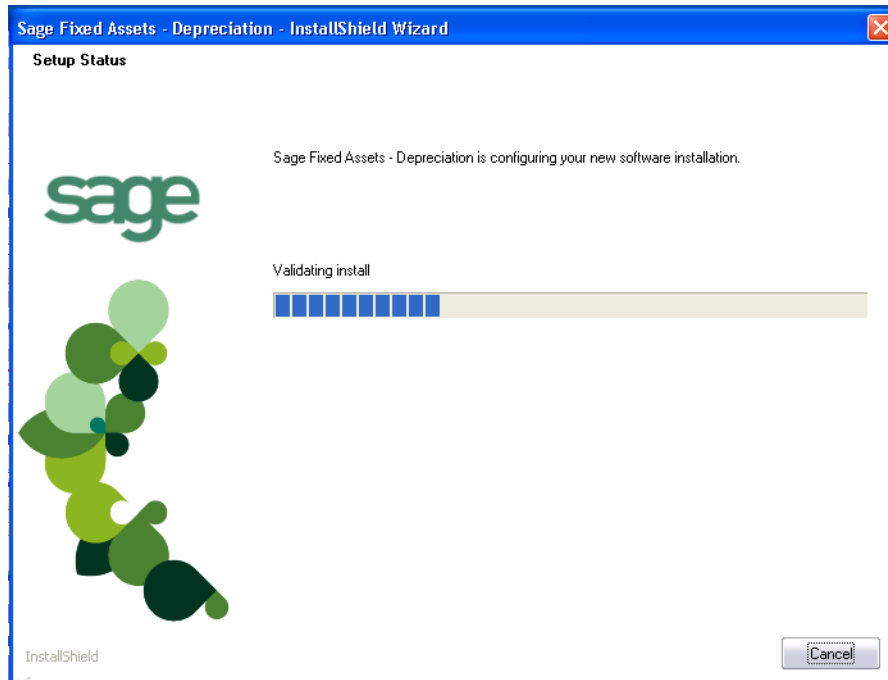
Note: You can find the customer number on the packing slip in the upgrade package or by clicking About Depreciation from the Help menu. If you cannot find your customer number, call Customer Service at 800-368-2405.

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

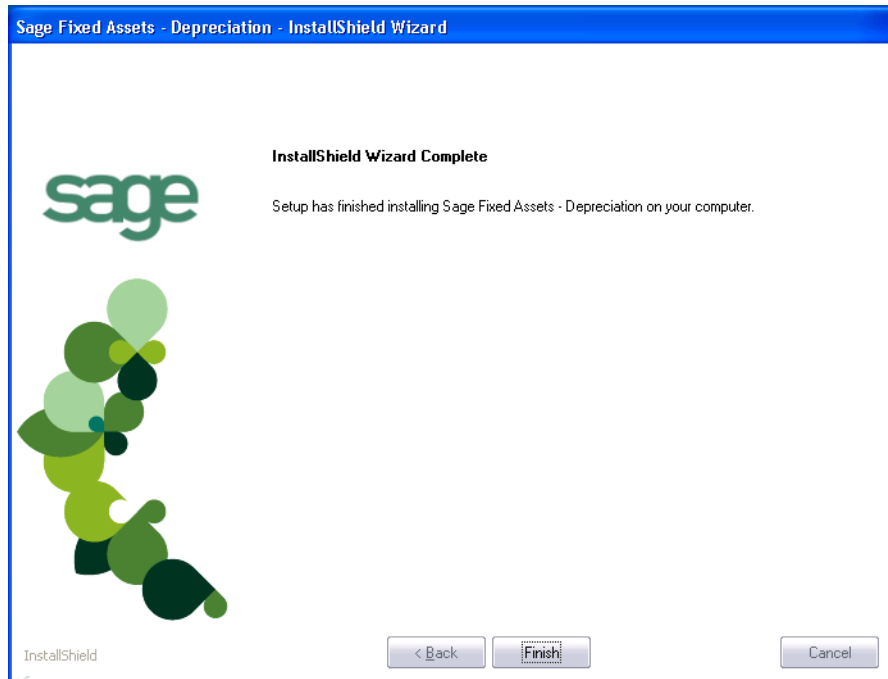
The screenshot shows a dialog box titled "Sage Fixed Assets - Depreciation". It features a question mark icon and the following text: "The installation has detected a prior version and will remove the prior version from your computer. No asset data will be lost; however, before using the program you will be required to convert your data." Below this, it lists tasks to complete before continuing: "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.)" 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." At the bottom, it asks "Would you like to continue?" with "Yes" and "No" buttons.

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

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



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



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

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

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

Step 3: Converting Your Data

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

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

You have two options for converting your databases.

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

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

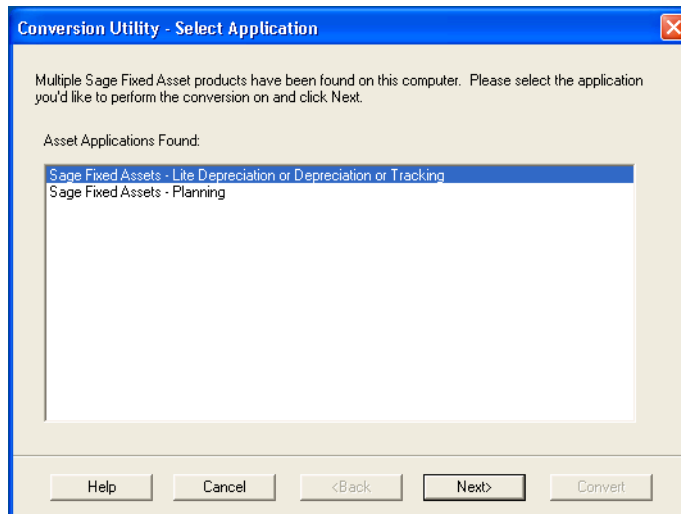
Converting a database is a time-consuming process. Please refer to the table below, which outlines the recommended conversion procedure:

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

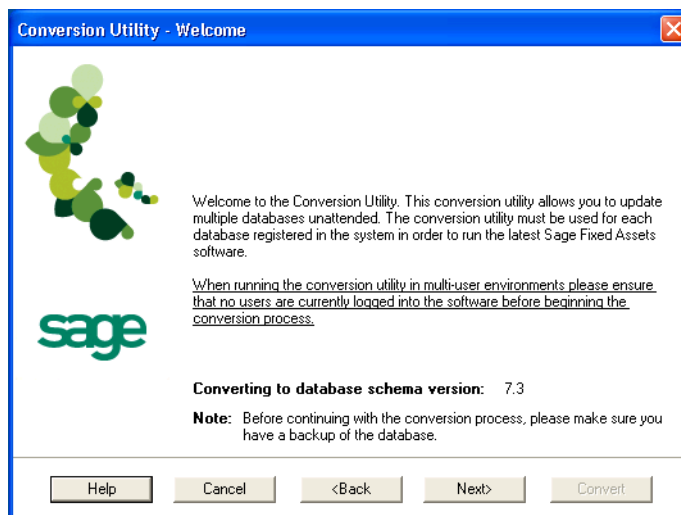
To use the Database Conversion Utility to convert databases

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

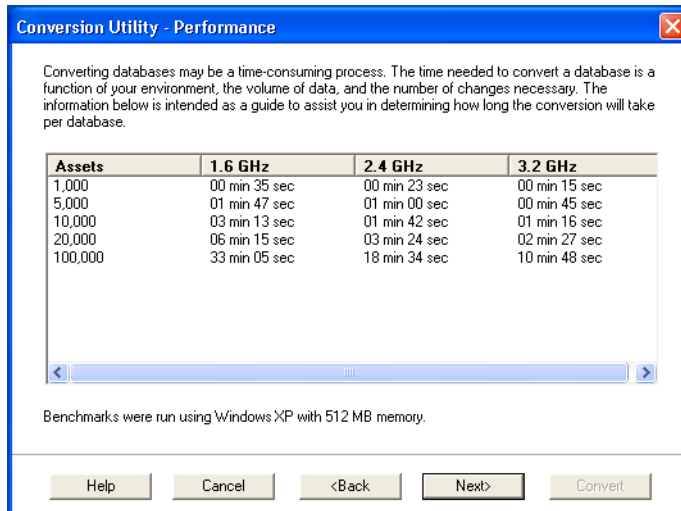
If more than one Sage Fixed Assets program is installed on your machine, the Conversion Utility Select Application dialog appears.



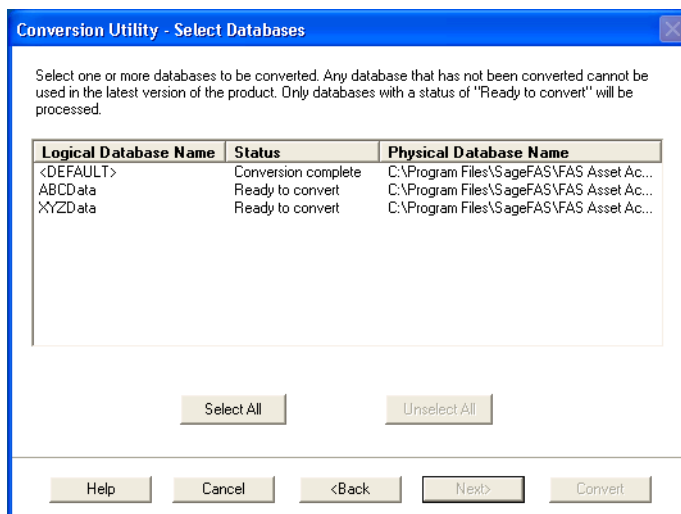
5. Select the Sage Fixed Assets program containing the database that you want to convert.
6. Click the Next button. The Conversion Utility Welcome dialog appears.



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



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



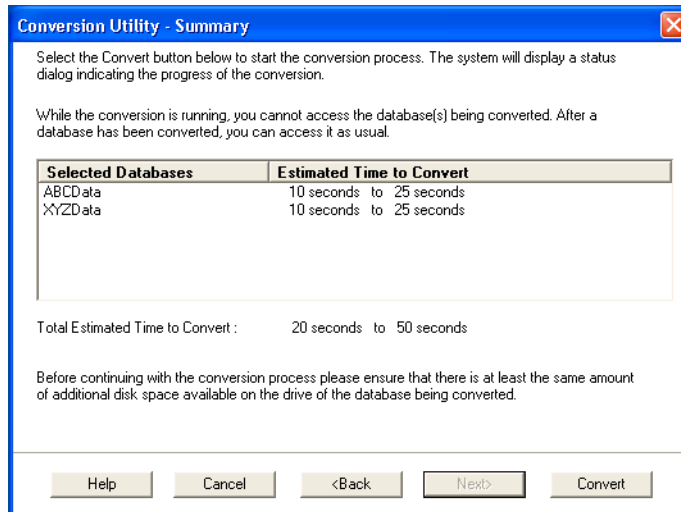
This dialog displays the status of each database.

- **Conversion Complete**
 This status indicates that the database has already been converted to the latest version.
- **Ready to Convert**
 This status indicates that the database is ready to be converted to the latest version.
- **Incompatible Version**
 This status indicates that the database cannot be converted because the database version is incompatible with the latest version of the application. For information about which versions are compatible with the latest version of the application, see [“Previous Versions Compatible with the Latest Version,”](#) page 3-1. For assistance in converting your databases, please contact Sage Fixed Assets Customer Support.

■ **Cannot Open**

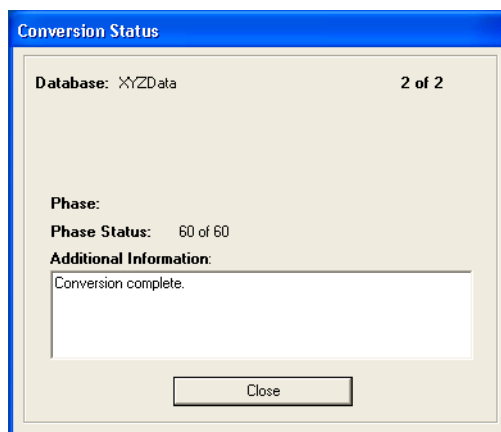
This status indicates that the database cannot be converted for an unknown reason. The database may have been moved and the system cannot locate it, or the database may be corrupted. For assistance in resolving the problem, please contact Sage Fixed Assets Customer Support.

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



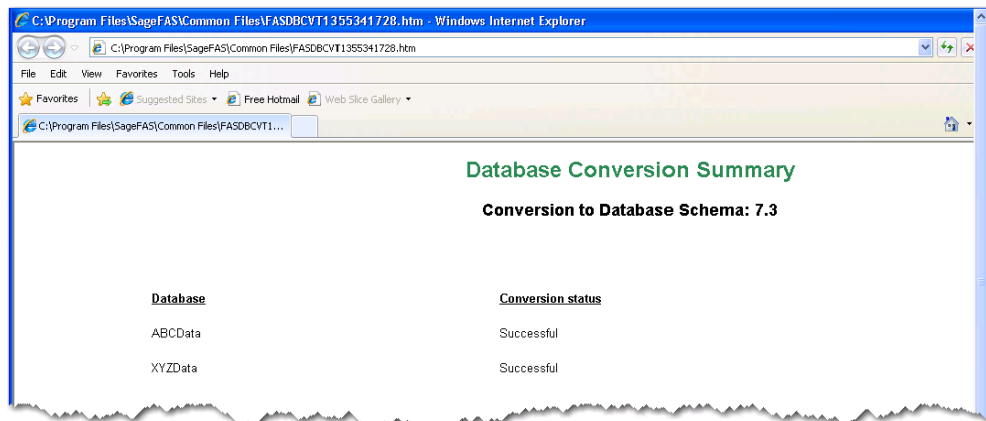
11. Review the Conversion Utility Summary dialog, and then click the Convert button.

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



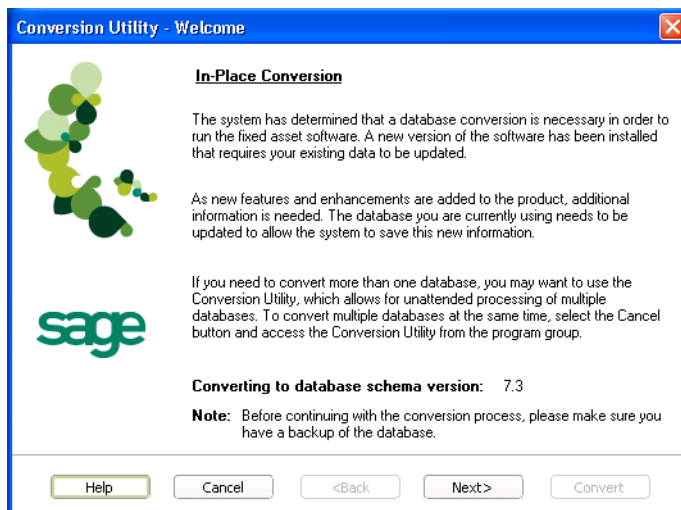
When the conversion is complete, a "Conversion Complete" message appears in the Additional Information text box.

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

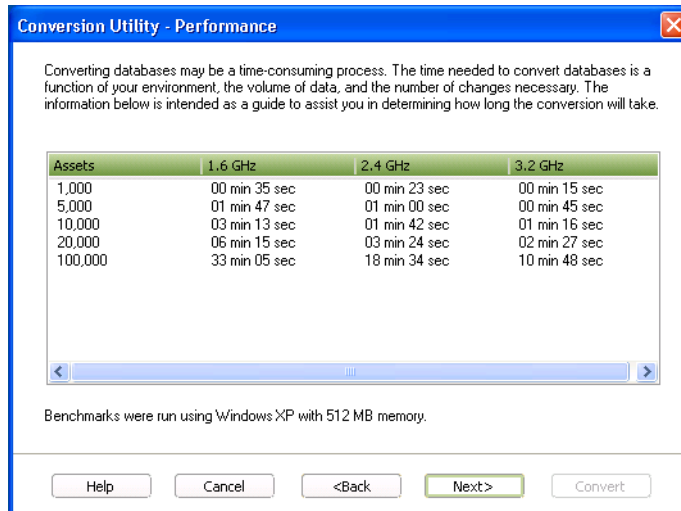


To perform an in-place database conversion

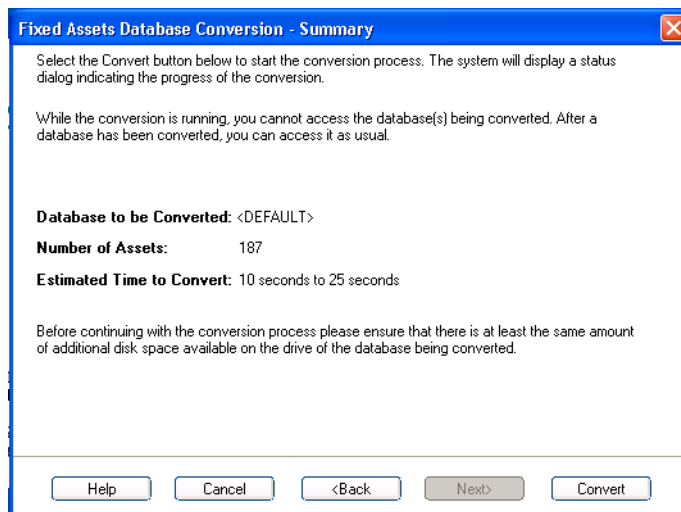
- Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
- Select the Sage Fixed Assets program group.
- Select the Depreciation icon. The application attempts to open a database that must be converted. The Conversion Utility Welcome dialog appears.



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

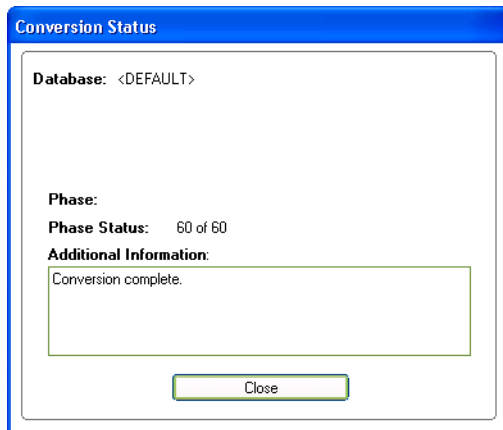


5. Review the Conversion Utility Performance dialog to estimate how long the database conversion will take.
6. Click the Next button. The Conversion Utility Summary dialog appears.



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

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



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

Step 4: Starting the Application

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

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

To start the application

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

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

To update your customer number

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

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

The screenshot shows a dialog box titled "Sage Fixed Assets - Depreciation" with the subtitle "Update User Information". The main text reads: "Stay connected with us by providing the information below. Please enter a value for each field then click OK to close." Below this are five text input fields: "Name:" (Mary Riley), "Job Title:" (Senior Accountant), "Email:" (Mary.Riley@pc.com), "Company:" (Period Clothes), and "Customer Number:" (123456789). At the bottom left, there is a link: "Where can I find my customer number?". At the bottom right, there are "OK" and "Cancel" buttons.

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.

The screenshot shows a dialog box titled "Sage Fixed Assets - Depreciation" with the subtitle "Sage Fixed Assets". The main content includes: "Sage Fixed Assets - Depreciation (Version 2013.1)", "Sage Software, Inc.", "Copyright © 1994-2013 Sage Software, Inc. All rights reserved.", a paragraph of legal disclaimer text, "This product is licensed to:", "Mary Riley", "Period Clothes", "Customer Number: 123456789", a link "View the End User License Agreement", and a link "Sage Fixed Assets on the Web". At the bottom right, there is an "OK" button.

Chapter 4

Installing Sage Fixed Assets - Tracking the First Time

In this chapter:

Overview of the Install Process	4-1
Step 1: Attaching Your Physical Reader	4-1
Step 2: Installing the Latest Version	4-1
Step 3: Installing the Barcode Reader Program	4-7
Step 4: Registering the Application	4-10
Step 5: Starting the Application	4-12

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

Overview of the Install Process

The install process consists of the following steps:

1. Attaching your physical reader, [page 4-1](#).
2. Installing the latest version, [page 4-1](#).
3. Installing the Barcode Reader program, [page 4-7](#).
4. Registering the application, [page 4-10](#).
5. Starting the program, [page 4-12](#).

Step 1: Attaching Your Physical Reader

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

Step 2: Installing the Latest Version

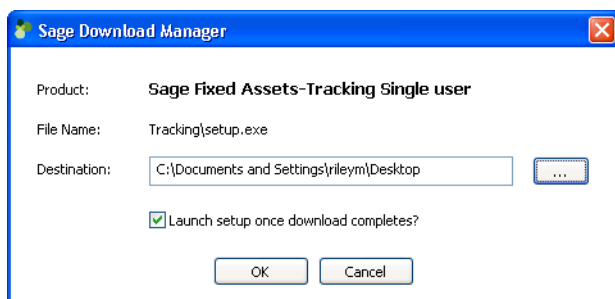
Before you begin to install the application, you should do the following:

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

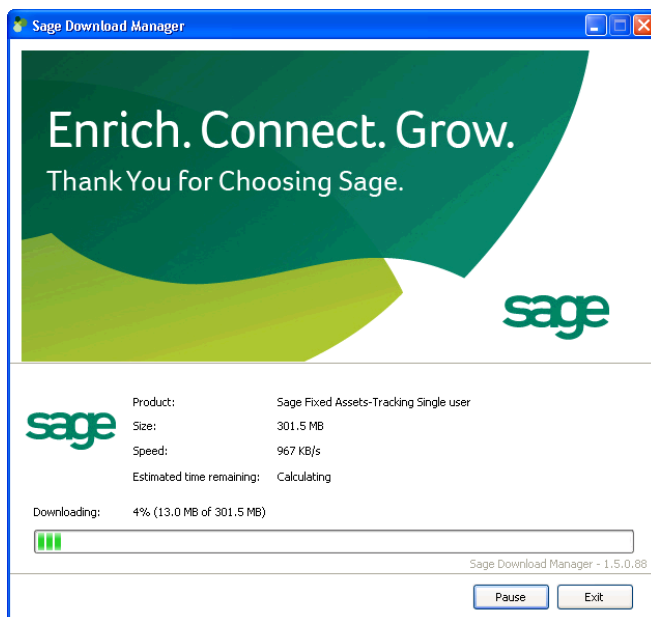
When installing the application, we recommend you accept the default options and directory locations the installation program provides. However, you can customize the installation to suit your needs by choosing the components you want to install.

To start the install program

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



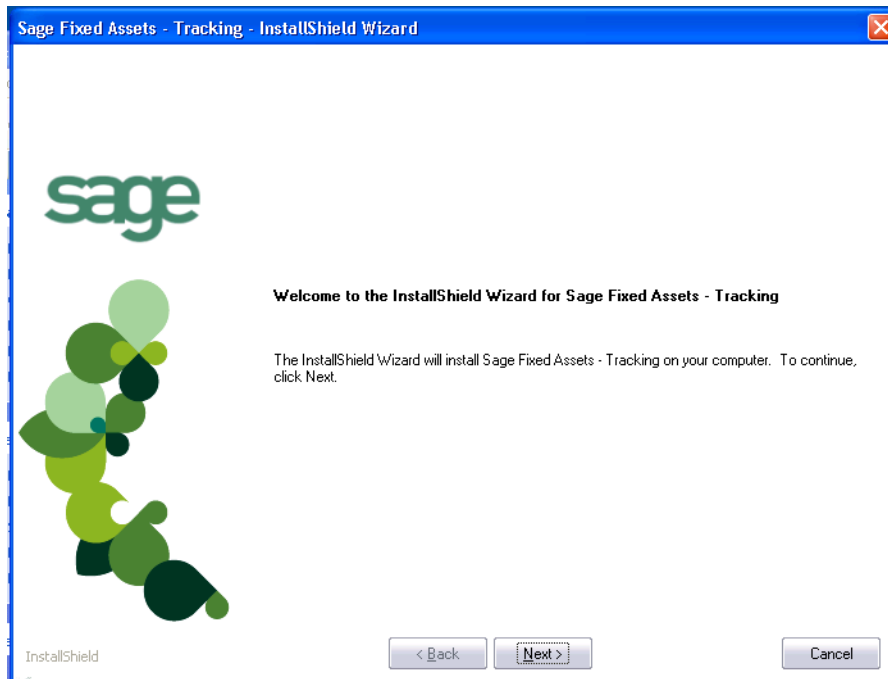
6. Click OK. The system begins to download the file.



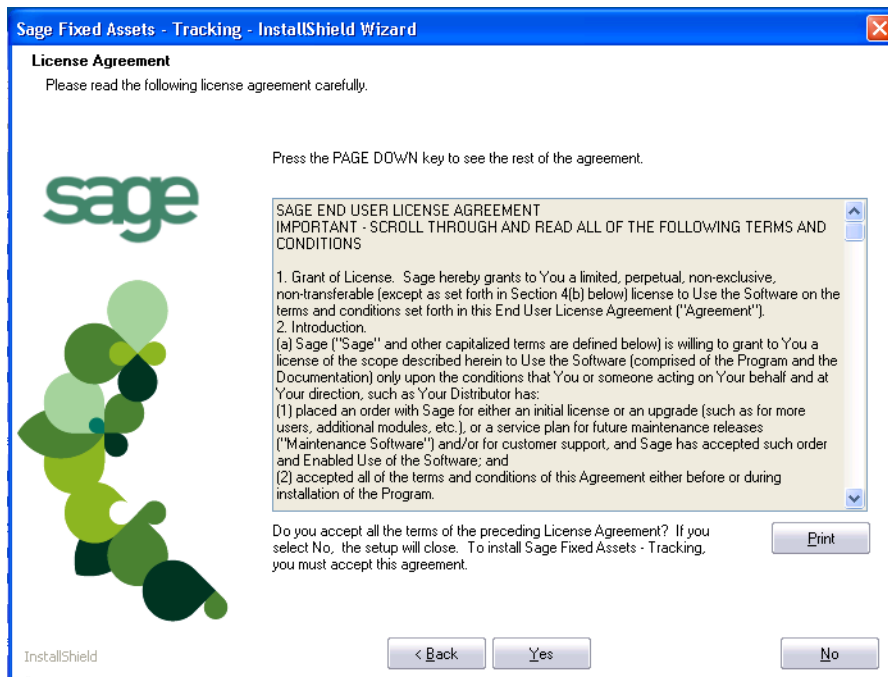
The system prompts you to install Sage Advisor Update if it is not already installed.

7. Click the Install button. The system installs Sage Advisor Update. A message indicates that you must install Microsoft .NET Framework if it is not already installed.

- Click the Install button. The system installs Microsoft .NET Framework and then displays the Welcome dialog. (You may need to restart your machine.)



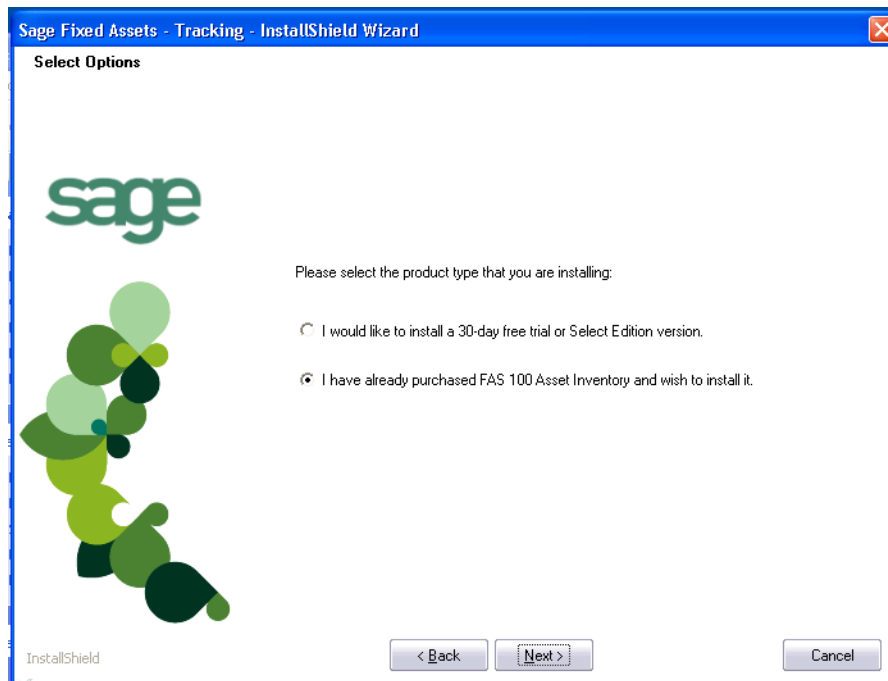
- Click the Next button. The Software License Agreement dialog appears.



■ **Print Button**

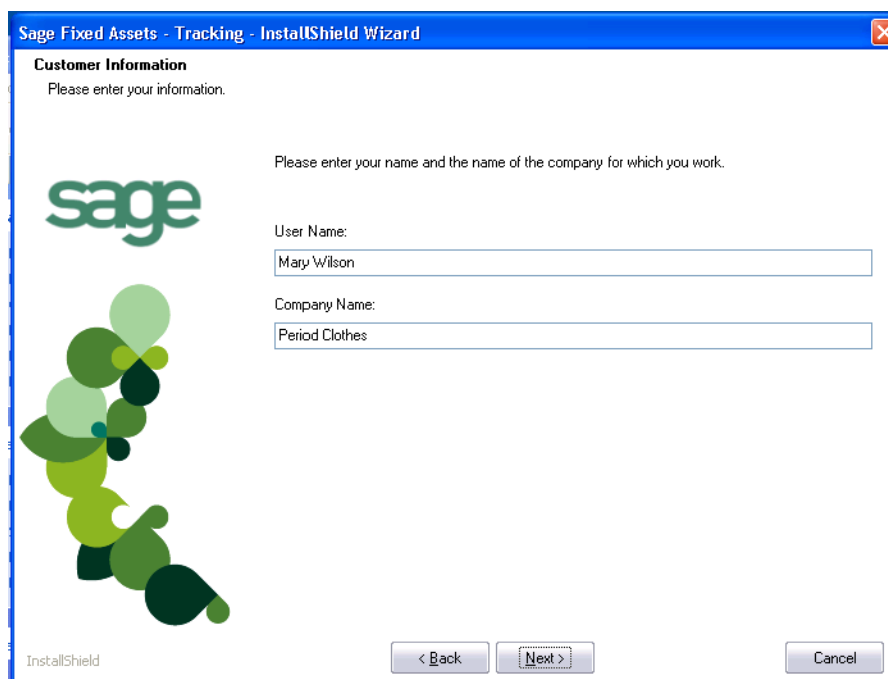
Click this button to send the license agreement to the default printer.

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



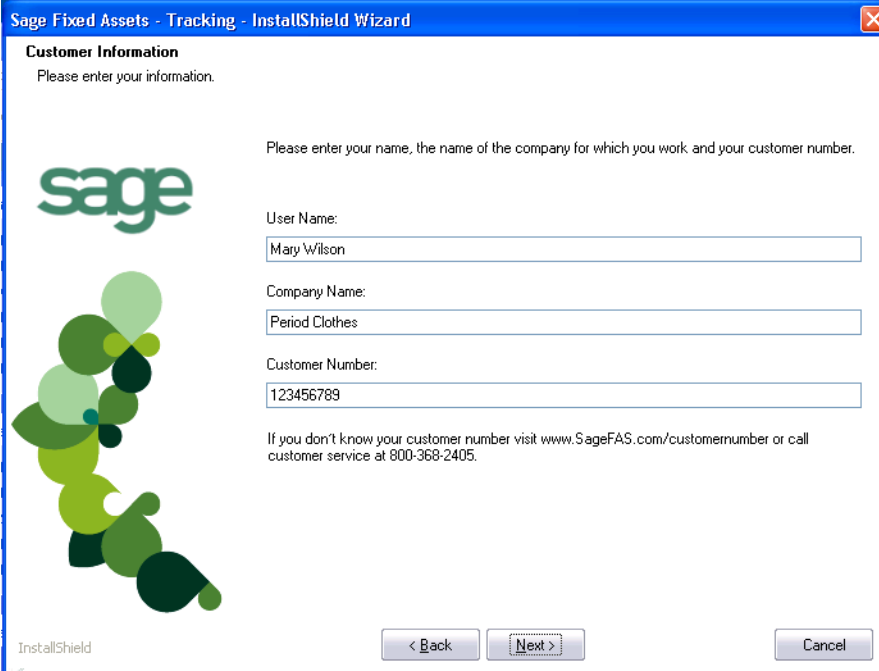
12. Select either the 30-day free trial option or the purchased option.

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



13. Enter your name and company name, and continue to step 9.

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



The screenshot shows a dialog box titled "Sage Fixed Assets - Tracking - InstallShield Wizard". The main heading is "Customer Information" with the instruction "Please enter your information." Below this is the Sage logo and a decorative graphic of green circles. The text "Please enter your name, the name of the company for which you work and your customer number." is displayed above three input fields: "User Name:" (containing "Mary Wilson"), "Company Name:" (containing "Period Clothes"), and "Customer Number:" (containing "123456789"). A note at the bottom states: "If you don't know your customer number visit www.SageFAS.com/customernumber or call customer service at 800-368-2405." At the bottom of the dialog are three buttons: "< Back", "Next >" (highlighted with a dashed border), and "Cancel".

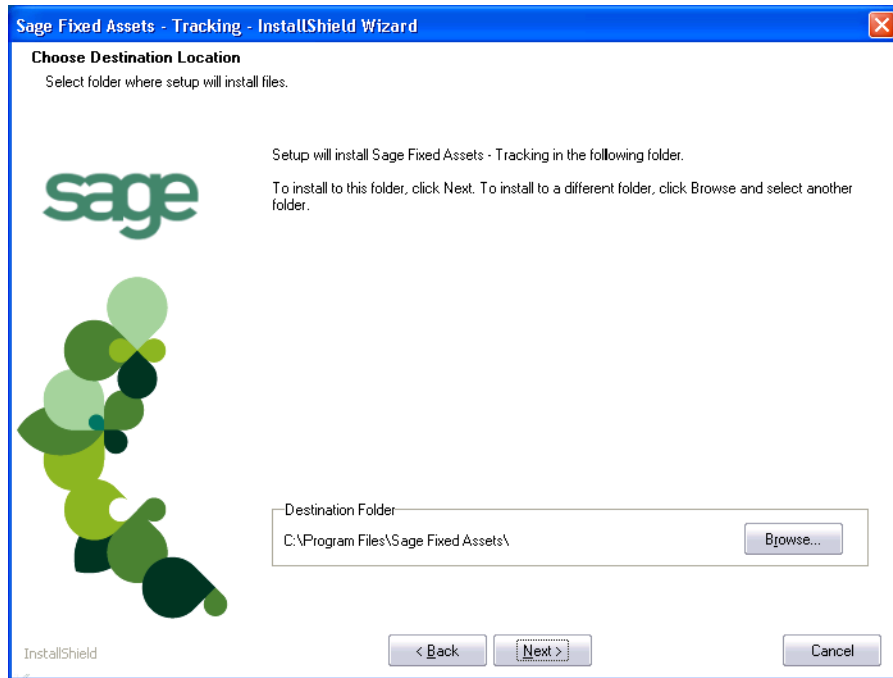
14. Enter your name, company name, and customer number. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

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

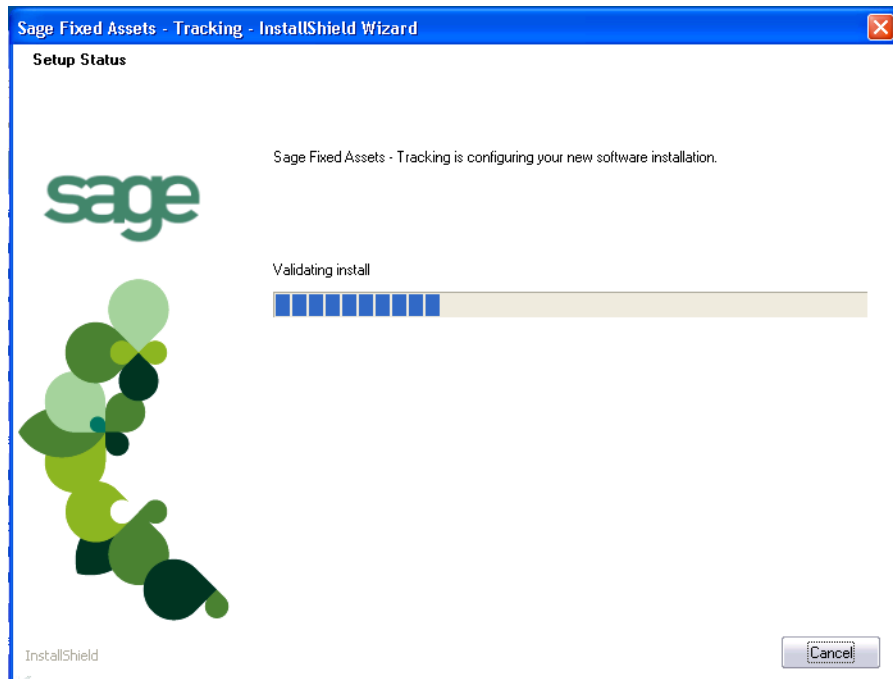
15. Click the Next button. The Choose Destination Location dialog appears.

4 Installing Sage Fixed Assets - Tracking the First Time

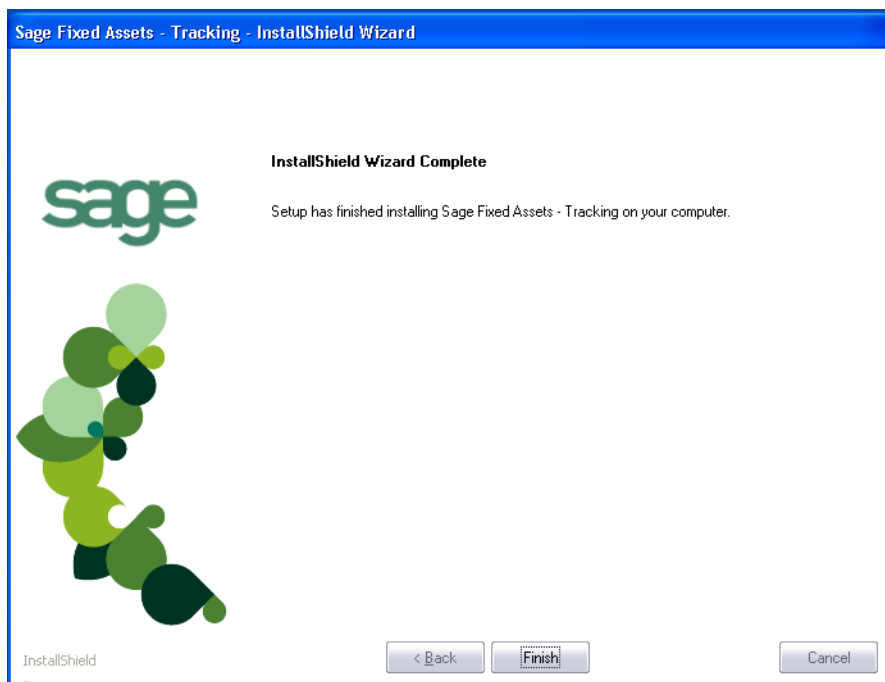
Step 2: Installing the Latest Version



16. 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.



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

Step 3: Installing the Barcode Reader Program

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

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

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

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

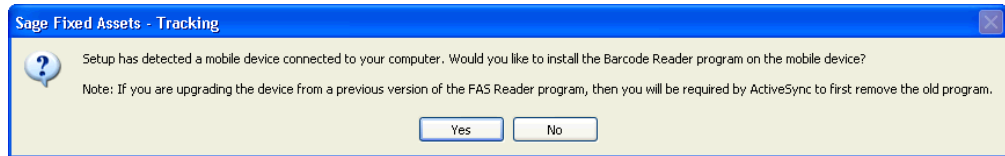
- Attach the physical reader to your computer.
- Double-click the SETUP.EXE file located in the Reader folder where you installed Sage Fixed Assets - Tracking. The default location is C:\Program Files\Sage Fixed Assets\Reader.

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

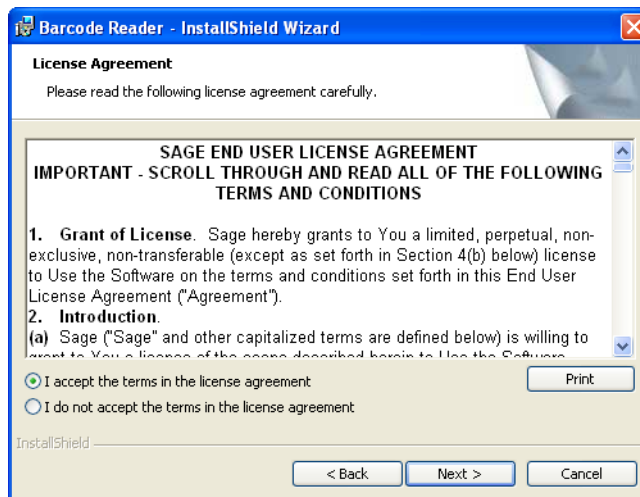
To install the Barcode Reader program to the physical reader

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

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

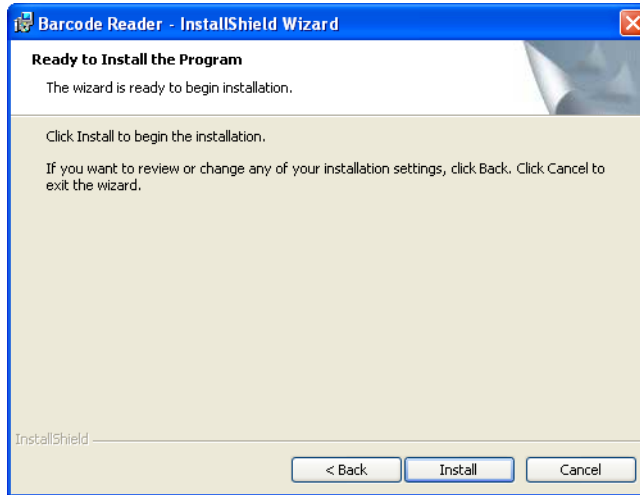


2. Click Yes. The Welcome dialog appears.
3. Click the Next button. The License Agreement dialog appears.



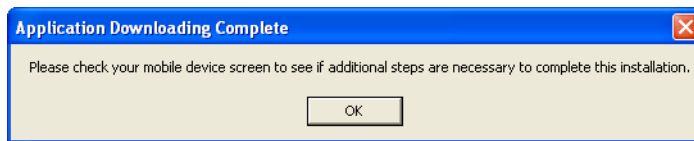
4. Read the license agreement, accept the terms of the license agreement, and then click the Next button. (If you do not accept the terms of the license agreement, click the Cancel button and the system exits from the installation program.)

The Ready to Install the Program dialog appears.

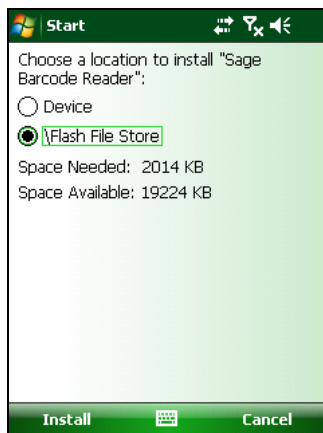


5. Click the Install button. The system displays a dialog that indicates the progress of the installation.

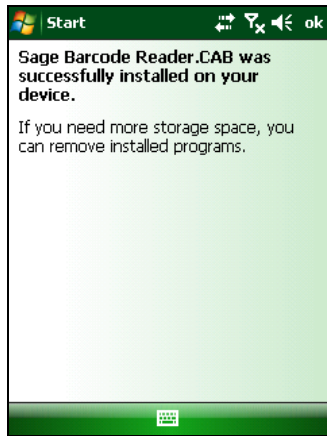
When the installation is complete, a message asks you to check your physical device screen for additional steps to complete the installation.



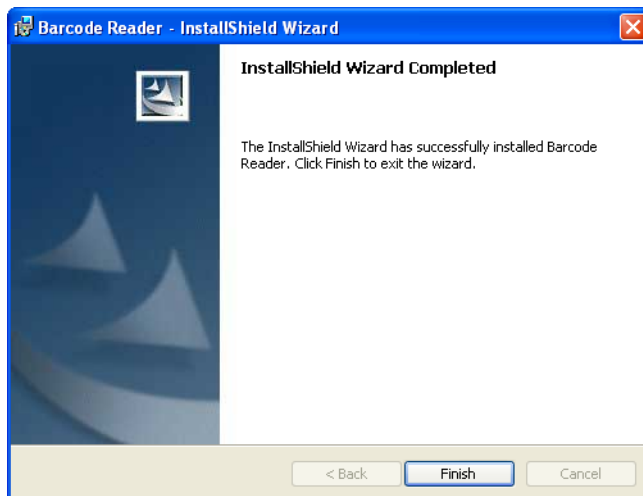
6. Click OK. On the physical device, a message allows you to select the location for installing the Barcode Reader program.



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



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



8. Click the Finish button.

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

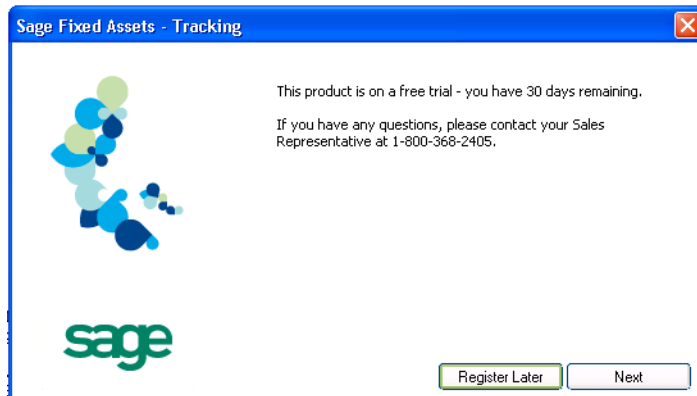
Step 4: Registering the Application

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

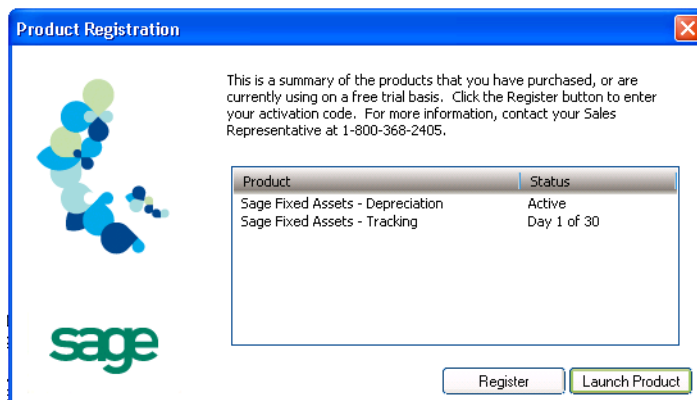
Note: You have 30 days to register the application.

To register the application

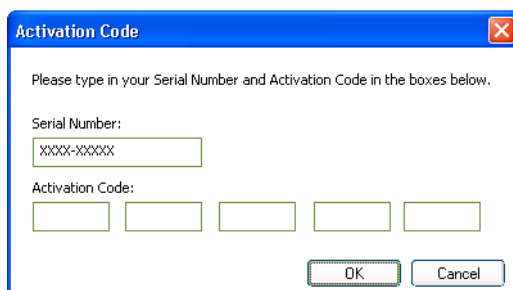
1. Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
2. Select the Sage Fixed Assets program group.
3. Select the Tracking icon. A message appears indicating you can use the application for 30 days.



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



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



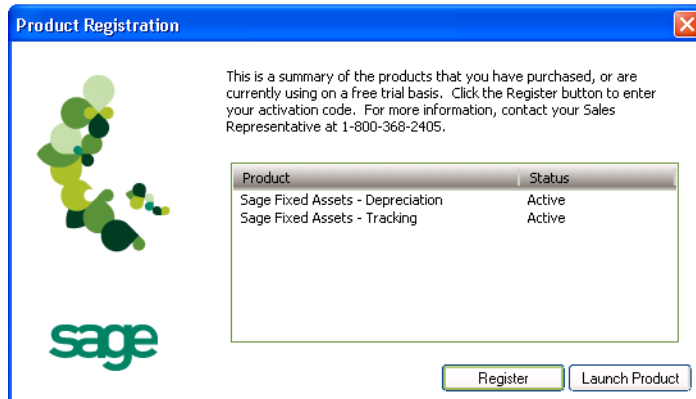
- **Serial Number**
 Enter your serial number. **You must enter the hyphen.**

■ Activation Code

Enter your activation code.

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

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



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

Step 5: Starting the Application

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

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

To start the application

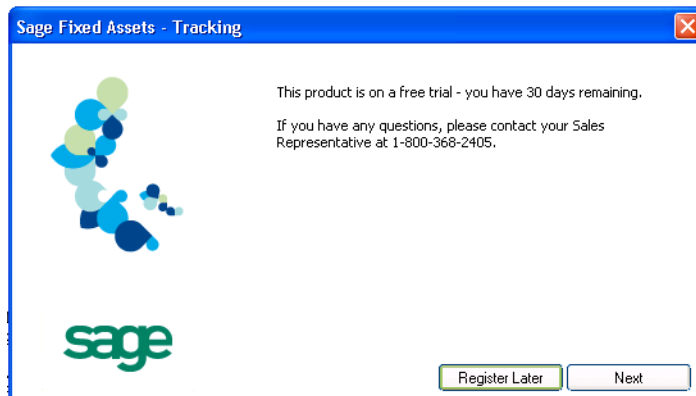
Starting the purchased version:

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

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

Starting the free trial version:

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



4. Click the Register Later button.

The system opens the application and displays the main window.

To update your customer number

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

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

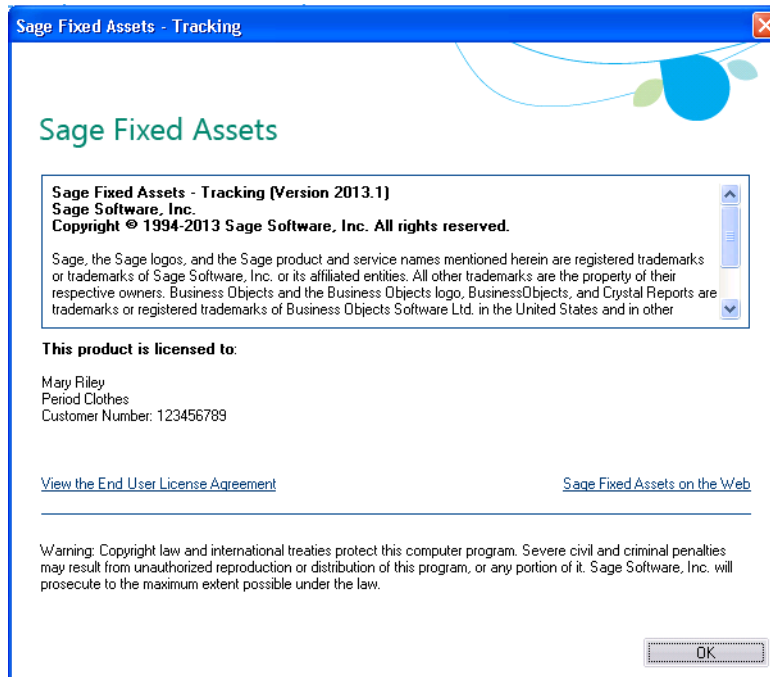
A screenshot of a dialog box titled "Update User Information" within the "Sage Fixed Assets - Tracking" application. The dialog has a blue title bar with a close button (X) on the right. Below the title bar, the text reads: "Stay connected with us by providing the information below. Please enter a value for each field then click OK to close." There is a question mark icon to the right of this text. Below the text are five text input fields, each with a label to its left: "Name:" (containing "Mary Riley"), "Job Title:" (containing "Senior Accountant"), "Email:" (containing "Mary.Riley@pc.com"), "Company:" (containing "Period Clothes"), and "Customer Number:" (containing "123456789"). At the bottom left of the dialog, there is a link: "> Where can I find my customer number?". At the bottom right, there are 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 - Tracking: Upgrading from a Prior Version

In this chapter:

Previous Versions Compatible with the Latest Version	5-1
Overview of the Upgrade Process	5-1
Step 1: Backing Up Your Data	5-2
Step 2: Installing the Latest Version	5-2
Step 3: Upgrading the Barcode Reader Program	5-7
Step 4: Converting Your Data	5-11
Step 5: Starting the Application	5-18

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

Previous Versions Compatible with the Latest Version

The table below shows the version you must be currently using of Sage Fixed Assets - Tracking to follow the steps in this chapter. If you are not running the version shown in the table, you will need to install prior releases in sequential order through the compatible version before you upgrade.

Product	Compatible Versions
Sage Fixed Assets	12.1 and later
Sage Fixed Assets Canadian Edition	12.1 and later
Sage Fixed Assets Government or Nonprofit Edition	2013.0

Note: Sage Fixed Assets - Reporting uses Crystal Reports XI, which was shipped with Sage Fixed Assets versions 2008.2 and later. If you installed Sage Fixed Assets - Reporting with Sage Fixed Assets version 2008.2 or later, you do not need to install it again.

Overview of the Upgrade Process

The upgrade process consists of the following steps:

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

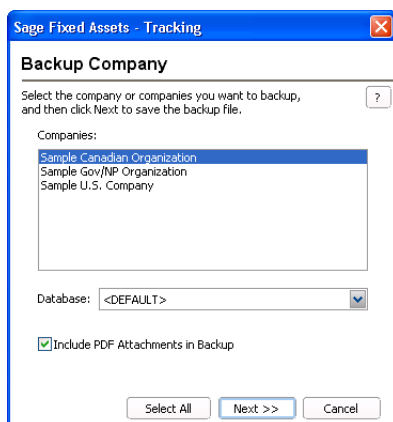
4. Converting your current data, [page 5-11](#).
5. Starting the application, [page 5-18](#).

Step 1: Backing Up Your Data

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

To back up your database

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



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

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

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

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

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

Step 2: Installing the Latest Version

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

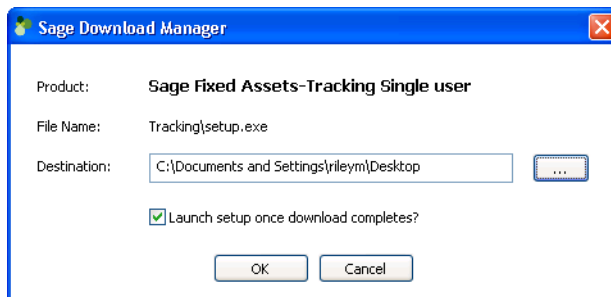
- Close all other Windows programs.
- Close all tool bars on your computer's desktop (such as the Microsoft Office tool bar).

- Close all programs that run in the background after you start your computer (such as virus-checking programs).
- Make sure you have **Administrative rights** to the local computer.

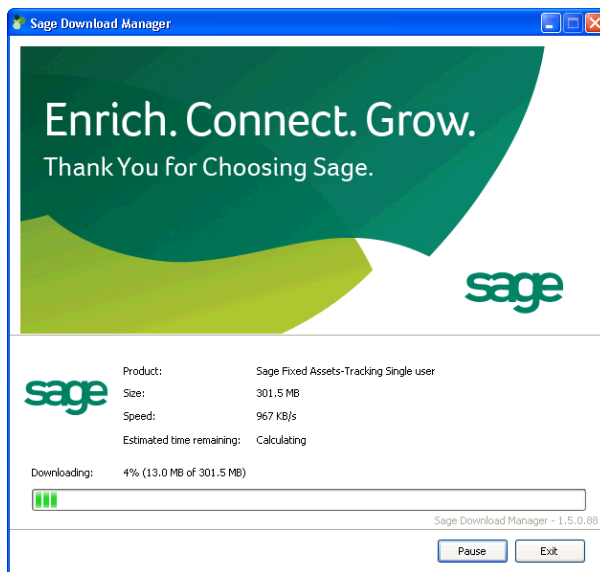
When installing the application, we recommend you accept the default options and directory locations the installation program provides. However, you can customize the installation to suit your needs by choosing the components you want to install.

To start the install program

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

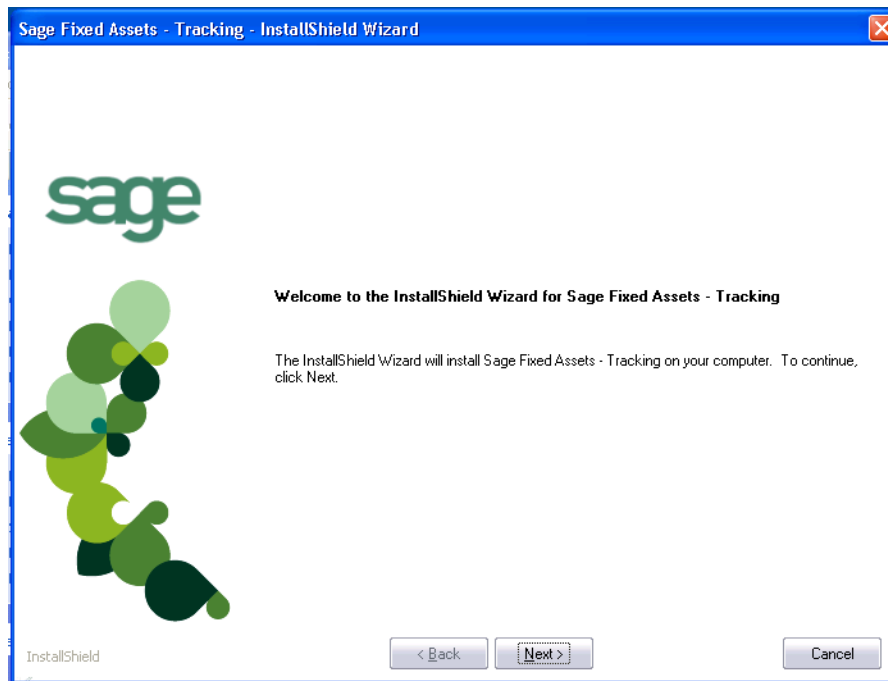


6. Click OK. The system begins to download the file.

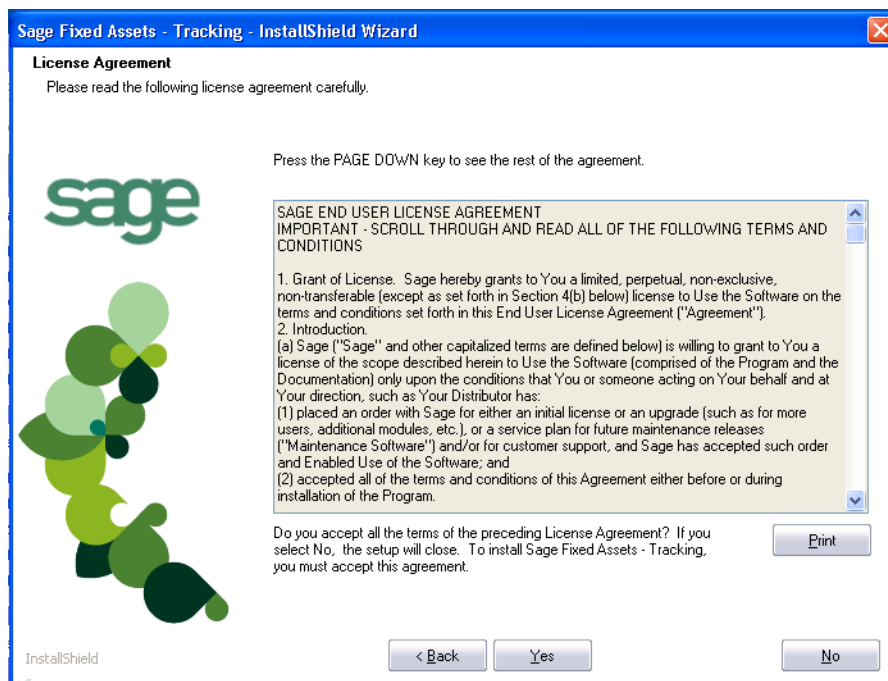


The system prompts you to install Sage Advisor Update if it is not already installed.

7. Click the Install button. The system installs Sage Advisor Update. A message indicates that you must install Microsoft .NET Framework if it is not already installed.
8. Click the Install button. The system installs Microsoft .NET Framework and then displays the Welcome dialog. (You may need to restart your machine.)



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



■ **Print Button**

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

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

The screenshot shows a dialog box titled "Sage Fixed Assets - Tracking - InstallShield Wizard". The main heading is "Customer Information" with the instruction "Please enter your information." Below this is the Sage logo and a decorative graphic of green circles. The text prompts the user to "Please enter your name, the name of the company for which you work and your customer number." There are three input fields: "User Name:" containing "Mary Wilson", "Company Name:" containing "Period Clothes", and "Customer Number:" containing "123456789". A note at the bottom states: "If you don't know your customer number visit www.SageFAS.com/customernumber or call customer service at 800-368-2405." At the bottom of the dialog are three buttons: "< Back", "Next >" (highlighted with a dashed border), and "Cancel".

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

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

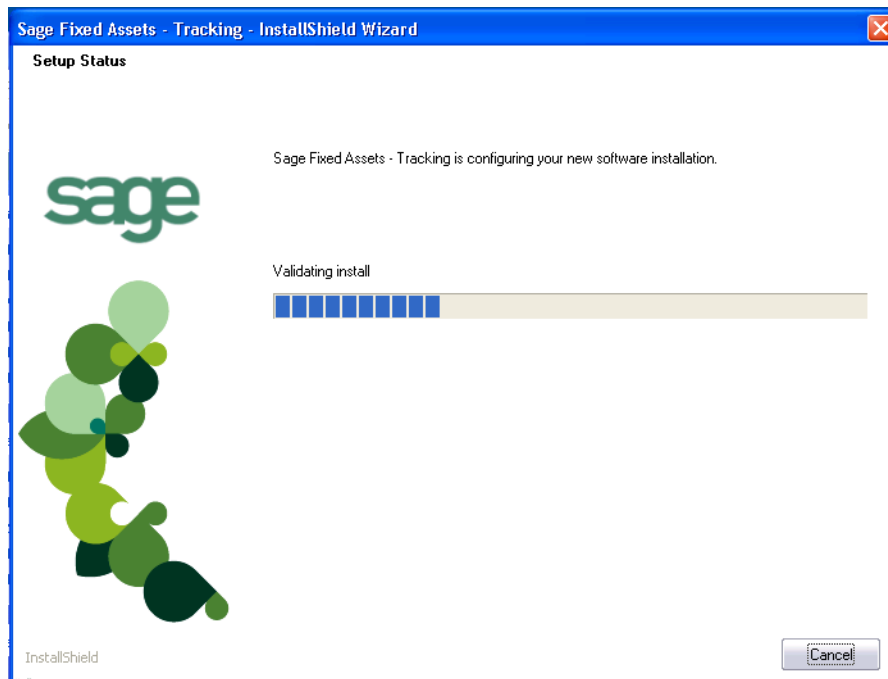
13. Click the Next button. A message appears indicating that a previous version of the program has been found on your computer.

The screenshot shows a message dialog box titled "Sage Fixed Assets - Tracking". 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 says: "Please be sure you have completed the following tasks before continuing with the installation:" followed by a bulleted list: "- 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.)" The next line says: "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." The final question is "Would you like to continue?" At the bottom are two buttons: "Yes" and "No".

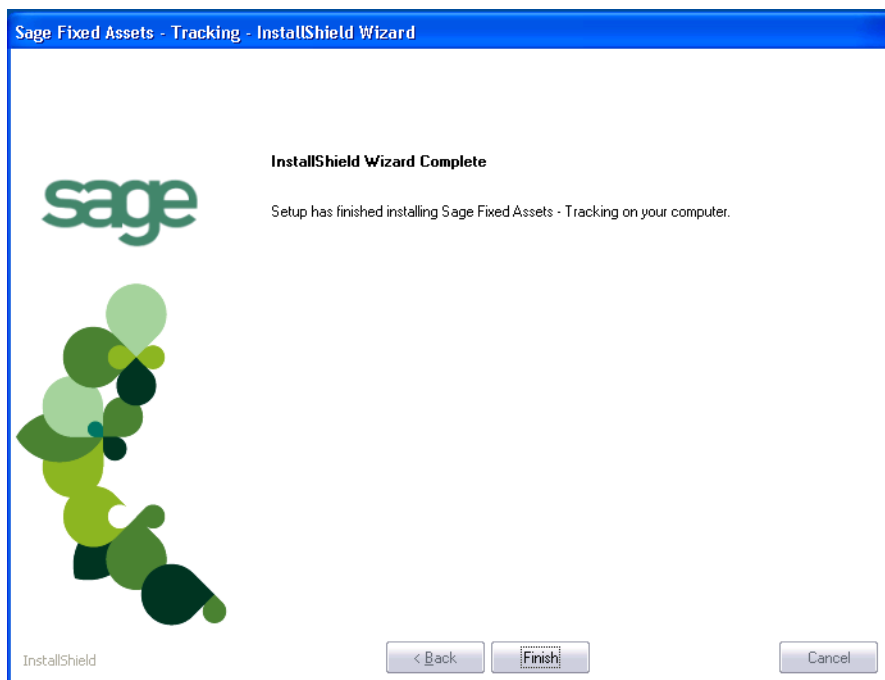
Note: Before you continue, make sure you do not have inventories in progress. After you install the latest version, the system will not be able to receive data from readers prepared in a prior version of the application.

14. Do one of the following:

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



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



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

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

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

Step 3: Upgrading the Barcode Reader Program

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

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

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

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

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

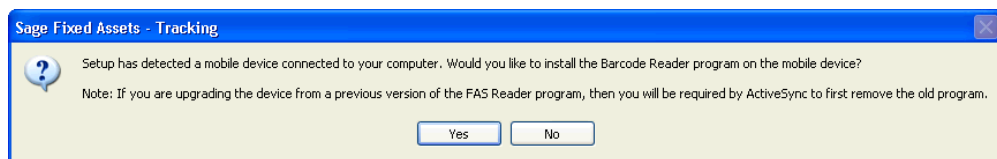
You may need to perform the steps above if you have purchased more than one reader.

To upgrade the reader program

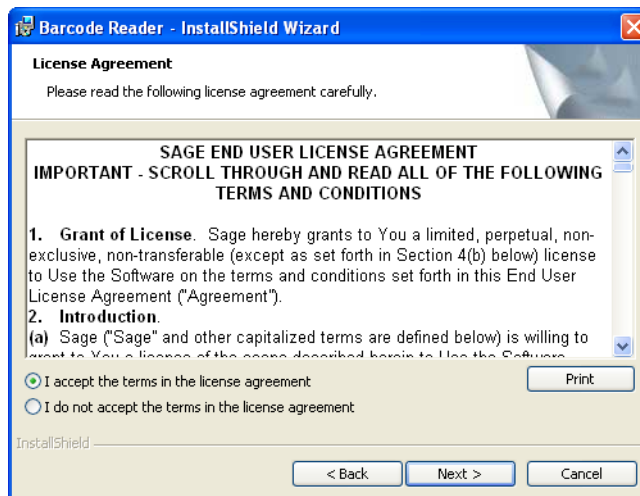
Complete the following steps if you have already installed a previous version of the reader program on your physical device.

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

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

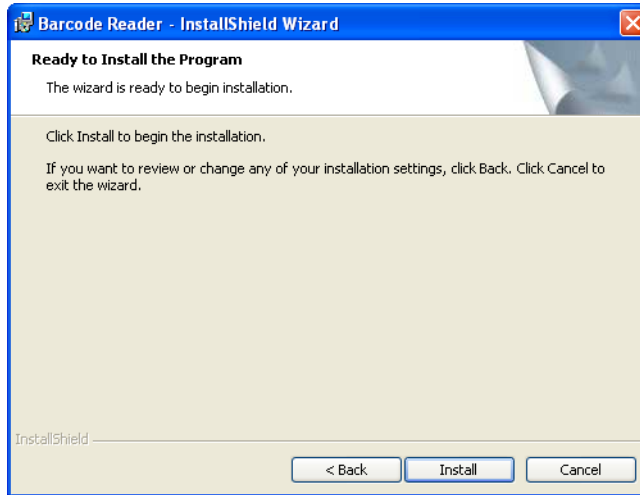


2. Click Yes. The Welcome dialog appears.
3. Click the Next button. The License Agreement dialog appears.



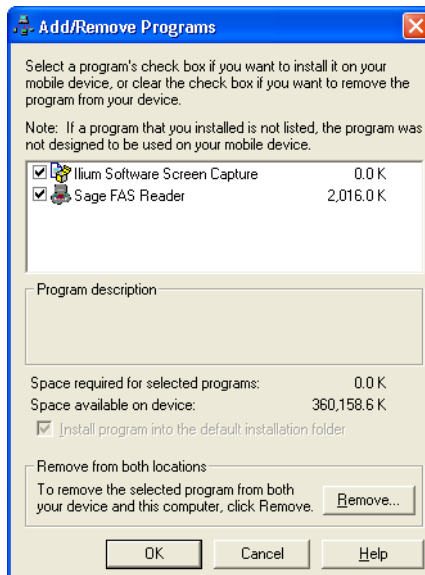
4. Read the license agreement, accept the terms of the license agreement, and then click the Next button. (If you do not accept the terms of the license agreement, click the Cancel button and the system exits from the installation program.)

The Ready to Install the Program dialog appears.

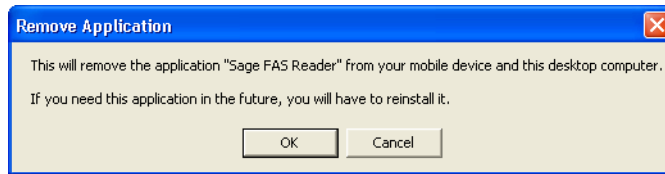


Note: Because you are upgrading the device from a previous version of the reader program, you will be required by ActiveSync or Windows Mobile Device Center to first remove the old program.

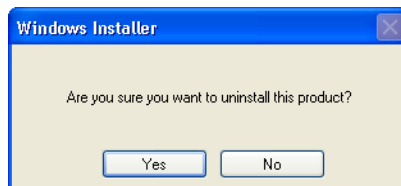
5. Click the Install button. The Add/Remove Programs dialog appears.



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

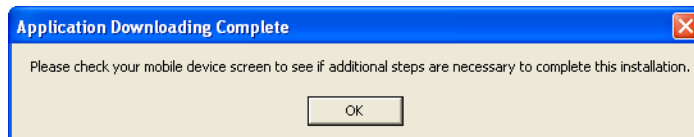


8. Click OK. The system displays a message that confirms your intention to uninstall the previous version of the program.

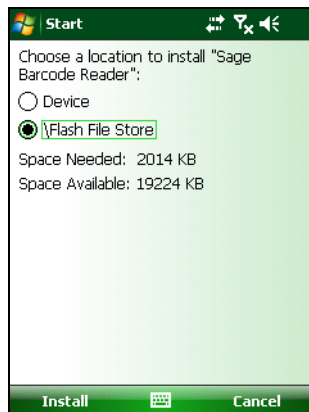


9. Click Yes. The system displays a dialog that indicates the progress of the installation of the new Barcode Reader program.

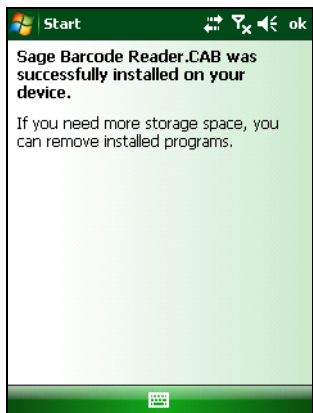
When the installation is complete, a message asks you to check your mobile device screen for additional steps to complete the installation.



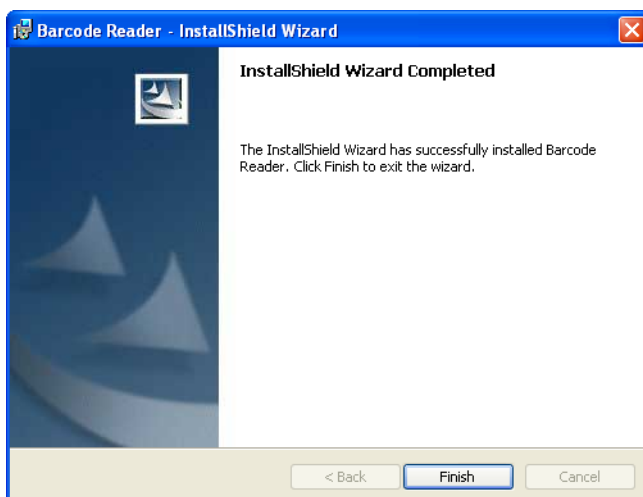
10. Click OK. On the physical device, a message allows you to select the location for installing the Barcode Reader program.



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



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



12. Click the Finish button.

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

Step 4: Converting Your Data

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

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

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

You have two options for converting your databases.

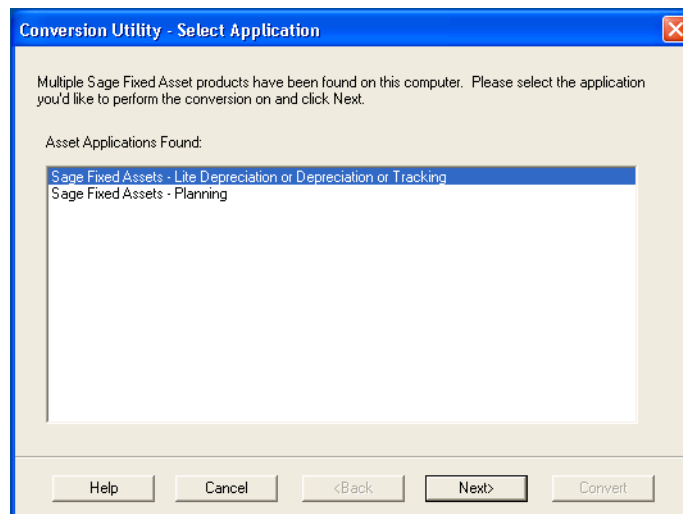
- **Database Conversion Utility:** You can use the utility to convert two or more databases at a time. You run the utility from the Sage Fixed Assets program group.
- **In-place Database Conversion:** You perform this type of database conversion when you open a database. You can convert only one database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

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

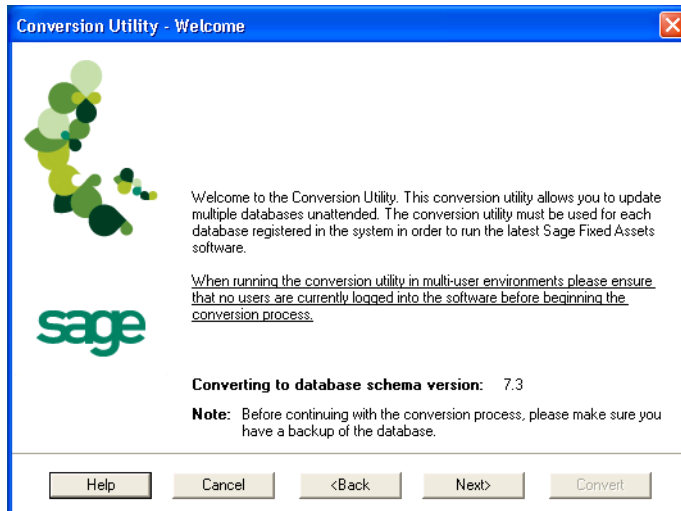
To use the database conversion utility to convert multiple databases

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

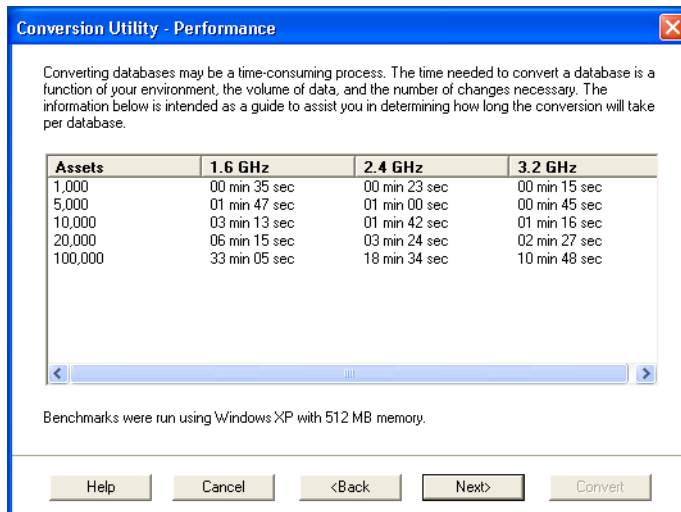
If more than one Sage Fixed Assets program is installed on your machine, the Conversion Utility Select Application dialog appears.



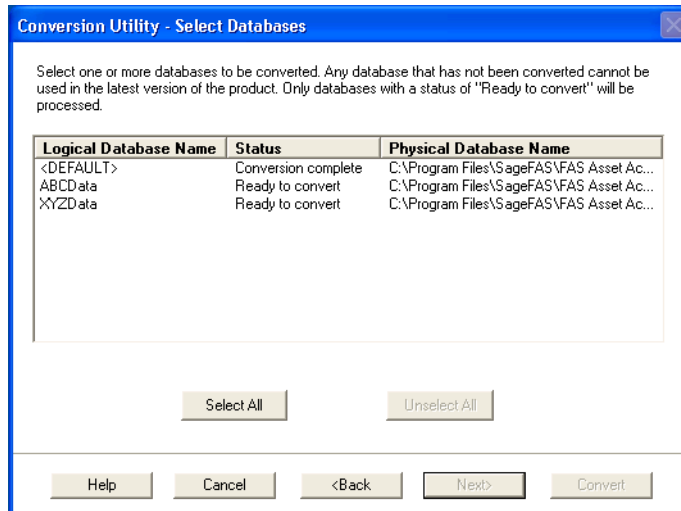
5. Select the Sage Fixed Assets program containing the database(s) that you want to convert.
6. Click the Next button. The Conversion Utility Welcome dialog appears.



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



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



This dialog displays the status of each database.

■ **Conversion Complete**

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

■ **Ready to Convert**

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

■ **Incompatible Version**

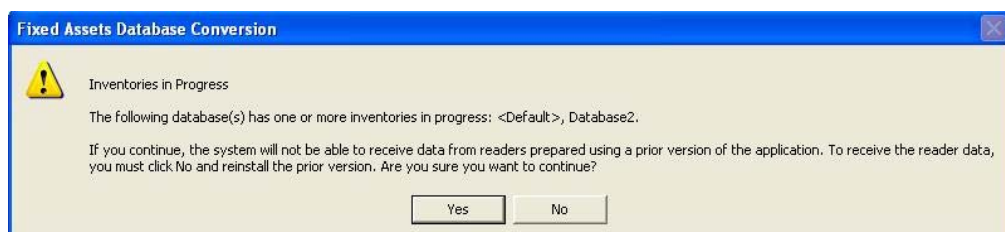
This status indicates that the database cannot be converted because the database version is incompatible with the latest version of the application. For information about which versions are compatible with the latest version of the application, see [“Previous Versions Compatible with the Latest Version,”](#)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

■ **Cannot Open**

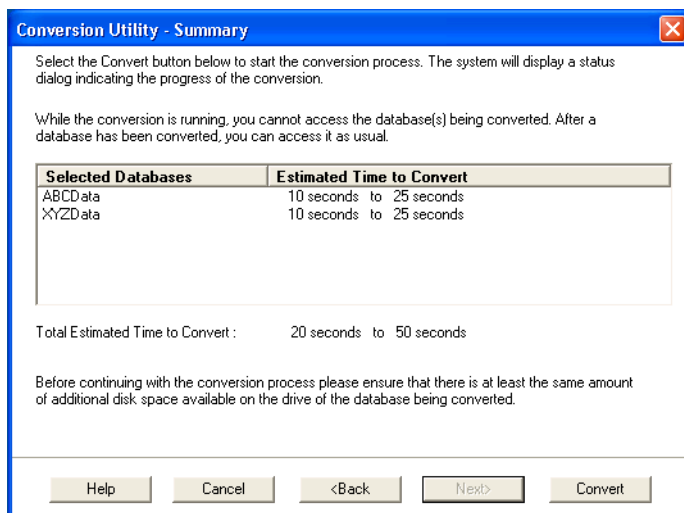
This status indicates that the database cannot be converted for an unknown reason. The database may have been moved and the system cannot locate it, or the database may be corrupted. For assistance in resolving the problem, please contact Sage Fixed Assets Customer Support.

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

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

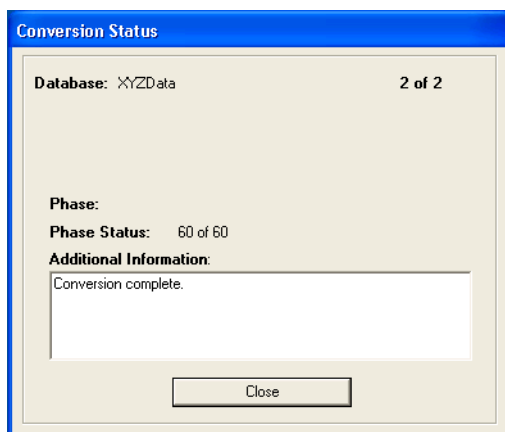


11. Click Yes to continue. The Conversion Utility Summary dialog appears.



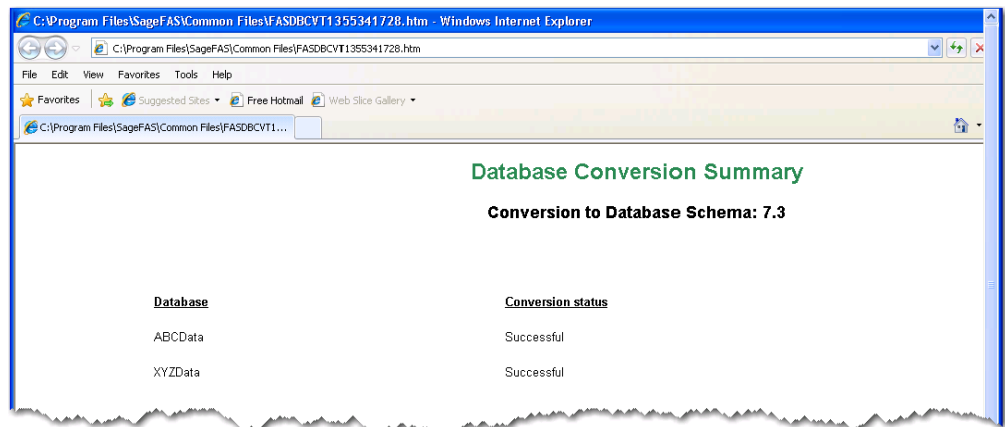
- Review the Conversion Utility Summary dialog, and then click the Convert button.

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



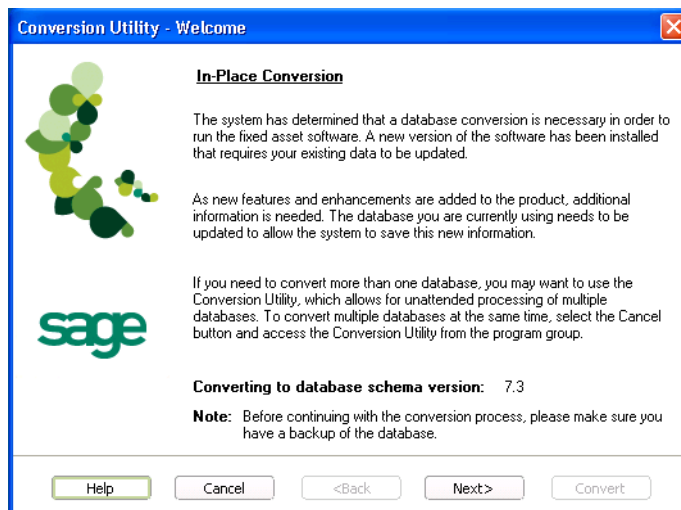
When the conversion is complete, a "Conversion Complete" message appears in the Additional Information text box.

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

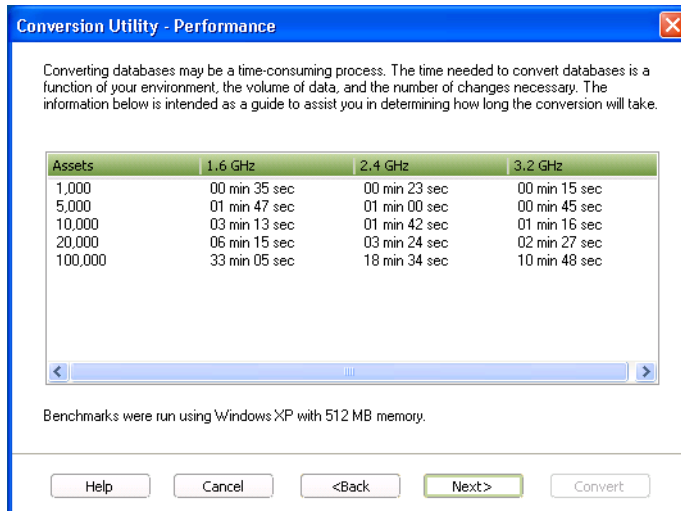


To perform an in-place database conversion

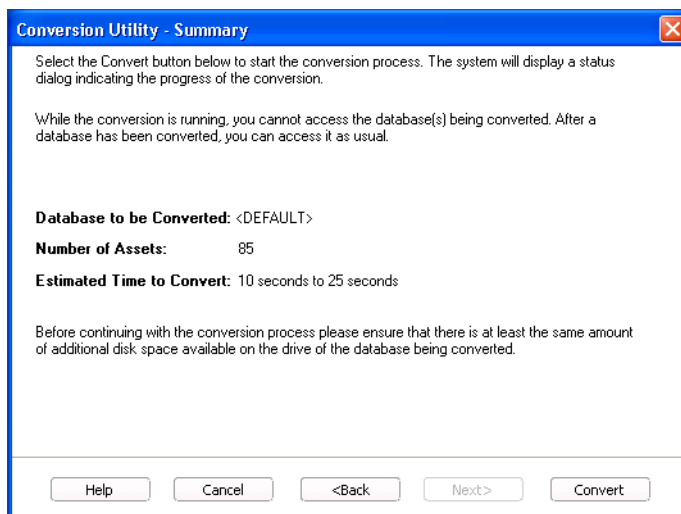
1. Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
2. Select the Sage Fixed Assets program group
3. Select the Tracking icon. The application attempts to open a database that must be converted. The Conversion Utility Welcome dialog appears.



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

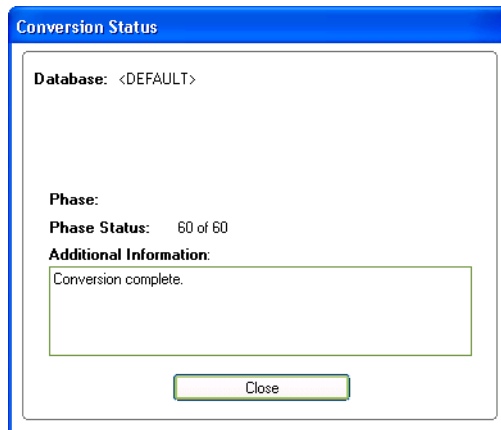


5. Review the Conversion Utility Performance dialog to estimate how long the database conversion will take.
6. Click the Next button. The Conversion Utility Summary dialog appears.



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

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



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

Step 5: Starting the Application

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

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

To start the application

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

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

To update your customer number

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

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

Sage Fixed Assets - 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:

Job Title:

Email:

Company:

Customer Number:

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

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

To view your customer number

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

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

Sage Fixed Assets - Tracking

Sage Fixed Assets

Sage Fixed Assets - Tracking (Version 2013.1)
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Mary Riley
 Period Clothes
 Customer Number: 123456789

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Chapter 6

Installing Sage Fixed Assets - Planning the First Time

In this chapter:

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

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

Overview of the Install Process

The install process consists of the following steps:

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

Step 1: Installing the Latest Version

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

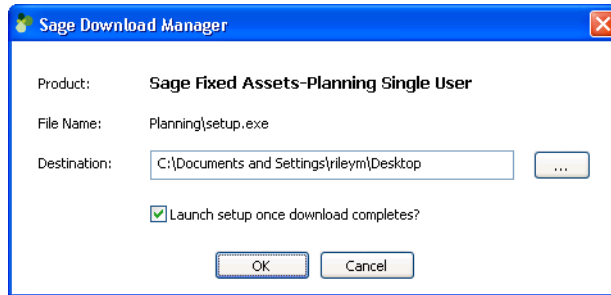
- Close all other Windows programs.
- Close all tool bars on your computer's desktop (such as the Microsoft Office tool bar).
- Close all programs that run in the background after you start your computer (such as virus-checking programs).
- Make sure you have **Administrative rights** to the local computer.

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

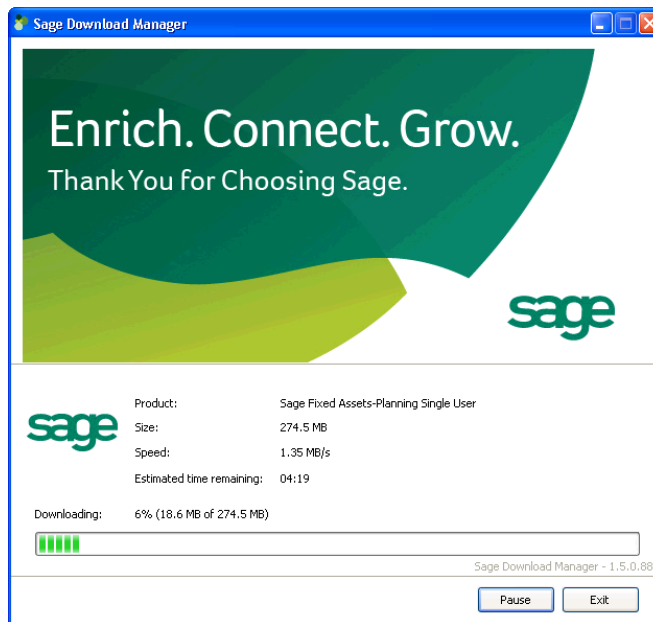
To start the install program

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

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

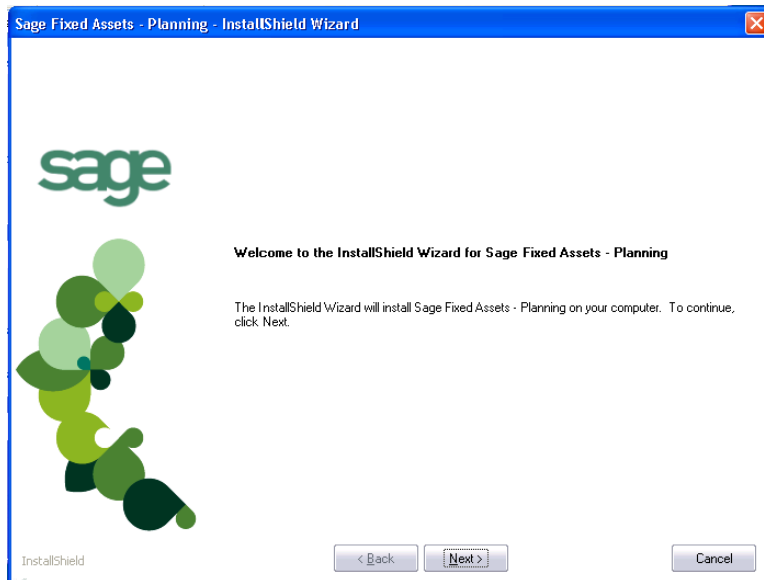


6. Click OK. The system begins to download the file.

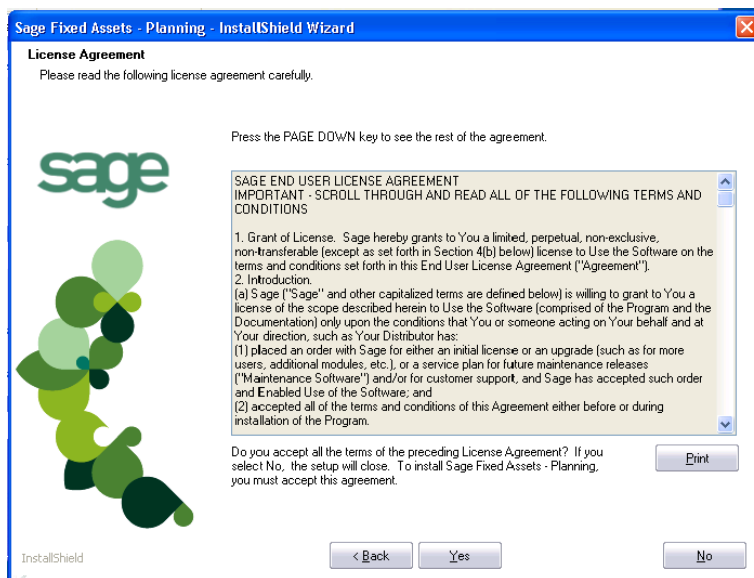


The system prompts you to install Sage Advisor Update.

7. Click the Install button. The system installs Sage Advisor Update. A message indicates that you must install Microsoft .NET Framework if it is not already installed.
8. Click the Install button. The system installs Microsoft .NET Framework and then displays the Welcome dialog. (You may need to restart your machine.)



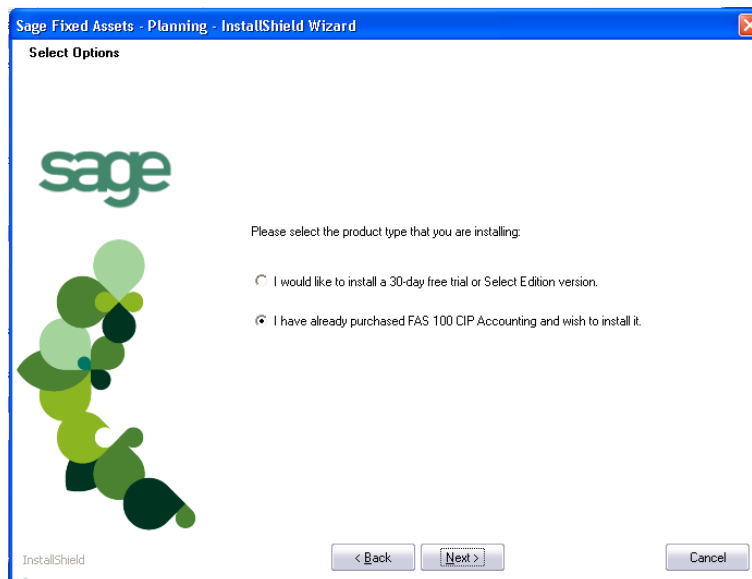
9. Click the Next button. The Software License Agreement dialog appears.



■ **Print Button**

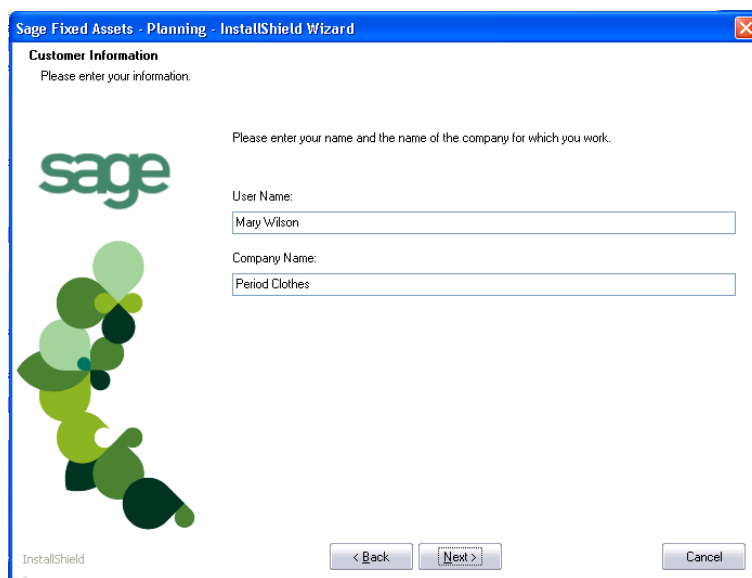
Click this button to send the license agreement to the default printer.

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



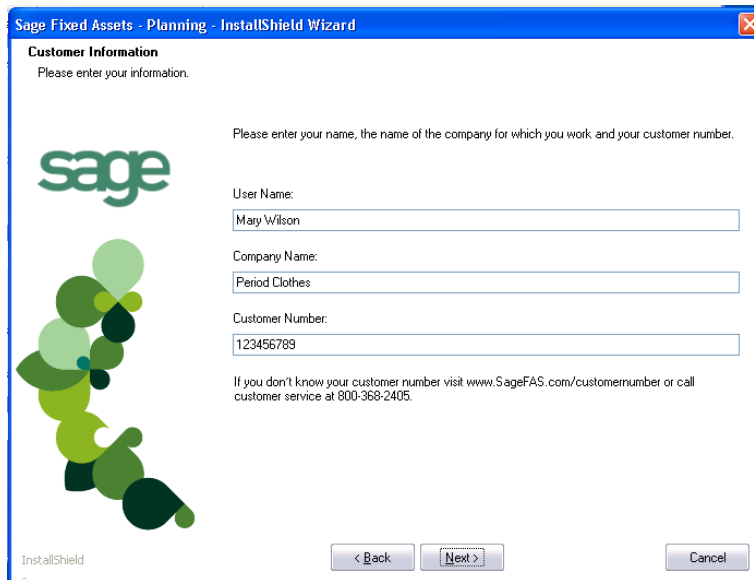
12. Select either the 30-day free trial option or the purchased option.

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



13. Enter your name and company name, and continue to step 9.

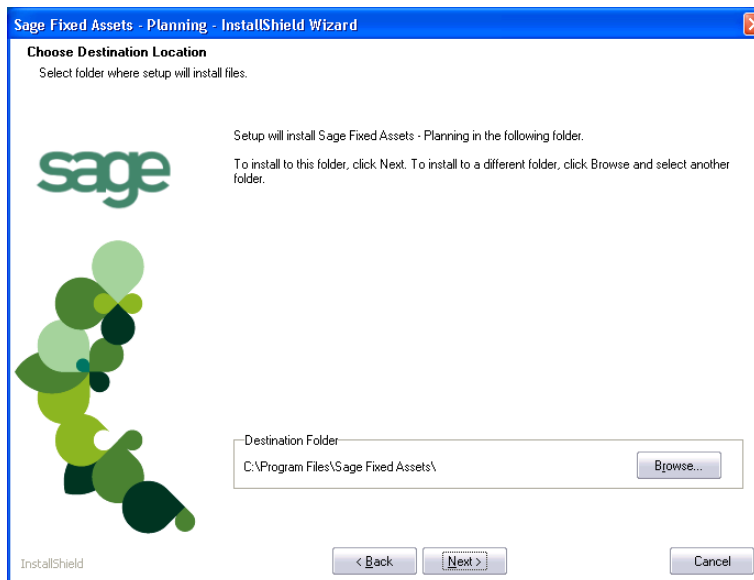
If you selected the purchased option, the following Customer Information dialog appears.



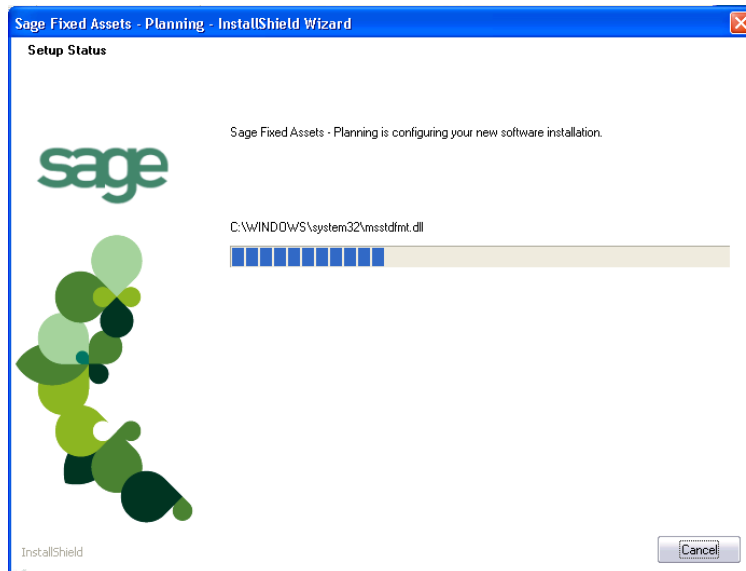
14. Enter your name, company name, and customer number. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

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

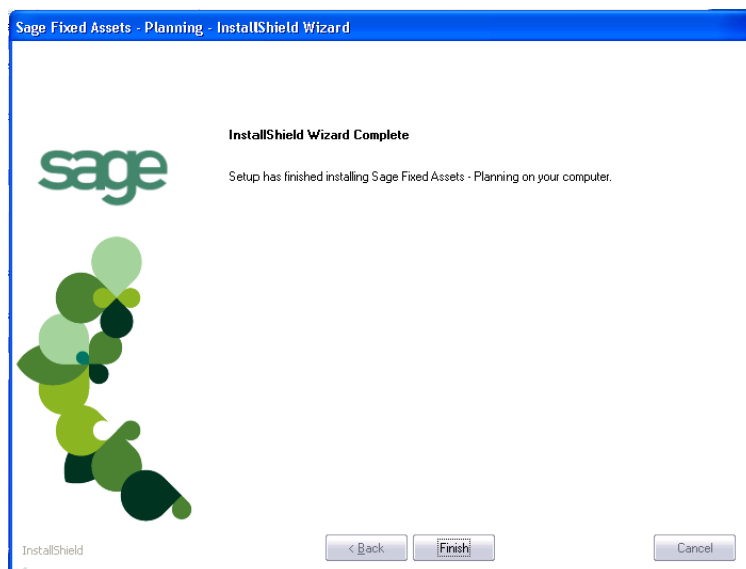
15. Click the Next button. The Choose Destination Location dialog appears.



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



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



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

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

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

Step 2: Registering the Application

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

Note: You have 30 days to register the application.

To register the application

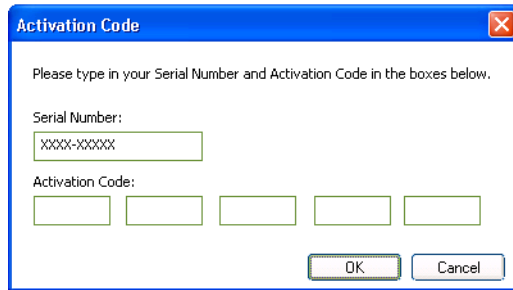
1. Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
2. Select the Sage Fixed Assets program group.
3. Select the Planning icon. A message appears indicating you can use the application for 30 days.



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



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



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

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

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



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

Step 3: Starting the Application

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

To start the application

Starting the purchased version

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

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

Starting the free trial version:


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

The system opens the application and displays the main window.

To update your customer number

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

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



Update User License Info

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

User Name:
Mary Riley

Company/Organization:
Period Clothes

Customer Number:
123456789

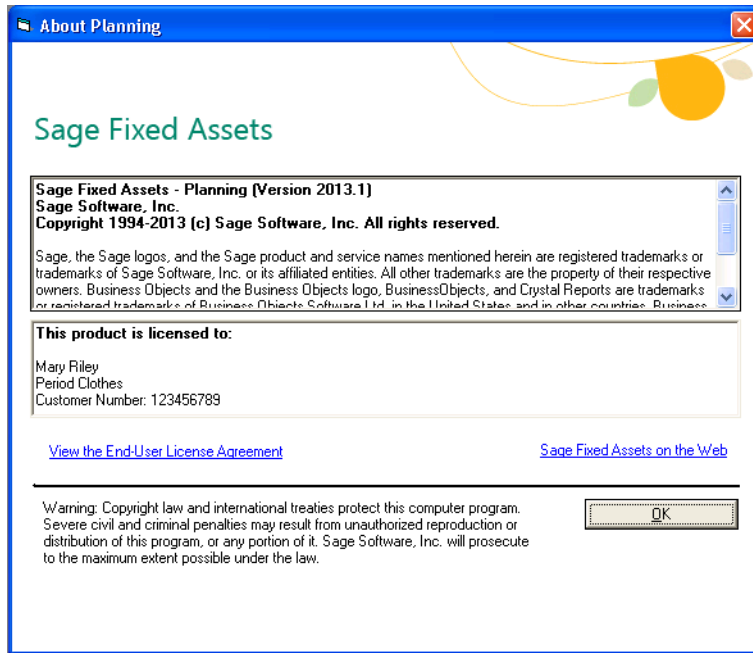
OK Cancel Help

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

To view your customer number

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

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



Chapter 7

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

In this chapter:

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

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

Previous Versions Compatible with the Latest Version

The table below shows the version you must be currently using of Sage Fixed Assets - Planning to follow the steps in this chapter. If you are not running the version shown in the table, you will need to install prior releases in sequential order through the compatible version before you upgrade.

Product	Compatible Versions
Sage Fixed Assets	2012.1 and later
Sage Fixed Assets Canadian Edition	2012.1 and later
Sage Fixed Assets Government or Nonprofit Edition	2013.0

Note: Sage Fixed Assets - Reporting uses Crystal Reports XI, which was shipped with Sage Fixed Assets versions 2008.2 and later. If you installed Sage Fixed Assets - Reporting with Sage Fixed Assets version 2008.2 or later, you do not need to install it again.

A previous version of Sage Fixed Assets - Reporting, (called FAS Report Writer) used Crystal Reports 8.5. If this version of Crystal Reports is still on your machine, we **strongly recommend** that you uninstall it to avoid conflicts with the latest version of Crystal Reports. The latest version of Sage Fixed Assets - Reporting requires 1.5 GB of hard disk space. To uninstall FAS Report Writer, go to Control Panel, click the Add or Remove Programs icon, select FAS Report Writer from the list, and click the Remove button.

Overview of the Upgrade Process

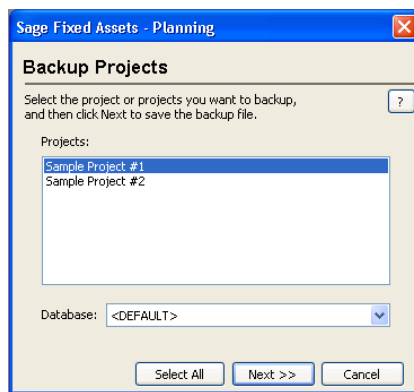
The upgrade process consists of the following steps:

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

Step 1: Backing Up Your Data

To back up your database

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



2. Select the projects that you want to back up, and click the Next button.
3. Designate the destination directory, enter a file name for the backup file, and then click the Backup button.
4. After the backup is complete, click the Cancel button to close the Backup Projects dialog box, or select another project to back up.

Step 2: Installing the Latest Version

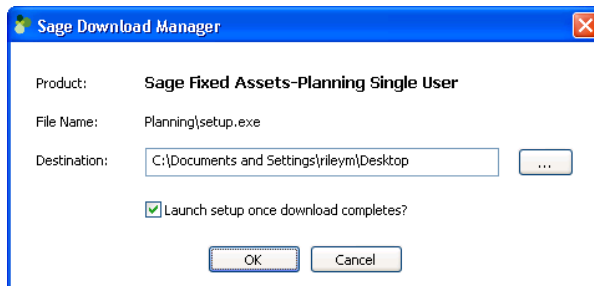
Before you begin to install the application, you should do the following:

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

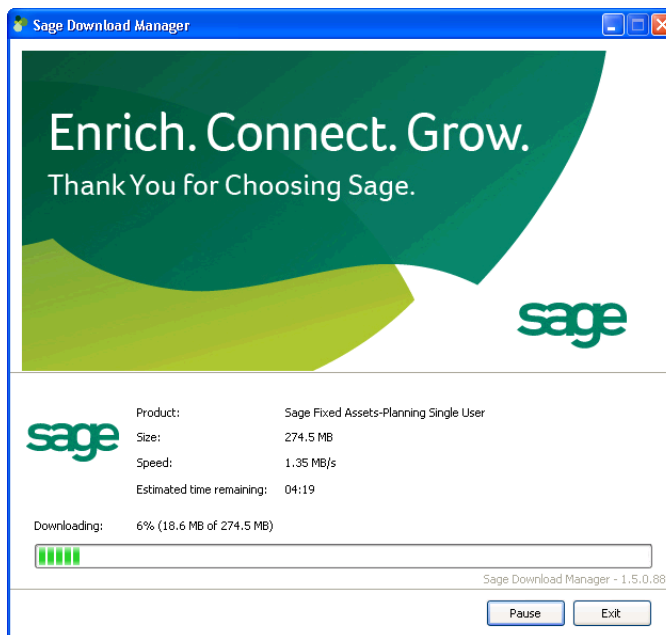
When installing the application, we recommend you accept the default options and directory locations the installation program provides. However, you can customize the installation to suit your needs by choosing the components you want to install.

To start the install program

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

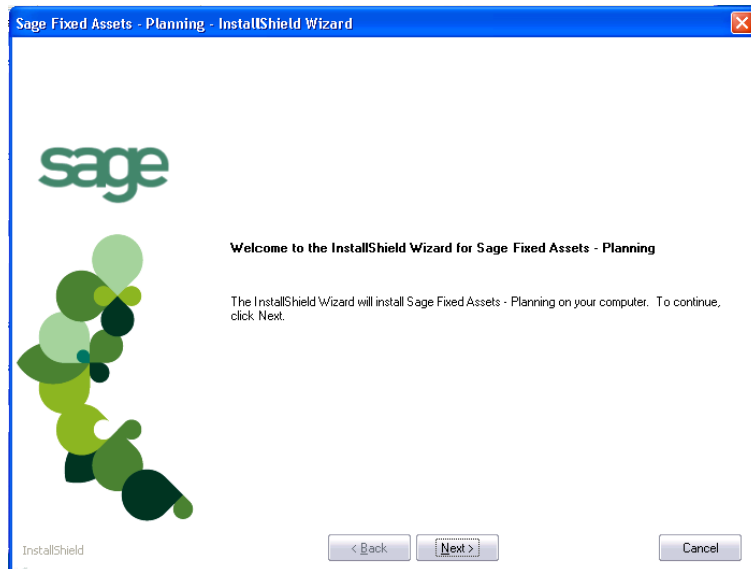


6. Click OK. The system begins to download the file.

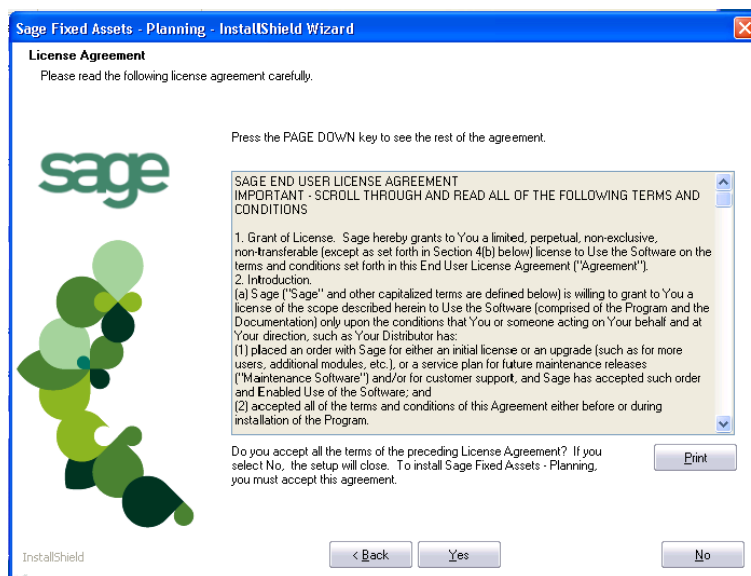


The system prompts you to install Sage Advisor Update.

7. Click the Install button. The system installs Sage Advisor Update. A message indicates that you must install Microsoft .NET Framework if it is not already installed.
8. Click the Install button. The system installs Microsoft .NET Framework and then displays the Welcome dialog. (You may need to restart your machine.)



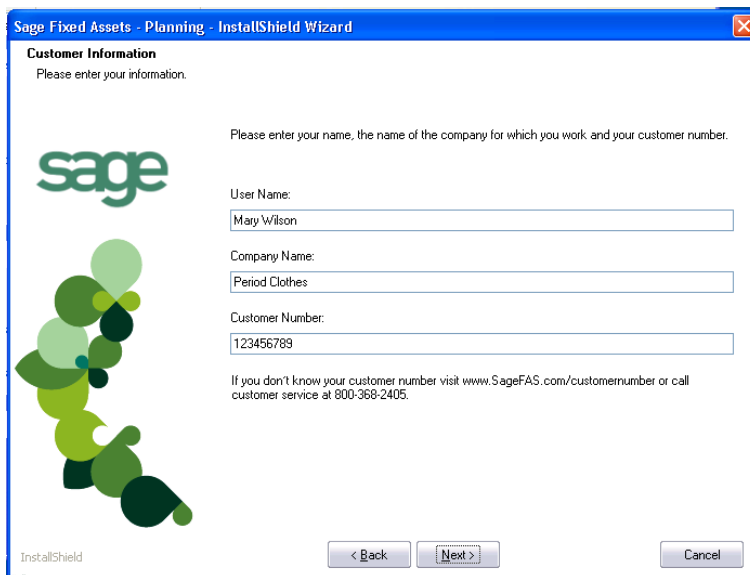
9. Click the Next button. The Software License Agreement dialog appears.



■ **Print Button**

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

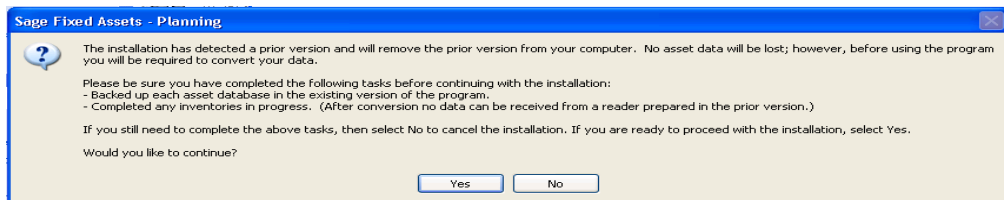
10. Read the license agreement, and then click the Yes button to accept the terms of the agreement. (If you do not accept the terms of the license agreement, click the No button. The system exits from the installation program.)
11. After you click the Yes button, the Customer Information dialog appears.



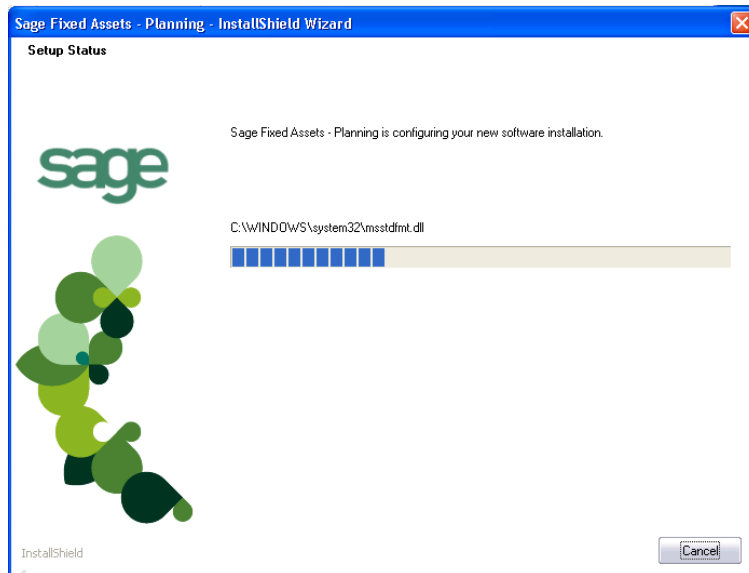
12. Enter your name, company name, and customer number. You will need your customer number if you call Sage Fixed Assets Customer Support with a technical question.

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

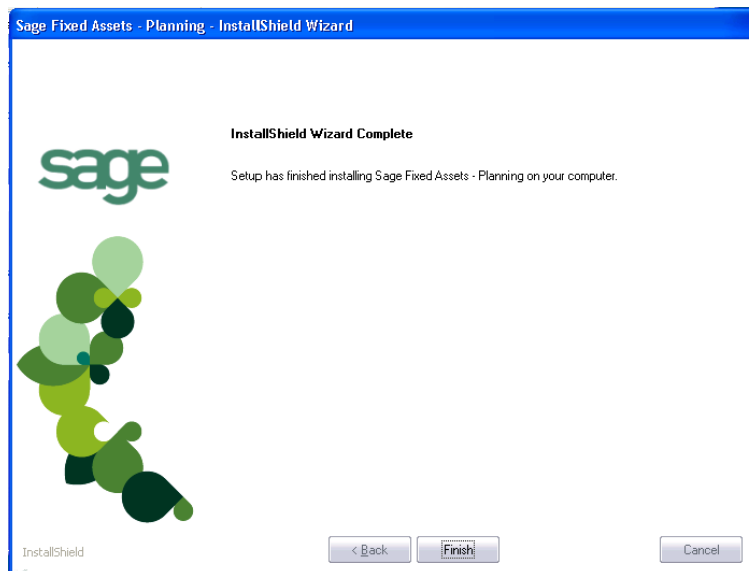
13. Click the Next button. A message appears indicating that a previous version of the program has been found on your computer.



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



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



If the installation program determines that you need to restart your computer before you use the program, it displays two options on the InstallShield Wizard Complete dialog 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.

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

Step 3: Converting Your Data

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

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

You have two options for converting your databases.

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

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

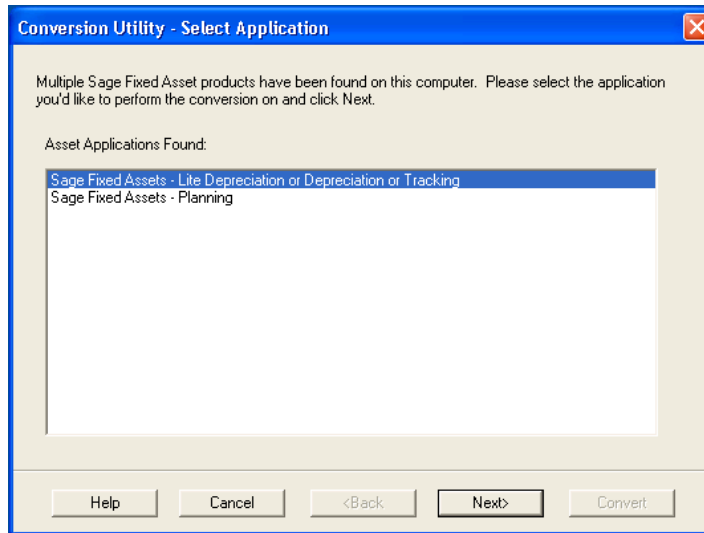
Converting a database is a time-consuming process. Please refer to the table below, which outlines the recommended conversion procedure:

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

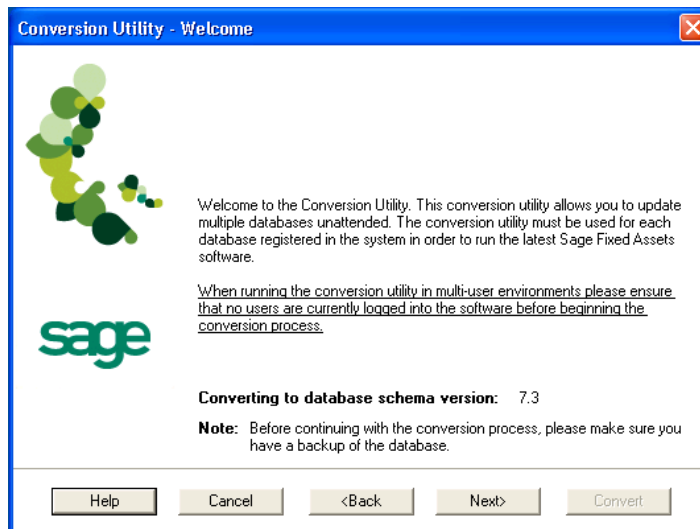
To use the Database Conversion Utility to convert databases

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

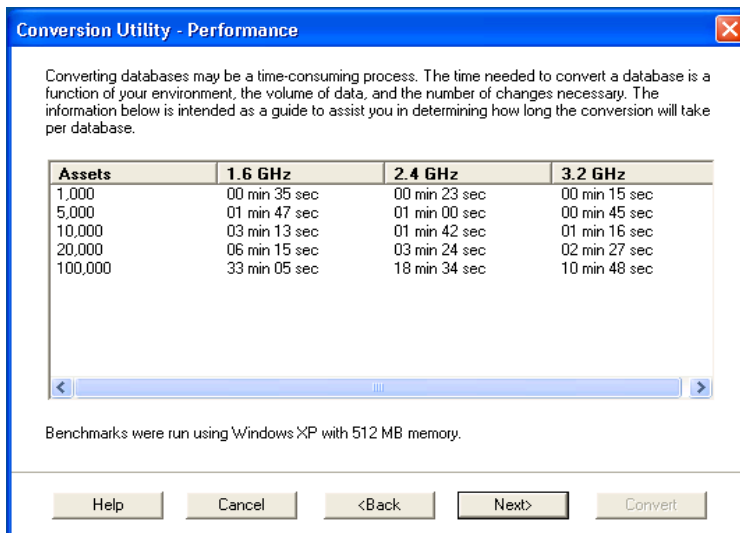
If more than one Sage Fixed Assets program is installed on your machine, the Conversion Utility Select Application dialog appears.



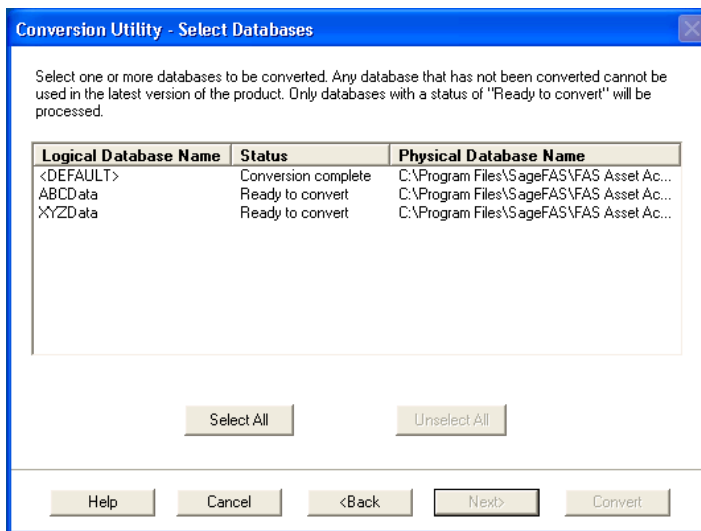
5. Select the Sage Fixed Assets program containing the database that you want to convert.
6. Click the Next button. The Conversion Utility Welcome dialog appears.



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



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



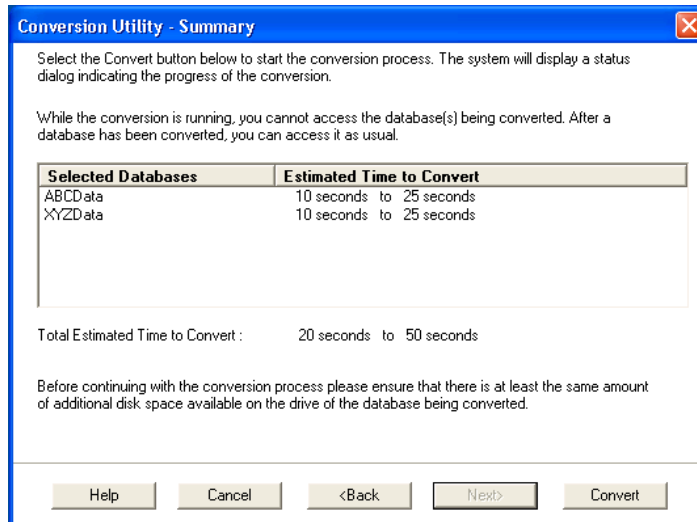
This dialog displays the status of each database.

- **Conversion Complete**
 This status indicates that the database has already been converted to the latest version.
- **Ready to Convert**
 This status indicates that the database is ready to be converted to the latest version.
- **Incompatible Version**
 This status indicates that the database cannot be converted because the database version is incompatible with the latest version of the application. For information about which versions are compatible with the latest version of the application, see [“Previous Versions Compatible with the Latest Version,”](#) page 7-1. For assistance in converting your databases, please contact Sage Fixed Assets Customer Support.

■ **Cannot Open**

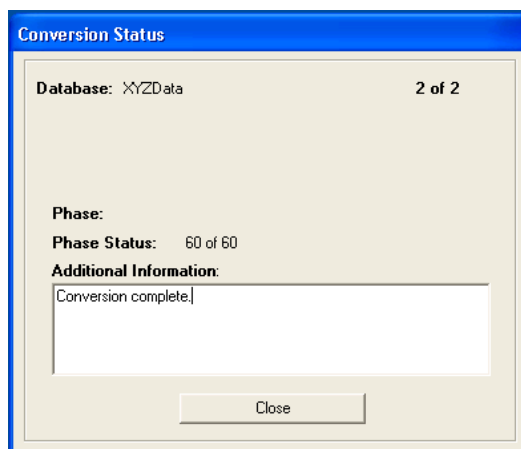
This status indicates that the database cannot be converted for an unknown reason. The database may have been moved and the system cannot locate it, or the database may be corrupted. For assistance in resolving the problem, please contact Sage Fixed Assets Customer Support.

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



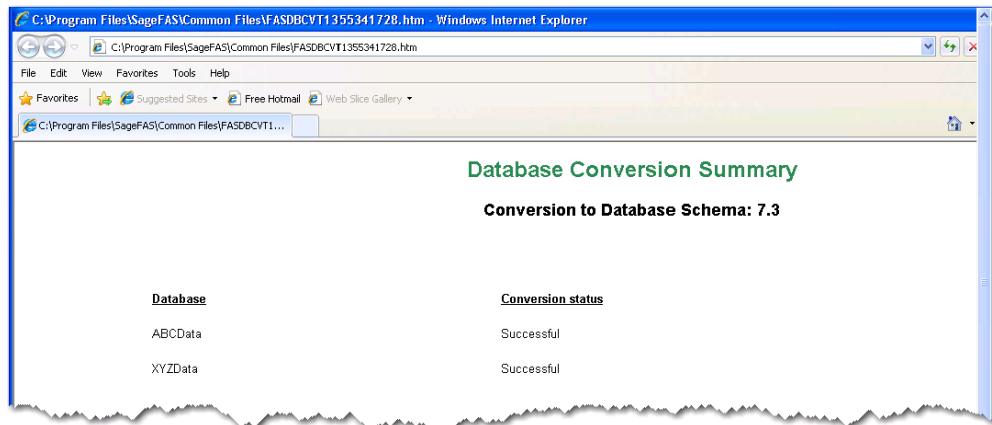
11. Review the Conversion Utility Summary dialog, and then click the Convert button.

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



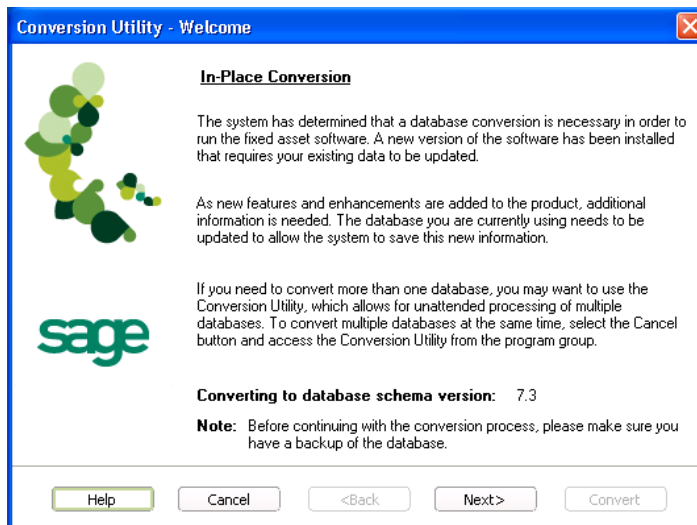
When the conversion is complete, a "Conversion Complete" message appears in the Additional Information text box.

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

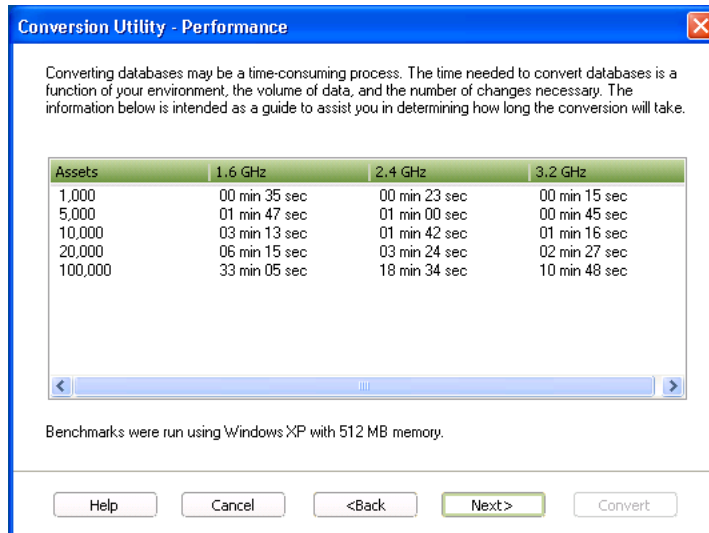


To perform an in-place database conversion

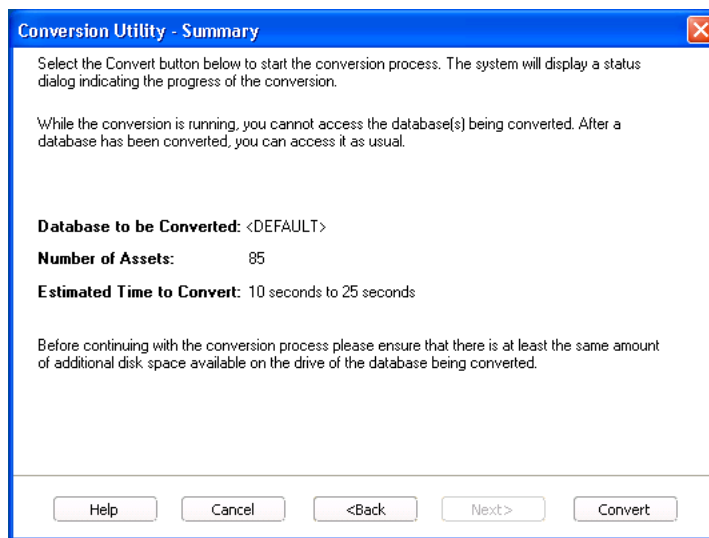
1. Click the Start button on the Windows taskbar, and then click Programs (or All Programs) on the Start submenu.
2. Select the Sage Fixed Assets program group.
3. Select the Sage Fixed Assets - Planning icon. The application attempts to open a database that must be converted. The Conversion Utility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



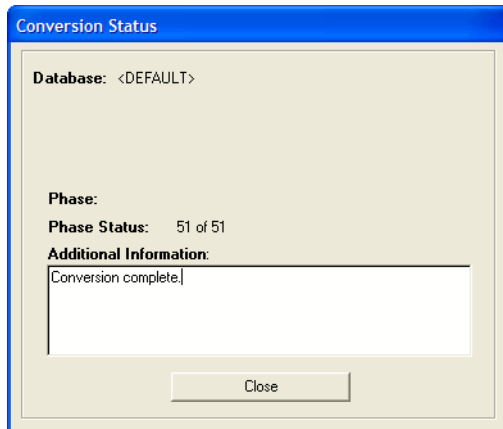
4. Click the Next button. The Conversion Utility Performance dialog appears.



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



7. Review the Conversion Utility Summary dialog, and then click the Convert button.
The application checks your computer's disk space to make sure there is sufficient space to convert your data. If there is sufficient space for the conversion, it begins to convert the database(s) and displays the Conversion Status message box.



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

Step 4: Starting the Application

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

To start the application

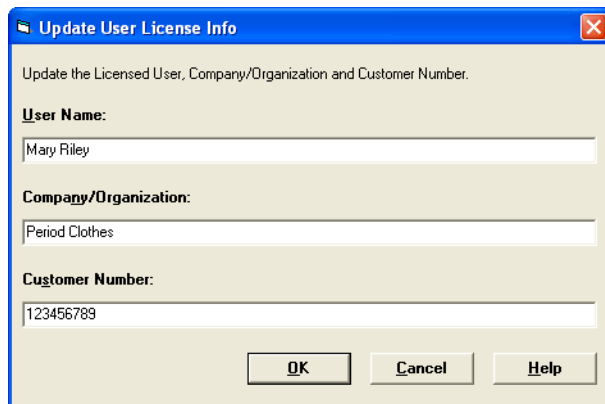
1. Click the Start button on the Windows taskbar, and then select Programs from the Start menu.
2. Select the Sage Fixed Assets program group from the Programs submenu.
3. Select the Planning icon.

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

To update your customer number

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

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

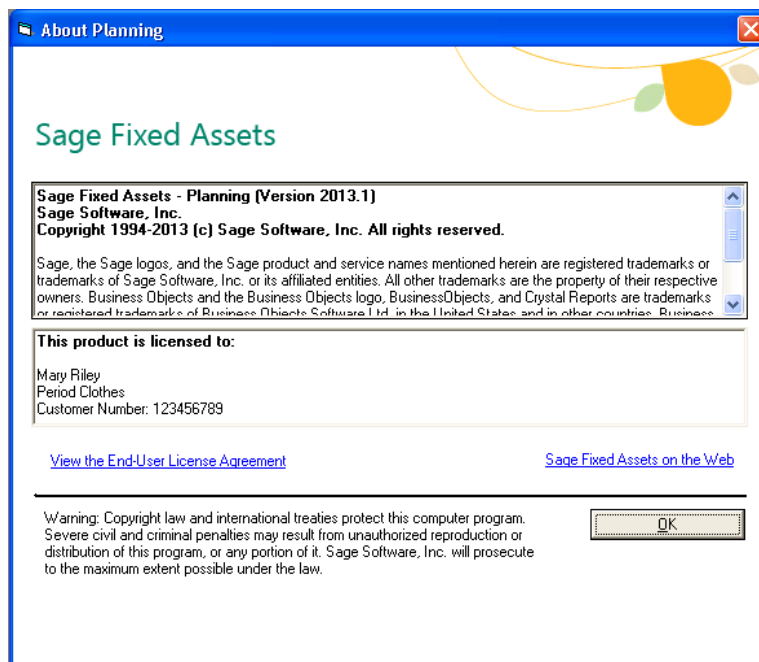


2. Enter your name, company name, and customer number, and then click OK.

To view your customer number

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

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



Chapter 8

Installing Sage Fixed Assets - Reporting

In this chapter:

Installing the Latest Version	8-1
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Note: Sage Fixed Assets - Reporting uses Crystal Reports XI, which was shipped with Sage Fixed Assets versions 2008.2 and later. If you installed Sage Fixed Assets - Reporting when you installed Sage Fixed Assets version 2008.2 or later, you do not need to reinstall it.

A previous version of FAS Report Writer, (called FAS Report Writer) used Crystal Reports 8.5. If this version of Crystal Reports is still on your machine, we **strongly recommend** that you uninstall it to avoid conflicts with the latest version of Crystal Reports. The latest version of FAS Report Writer requires 1.5 GB of hard disk space. To uninstall FAS Report Writer, go to Control Panel, click the Add or Remove Programs icon, select FAS Report Writer from the list, and click the Remove button.

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

Note: The Sage Fixed Assets - Reporting program uses Crystal Reports XI. Sage Fixed Assets - Reporting may not be compatible with other versions of Crystal Reports. Before installing Sage Fixed Assets - Reporting, we recommend that you make sure Crystal Reports XI is compatible with your other applications that run Crystal Reports.

Installing the Latest Version

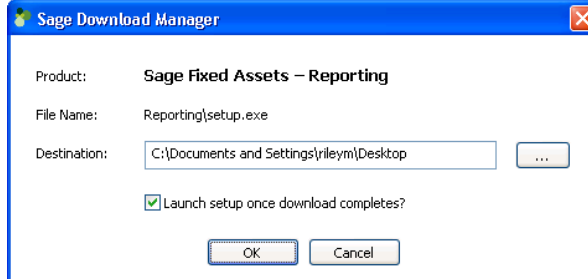
Before you begin to install the application, you should do the following:

- 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.

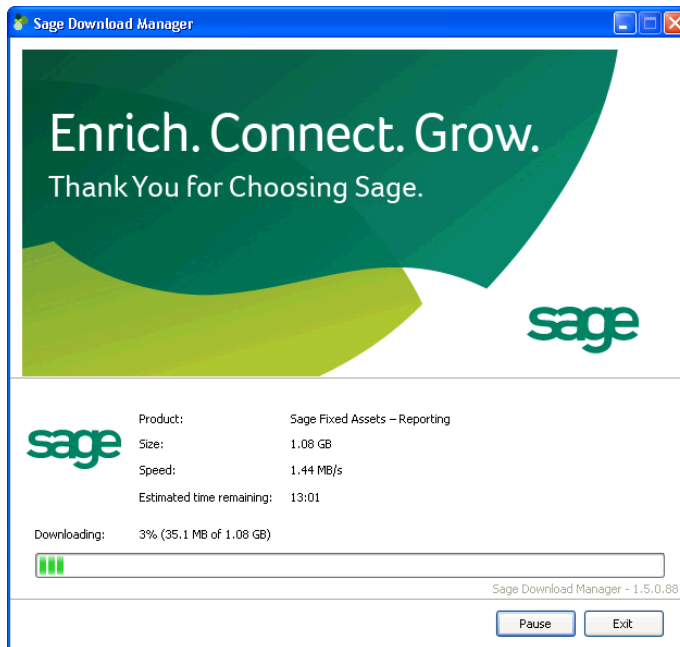
To start the install program

1. Point your browser to the Sage Customer Portal at:
<https://customers.sagenorthamerica.com>.
2. Click the Logon link and enter your Customer Logon information.

3. Click the Product Downloads link. The system opens a web page with downloads for system requirements, Sage Fixed Assets products, and their installation guides.
4. Click the Download link for the Reporting Stand-Alone Desktop Edition.
5. Click the Run button when prompted to either Run or Save the file. The system displays the Sage Download Manager dialog.

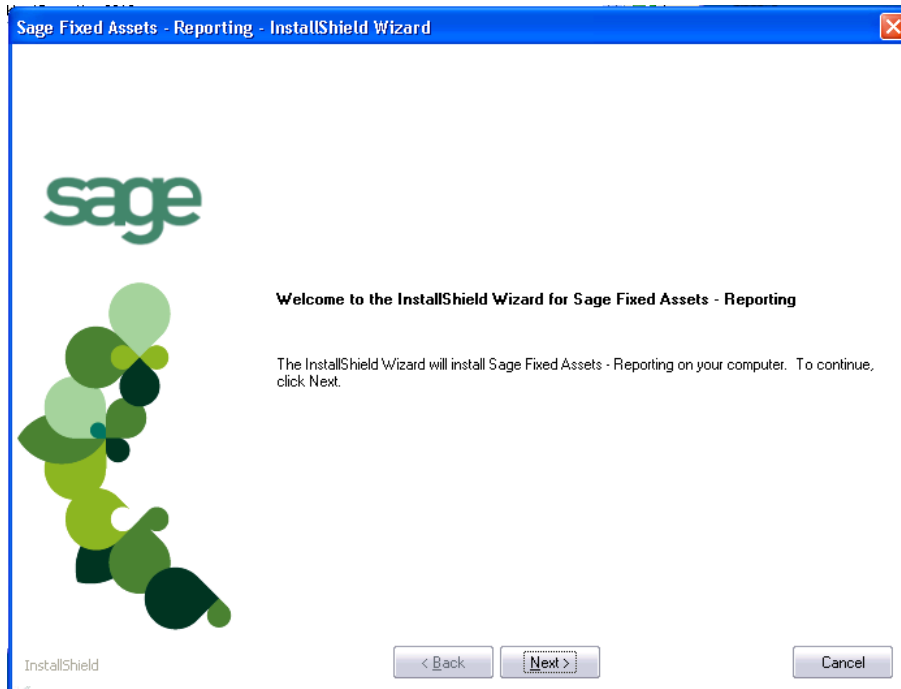


6. Click OK. The system begins to download the file.

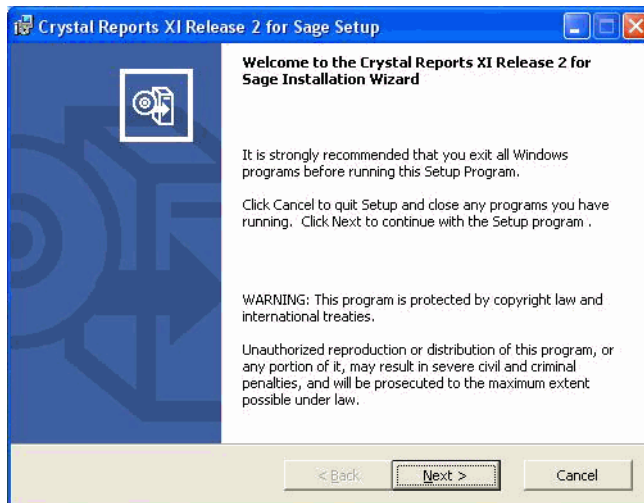


The system prompts you to install Sage Advisor Update.

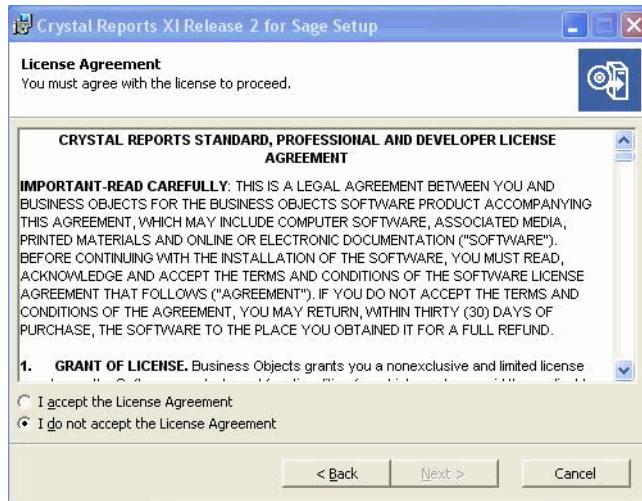
7. Click the Install button. The system installs Sage Advisor Update and then displays the Welcome dialog. (You may need to restart your machine.)



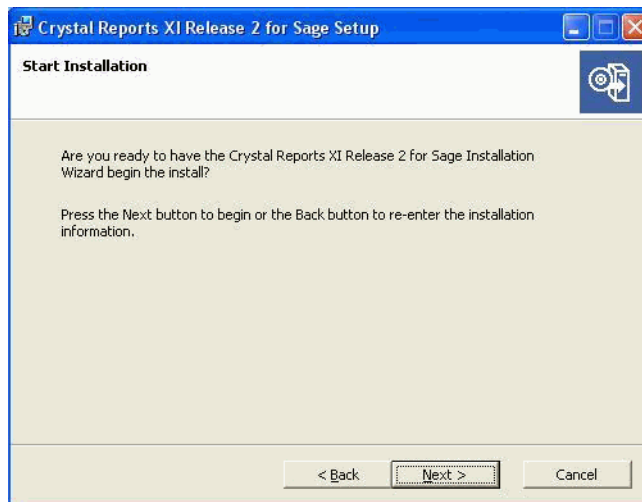
8. Click the Next button. The system displays the Crystal Reports Welcome dialog.



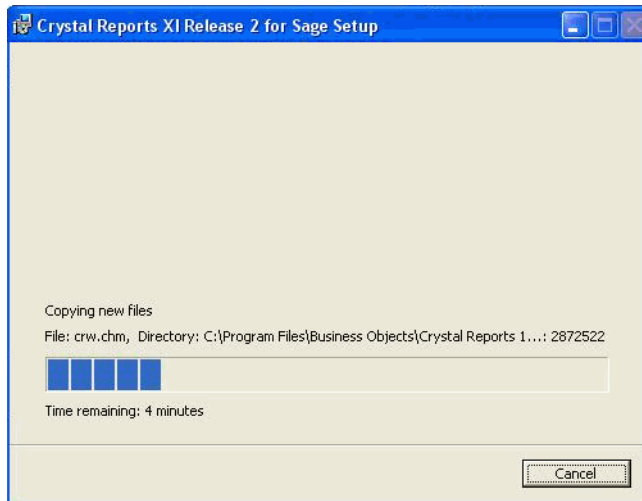
9. Click the Next button. The system displays the License Agreement.



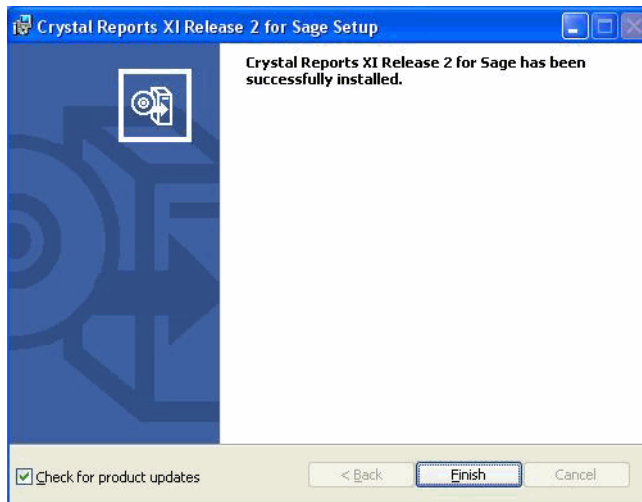
10. Click the I Accept the License Agreement option button, and then click the Next button. The system displays the Start Installation dialog.



11. Click the Next button. The system begins installing the software.



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



12. Clear the Check for Product Updates button.
13. Click the Finish button. The system returns to the installation dialog.
14. Click the Exit button to close the dialog.

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

Appendix A

How to Contact Us

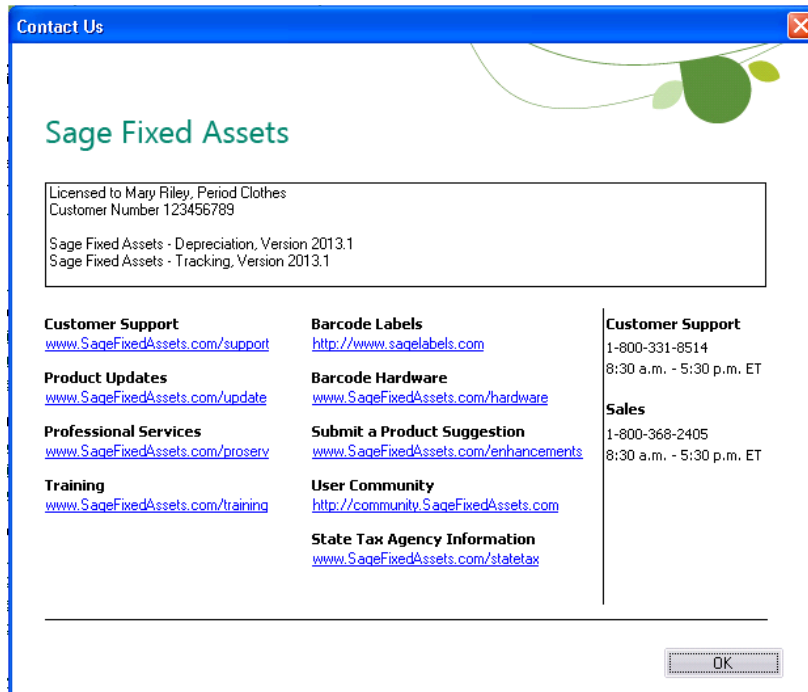
Here are some of the quickest ways to contact us if you have a question about operating the program, or if you need assistance in purchasing a Sage Fixed Assets product.

Customer Support	Phone: 800-331-8514 (8:30 a.m.—5:30 p.m. ET) FAX: 866-856-6844 (24 hours) email: FixedAssetsSupport@sage.com website: www.SageFixedAssets.com/support Customer number required
Sales	800-368-2405 (8:30 a.m.—5:30 p.m. ET) To enroll in or renew Sage Business Care
Website	www.SageFixedAssets.com

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

To contact Sage Fixed Assets

1. Select Help/Contact Us from the menu bar. The Contact Us dialog appears.



2. Click on a link to receive customer support, find information about training opportunities, view online demos of our products, purchase barcode labels or barcode hardware, or to send us a product suggestion.

Appendix B

Troubleshooting

In this appendix:

Moving and Reconfiguring Databases B-1

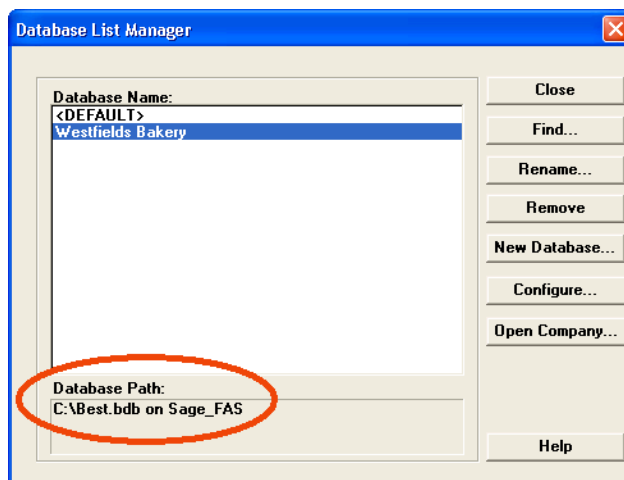
Moving and Reconfiguring Databases

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

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

To determine if you need to move your databases

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

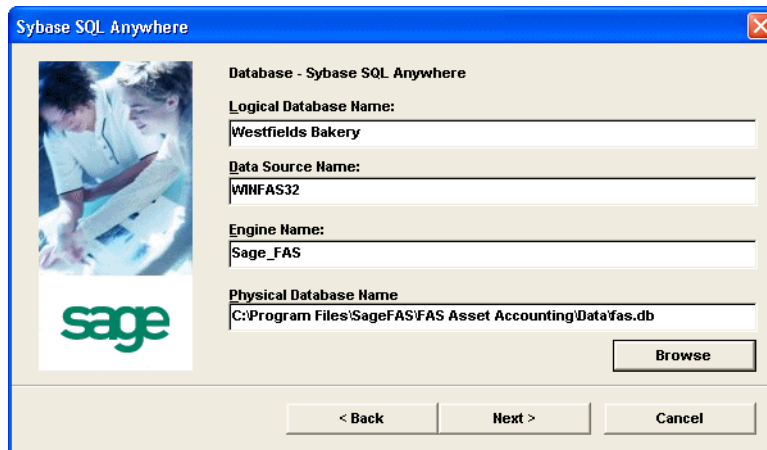


2. Select each database and review the Database Path information to determine the location of the physical database file.
3. If the database file is located in C:\Program Files\SageFAS or any other non-virtualized location outside of My Documents, then close the application. You are ready to install the latest version and operate the program under Windows Vista or Windows 7.
4. If the database is located in a virtualized location (i.e., C:\Windows or C:\Program Files), or a folder within My Documents, you will need to move the database. Close the application and continue with step 5 below.

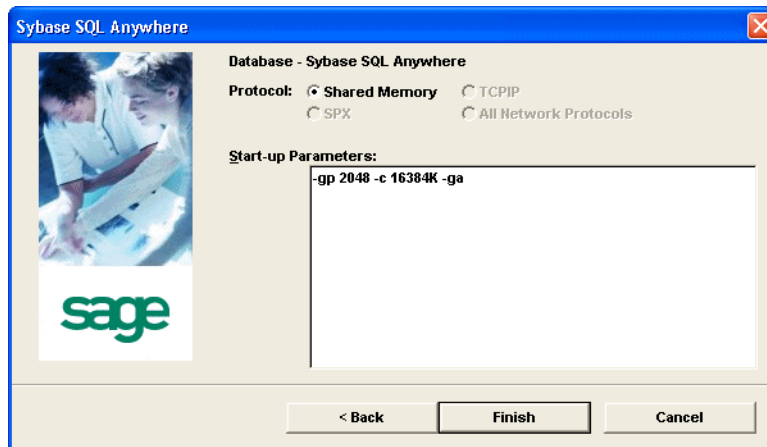
If databases are in an unsupported Windows Vista or Windows 7 location

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

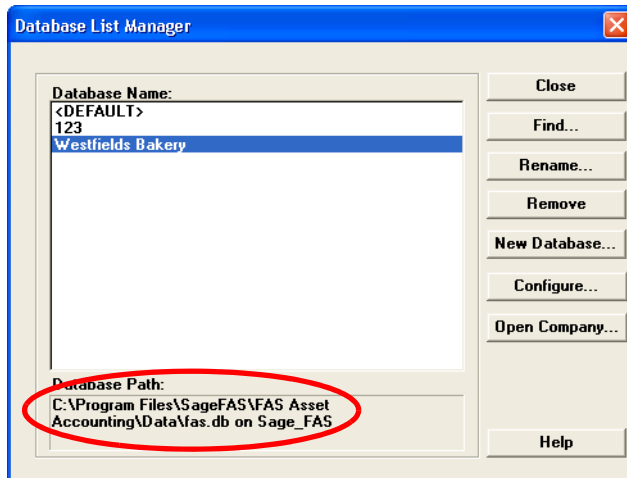
5. Open your Sage Fixed Assets application and access Database List Manager.
6. Select the database that has been moved to a new location and click the Configure button.



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



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



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

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