



Sage Residential Management

Versions 9.5 through 14.1

Installation Guide

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Section 1: New Sage Residential Management Installation

You must install Sage 300 Construction and Real Estate Accounting and Management products version 14.1 **before** you install Sage Residential Management version 14.1. If you also purchased Sage Estimating, also install Sage Estimating version 14.1 before you install Sage Residential Management version 14.1.

Installation steps for the server that will host Residential Management data or a standalone workstation

A. Prepare to install to the server or standalone workstation

1. The Residential Management application uses Crystal Reports components that come with the Sage 300 Construction and Real Estate Accounting and Management products. Before you install Residential Management 14.1, you must install Accounting and Management Products 14.1 to each computer that will have Residential Management. (This does not include remote workstations, to which you do not install Residential Management.)
2. If you have other applications that use Microsoft Database Engine or Structured Query Language (SQL) database engines, make sure that the database engines are compatible. For more information, see ["Minimum System Requirements" on page 17](#)
3. Quit all programs and services for the duration of the installation. This includes programs that run in the background such as antivirus, e-mail, backup, and virtual firewall programs.
4. If you set up Residential Management on a network, set up a user or group named **RmsAdmins** in the active directory on the domain server. This RmsAdmins user or group must have full network administrative rights.
5. Have a copy of the Residential Management 14.1 software notice available. The notice provides instructions and a link for downloading the Residential Management installation files.

B. Open the RM Setup Main Menu at the Server or Standalone Workstation

1. Log on with administrative rights.
2. Download the Residential Management installation files to your server in accordance with the software notice instructions.
3. In the resulting RM installation folder, browse for the **Setup.htm** file and double-click it to open the **RM Setup Main Menu** window.

C. Install Residential Management at the Server or Standalone Workstation

1. From the **RM Setup Main Menu**, click **2. Install RM Program Files**.
2. In the **File Download** window, click **[Open]**.
3. In the **Residential Management - InstallShield Wizard** window, click **[Next]**.

4. Type your user name and organization, select **Anyone who uses this computer (All Users)**, and click **[Next]**.
5. Make sure that **C:\RM** appears as the destination folder (C: represents your local drive) and click **[Next]**.
6. Select **Typical** as the **Setup Type** and click **[Next]**
7. Click **[Next]** and click **[Install]**. The installation may take several minutes.
8. Close the **RM Setup Main Menu** window.

D. Install SQL Server Express to the server or standalone workstation

If you have already installed Microsoft SQL Server 2005 or Microsoft SQL Server 2005 Express to your server and you have a SAGERM instance, skip to [“E. Ensure remote connections are allowed on the server” on page 3.](#)



NOTE: If you are installing SQL Server Express on a Windows Server 2008 or Windows 7 operating system, you will need to install Microsoft SQL Server 2005 Express Edition Service Pack 4 from the Microsoft website:

<http://www.microsoft.com/en-us/download/details.aspx?id=184>

For SQL Server 2005 Express Edition installation:

1. Using Windows Explorer, browse to **C:\RM\RMDatabase** (C: represents your RM install location). If you are installing Microsoft SQL Server 2005 Express Edition Service Pack 4, browse to the location where you downloaded it.
2. Click **SQLEXPR.EXE** (or **SQLEXPR32.EXE** for 32-bit operating systems).
3. After reading the End User License Agreement, select **I accept the licensing terms and conditions**, and then click **[Next]**.
4. In the **Installing Prerequisites** window, click **[Install]** to begin the installation.
5. When you see "The required components were installed successfully" message, click **[Next]**.
6. In the **Welcome to the Microsoft SQL Server Installation Wizard** window, click **[Next]**.
7. In the **System Configuration Check** window, confirm that all actions were successful, and then click **[Next]**.
8. In the **Registration Information** window, after entering your registration information, clear the **Hide advanced configuration options** check box, and then click **[Next]**.
NOTE: You must clear the **Hide advanced configuration options** check box to perform the remaining steps.
9. In the **Feature Selection** window, click **[Next]**.
10. In the **Instance Name** window, select **Named instance**, type **SAGERM** for the named instance, and then click **[Next]**.

11. If this is a domain server, in the **Service Account** window select **Use a domain user** and then type your user name, password, and domain in the appropriate boxes. If there is no domain, select **Local system**. Select the **SQL Server** and **SQL Browser** services boxes at the bottom of the window. Then click **[Next]**.
12. In the **Authentication Mode** window, select the following:
 - a. Select **Mixed Mode** (Windows Authentication and SQL Server Authentication).
 - b. Enter and confirm the password for sa logon (system administrator logon).
NOTE: It is important to make note of this password as it may be required when you perform database maintenance.
 - c. Click **[Next]**.
13. In the **Collation Settings** window, select **SQL collations (used for compatibility with previous versions of SQL Server)**. Ensure that **Dictionary order, case-insensitive, for use with 1252 Character Set** is selected (this is the default), and then click **[Next]**.
14. In the **Configuration Options** window, select **Enable User Instances**, and then click **[Next]**.
15. In the **Error and Usage Report Settings** window, click **[Next]**.
16. In the **Ready to Install** window, click **[Install]**.
17. When the setup is finished, click **[Next]**.
18. In the **Completing Microsoft SQL Server 2005 Setup** window, click **[Finish]**.

E. Ensure remote connections are allowed on the server



NOTE: These steps are not required for a standalone workstation.

1. In the Windows task bar, select **Start > Programs > Microsoft SQL Server 2005 > Configuration Tools > SQL Server Surface Area Configuration**.
2. Select **Surface Area Configuration for Services and Connections**.
3. Under **SAGERM**, expand **Database Engine**, then select **Remote Connections**.
4. Select **Local and remote connections**, then select **Using both TCP/IP and named pipes**.
5. Click **[Apply]** then **[OK]**.
6. When the “Changes to Connection Settings will not take effect until you restart the Database Engine service” message appears, click **[OK]**.
7. Exit the **SQL Server Surface Area Configuration** window.
8. In the Windows task bar, select **Start > Programs > Microsoft SQL Server 2005 > Configuration Tools > SQL Server Configuration Manager**.
9. Select **SQL Server 2005 Services**.
10. Select **SQL Server (SAGERM)**.
11. Select **Restart Service** or right-click and select **Restart**.
12. Exit the **SQL Server Configuration Manager** window.

F. Create the RM sample database (RM_Demo)

You can create sample data to use with Residential Management. This process also creates the necessary logins for SQL so this is a required step.

1. Browse to your C:\RM\RMDatabase folder and double-click **RMDatabase.exe**.
2. **RM_Demo** should appear in the **Database Name** field.
3. Click [**Create**] and then click [**OK**].
4. In the **Login Info** window, enter your sa login and password, and then click [**Accept**].
5. A message appears when the database has been created. Click [**OK**].
6. Click [**Upgrade**] and then click [**OK**].
7. In the **Login Info** window, enter your sa login and password, and then click [**Accept**].
8. A message appears when the database has been upgraded. Click [**OK**].
9. Click [**Exit**].

G. Update Shortcut Properties

Perform the steps in this section only if you are using RM for the first time or if you have not set up security in RM.

1. Right-click the RM icon on your desktop, and select **Properties**.
2. Click the **Shortcut** tab. Verify that the **Target** field displays C:\RM\RM.exe (C: represents your local drive).
3. In the **Target** field, place your cursor at the end of the path. Enter a space, and then type **RmsAdmins**. The **Target** field should read "C:\RM\RM.exe" RmsAdmins.
4. Click [**Apply**], and then click [**OK**].

H. Start Residential Management



NOTE: Ensure you start Sage 300 Construction and Real Estate before starting Residential Management to allow the Sage System Verifier to perform system verification. If you do not start Sage 300 Construction and Real Estate before starting Residential Management, you will receive a "cannot find SQL servers" error message. If you receive this message, close Residential Management, start Sage 300 Construction and Real Estate and allow the Sage System Verifier to run, and then try starting Residential Management again.

1. Launch the RM icon that was just updated in step "G. Update Shortcut Properties."
2. If you see a message concerning the NT group, click [**OK**].

3. Select or enter the SQL server name. On the server that hosts the data or a stand-alone workstation, the SQL server name will be **(local)\SAGERM**.
4. Select the database that you want to use. If Residential Management does not find a database, follow the instructions in ["Appendix A: Reset the Registry" on page 19](#).
5. Select the property that you want to use. The **Residential Management** window appears.

Installation Steps for Workstations or Terminal Servers (not hosting the data)

A. Prepare to Install

1. The Residential Management application uses Crystal Reports components that come with the Sage 300 Construction and Real Estate Accounting and Management products. Before you install Residential Management 14.1, you must install Accounting and Management Products 14.1 to each computer that will have Residential Management.
2. Log on to the workstation as an administrator.
3. Quit all programs and services for the duration of the installation. This includes programs that run in the background such as antivirus, e-mail, backup, and virtual firewall programs.
4. The workstation user or operator must have workstation administrative rights in order to use Residential Management.

B. Open the RM Setup Main Menu

1. Download the Residential Management installation files to your workstation or terminal server in accordance with the software notice instructions or copy them from a shared location if they were previously downloaded to a shared location.
2. In the resulting RM installation folder, browse for the **Setup.htm** file and double-click it to open the **RM Setup Main Menu** window.

C. Install Residential Management

1. From the **RM Setup Main Menu**, click **2. Install RM Program Files**.
2. In the **File Download** window, click **[Open]**.
3. In the **Residential Management - InstallShield Wizard** window, click **[Next]**.
4. Type your user name and organization, select **Anyone who uses this computer (All Users)**, and click **[Next]**.
5. Make sure that **C:\RM** appears as the destination folder (C: represents your local drive) and click **[Next]**.
6. Select **Typical** as the **Setup Type** and click **[Next]**.
7. Click **[Next]** and click **[Install]**. The installation may take several minutes.
8. Close the **RM Setup Main Menu** window.

D. Install SQL Server Express



NOTE: If you are installing SQL Server Express on a Windows Server 2008 or Windows 7 operating system, you will need to install Microsoft SQL Server 2005 Express Edition Service Pack 4 from the Microsoft website. <http://www.microsoft.com/en-us/download/details.aspx?id=184>

For SQL Server 2005 Express Edition installation, do the following:

1. Using Windows Explorer, browse to **C:\RM\RMDatabase** (C: represents your RM install location). If you are installing Microsoft SQL Server 2005 Express Edition Service Pack 4, browse to the location where you downloaded it.
2. Click **SQLEXPR.EXE** (or **SQLEXPR32.EXE** for 32-bit operating systems).
3. After reading the End User License Agreement, select **I accept the licensing terms and conditions**, and then click **[Next]**.
4. In the **Installing Prerequisites** window, click **[Install]** to begin the installation.
5. When you see "The required components were installed successfully" message, click **[Next]**.
6. In the **Welcome to the Microsoft SQL Server Installation Wizard** window, click **[Next]**.
7. In the **System Configuration Check** window, confirm that all actions were successful, and then click **[Next]**.
8. In the **Registration Information** window, after entering your registration information, clear the Hide advanced configuration options check box, and then click **[Next]**.
NOTE: You must clear the Hide advanced configuration options check box to perform the remaining steps.
9. In the **Feature Selection** window, select **Client Components** and **Connectivity Components**. Then click **[Next]**.
10. In the **Instance Name** window, select **Named instance**, type **SAGERM** in the named instance box, and then click **[Next]**.
11. In the **Service Account** window, select **Network service**. Mark the **SQL Server** and **SQL Browser services** boxes at the bottom of the window. Then click **[Next]**.
12. In the **Authentication Mode** window, select the following:
 - a. Select **Mixed Mode (Windows Authentication and SQL Server Authentication)**.
 - b. Enter and confirm the password for sa logon (system administrator logon).
NOTE: It is important to make note of this password as it may be required when you perform maintenance.
 - c. Click **[Next]**.
13. In the **Collation Settings** window, select **SQL collations (used for compatibility with previous versions of SQL Server)**. Ensure that **Dictionary order, case-insensitive, for use with 1252 Character Set** is selected (this is the default), and then click **[Next]**.
14. In the **Configuration Options** window, select **Enable User Instances**, and then click **[Next]**.
15. In the **Error and Usage Report Settings** window, click **[Next]**

16. In the **Ready to Install** window, click [**Install**]
17. When the setup is finished, click [**Next**].
18. In the Completing Microsoft SQL Server 2005 Setup window, click [**Finish**].

E. Update Shortcut Properties

Perform the steps in this section only if you are using RM for the first time or if you have not set up security in RM.

1. Right-click the RM icon on your desktop, and select **Properties**.
2. Click the **Shortcut** tab. Verify that the **Target** field displays **C:\RM\RM.exe** (C: represents your local drive).
3. In the **Target** field, place your cursor at the end of the path. Enter a space, and then type **RmsAdmins**. The **Target** field should read "C:\RM\RM.exe" RmsAdmins.
4. Click [**Apply**], then click [**OK**].

F. Start Residential Management



NOTE: Ensure you start Sage 300 Construction and Real Estate before starting Residential Management to allow the Sage System Verifier to perform system verification. If you do not start Sage 300 Construction and Real Estate before starting Residential Management, you will receive a "cannot find SQL servers" error message. If you receive this message, close Residential Management, start Sage 300 Construction and Real Estate and allow the Sage System Verifier to run, and then try starting Residential Management again.

1. Launch the RM icon that was just updated in step "E. Update Shortcut Properties".
2. If you see a message concerning the NT group, click [**OK**].
3. Select or enter the SQL server name. On a workstation or terminal server, the SQL server name will be [server name]\SAGERM. For example if the name of the server that hosts the data is DATASERVER, the SQL server name will be DATASERVER\SAGERM.
4. Select the database that you want to use. If Residential Management does not find a database, follow the instructions in ["Appendix A: Reset the Registry" on page 19](#).
5. Select the property that you want to use. The **Residential Management** window appears.

Section 2: Upgrade Sage Residential Management

You must upgrade Sage 300 Construction and Real Estate Accounting and Management products to version 14.1 **before** you upgrade Residential Management to version 14.1. If you also have Sage Estimating installed, also upgrade Sage Estimating to version 14.1 before you upgrade Residential Management to version 14.1.

Supported Upgrade Paths

You can upgrade to Sage Residential Management version 14.1 from Residential Management 9.4.0 or later.

Upgrade Steps

A. Prepare to Upgrade

1. The Residential Management application uses Crystal Reports components that come with Sage 300 Construction and Real Estate Accounting and Management products. Before you upgrade to Residential Management 14.1, you must install or upgrade to Accounting and Management Products 14.1 on each computer that will have Residential Management. (This does not include remote workstations, to which you do not install Residential Management.)
2. Back up your Residential Management data files.
3. If you have other applications that use Microsoft Database Engine or Structured Query Language (SQL) database engines, make sure that the database engines are compatible. For more information, see ["Section 4: Creating a new Sage Residential Management Database File."](#)
4. If you have MSDE version 1, MSDE version 2, SQL Server version 7, or SQL Server 2000 installed, follow the instructions in the *Moving Data Files* document before you upgrade. This and other guides are available on the [Product Documents website](#).
5. If you are upgrading from version 9.4, follow the steps in Section 1 for a new installation. If you are upgrading from version 9.5 or later, continue with the steps below.
6. If you plan to upgrade a network installation, ask all operators to close Residential Management for the duration of the installation
7. Quit all programs and services for the duration of the installation. This includes programs that run in the background such as antivirus, e-mail, backup, and virtual firewall programs.
8. Have a copy of the Residential Management version 14.1 software notice available. The notice provides instructions and a link for downloading the Residential Management installation files.

B. Open the RM Setup Main Menu

Perform the steps in this section on all servers, terminal servers and workstations that use Residential Management.

1. Download the Residential Management installation files to your server, terminal server, or workstation in accordance with the software notice instructions or copy them from a shared location if they were previously downloaded to a shared location.
2. In the resulting RM installation folder, browse for the **Setup.htm** file and double-click it to open the **RM Setup Main Menu** window.

C. Upgrade Residential Management

Perform the steps in this section on all servers, terminal servers and workstations that use Residential Management.

1. From the **RM Setup Main Menu**, click **2. Install RM Program Files**.
2. In the **File Download** window, click [**Open**].
3. In the **Residential Management - InstallShield Wizard** window, click [**Next**]. The installation of the upgrade may take several minutes.
4. Type your user name and organization, select **Anyone who uses this computer (All Users)**, and click [**Next**].
5. Make sure that C:\RM\ appears as the destination folder (C: represents your local drive) and click [**Next**].
6. Select **Typical** as the **Setup Type** and click [**Next**].
7. Click [**Next**] and click [**Install**]. The installation may take several minutes.
8. Close the **RM Setup Main Menu** window.

D. Upgrade Residential Management Data Files

Perform these steps on the computer that hosts your Residential Management data files. If you have more than one database that you use with Residential Management, repeat these steps for each database.

1. Browse to your C:\RM\RMDatabase folder and double-click **RMDatabase.exe**.
2. In the **RM Data Installation** window, change the **Data Location** to the directory where the RM data resides, if necessary.
3. Change the name in the **Database Name** field to the name of your database to be upgraded.
4. Click [**Upgrade**] and then click [**OK**].
5. In the **Login Info** window, enter your sa login and password, and then click [**Accept**].
6. A message appears when the database has been upgraded. Click [**OK**].
7. Repeat for any additional databases to be upgrade.
8. When finished, click [**Exit**].

E. Update Shortcut Properties

Perform the steps in this section on all servers, terminal servers and workstations that use Residential Management and if you have not set up security in RM.

1. Right-click the RM icon on your desktop, and select **Properties**.
2. Click the **Shortcut** tab. Verify that the **Target** field displays **C:\RM\RM.exe** (C: represents your local drive).
3. In the **Target** field, place your cursor at the end of the path. Enter a space, and then type **RmsAdmins**. The **Target** field should read "C:\RM\RM.exe" RmsAdmins.
4. Click [**Apply**], then click [**OK**].

F. Start Residential Management

Perform the steps in this section on all servers, terminal servers and workstations that use Residential Management.



NOTE: Ensure you start Sage 300 Construction and Real Estate before starting Residential Management to allow the Sage System Verifier to perform system verification. If you do not start Sage 300 Construction and Real Estate before starting Residential Management, you will receive a "cannot find SQL servers" error message. If you receive this message, close Residential Management, start Sage 300 Construction and Real Estate and allow the Sage System Verifier to run, and then try starting Residential Management again.

1. Double-click the RM icon that was just updated in step E.
2. If you see a message concerning the NT group, click [**OK**].
3. Select or enter the SQL server name.
 - On the server that hosts the data or a stand-alone workstation, the SQL server name will be (local)\SAGERM.
 - On a workstation or terminal server, the SQL server name will be [server name]\SAGERM. For example if the name of the server that hosts the data is DATASERVER, the SQL server name will be DATASERVER\SAGERM
4. Select the database that you want to use. If Residential Management does not find a database, follow the instructions in ["Appendix A: Reset the Registry" on page 19](#).
5. Select the property that you want to use. The **Residential Management** window appears.

Section 3: Migrate Sage Residential Management to a Different Server

A. Follow the instructions in Section 1 for a new installation on the new server

B. Detach the RM databases from SQL on the old server

Perform these steps on the old server that hosts your Residential Management data files. If you have more than one database that you use with Residential Management, repeat these steps for each database.

1. Browse to your C:\RM\RMDatabase folder and double-click **RMDatabase.exe**.
2. In the **RM Data Installation** window, change the **Data Location** to the directory where the RM data resides, if necessary.
3. Change the name in the **Database Name** field to the name of your database to be upgraded.
4. Click [**Detach**] and then click [**OK**].
5. In the **Login Info** window, enter your sa login and password, and then click [**Accept**].
6. A message appears when the database has been detached. Click [**OK**].
7. Repeat for any additional databases to be detached.
8. When finished, click [**Exit**].

C. Copy your RM databases from the old server to the new server

The default location for the RM SQL database depends on your operating system and may be one of the following:

- C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data
- C:\Program Files (x86)\Microsoft SQL Server\MSSQL.1\MSSQL\Data



NOTE: If you have multiple instances of SQL installed, your data may be in another MSSQL.[#] folder (MSSQL.2, MSSQL.3, etc.).

D. Attach your RM databases to the new server

Perform these steps on the new server that hosts your Residential Management data files. If you have more than one database that you use with Residential Management, repeat these steps for each database.

1. Browse to your C:\RM\RMDatabase folder and double-click **RMDatabase.exe**.
2. In the **RM Data Installation** window, change the **Data Location** to the directory where the RM data resides, if necessary.
3. Change the name in the **Database Name** field to the name of your database to be attached.
4. Click [**Attach**] and then click [**OK**].
5. In the **Login Info** window, enter your sa login and password, and then click [**Accept**].

6. A message appears when the database has been attached. Click **[OK]**.
7. Repeat for any additional databases to be attached.
8. When finished, click **[Exit]**.

E. Reset the Registry on the workstations

The registry key on the workstations (and terminal servers not hosting the data) will be set to the old server. Update the registry key HKEY_CURRENT_USER > Software > Timberline > Residential Management > ConnectionString to use the new server by performing the following steps:

1. Log in as the user on the workstation or terminal server, and then use Windows Explorer to browse to the C:\RM directory.
2. Double-click the file **ResetRegistry.vbs**. You will not see any action as a result of clicking this file.
3. Close the Windows Explorer.

F. Start Residential Management

Perform the steps in this section on all workstations and terminal servers that use Residential Management.



NOTE: Ensure you start Sage 300 Construction and Real Estate before starting Residential Management to allow the Sage System Verifier to perform system verification. If you do not start Sage 300 Construction and Real Estate before starting Residential Management, you will receive a “cannot find SQL servers” error message. If you receive this message, close Residential Management, start Sage 300 Construction and Real Estate and allow the Sage System Verifier to run, and then try starting Residential Management again.

1. Launch the RM icon.
2. If you see a message concerning the NT group, click **[OK]**.
3. Select or enter the SQL server name. On a workstation or terminal server, the SQL server name will be [server name]\SAGERM. For example if the name of the server that hosts the data is DATASERVER, the SQL server name will be DATASERVER\SAGERM.
4. Select the database that you want to use.
5. Select the property that you want to use. The Residential Management window appears.
6. You may receive a message “The Sage Timberline Office data folder field for [database name] is empty or does not contain a valid data folder. Please select a valid data folder. [RM0030]”. Click **[OK]** then click **[Browse]** to select the new location for the Accounting data.
7. You will receive a message “Warning! Changing the Sage Timberline Office Data Folder after processing has occurred may cause data inconsistencies. Are you sure you want to continue? [RM0012]”. If you have selected the correct Timberline Office folder for the Accounting date, click **[OK]**.
8. Click **[OK]**.

G. Update Residential Management settings, copy custom reports and RMToday

1. In Residential Management, from **Adv Setup**, select **System Settings**.
2. Update the **ReportDirectory** to the new location if necessary then click [**Save**].
3. Click [**Close**].
4. Copy any custom reports from the old server to the new server. Default report location is C:\RM\Reports (or as designated in the **ReportDirectory** in **Adv Setup > System Settings**), but you may have report designs saved in other locations. Reports saved in a different location will display the full path in the **Name** column from **Reports > Reports Manager**.
5. Copy the RMToday folder from the old server to the new server. The RMToday folder is located in the C:\RM directory.

Section 4: Creating a new Sage Residential Management Database File

Follow these steps to create the new Sage Residential Management database file.

1. Browse to the C:\RM\RM Database folder on the server.
2. In the **RM Database** folder, double-click the file **DBInstaller.ini** to open it in Notepad and change the file to the following.

[Defaults]

SERVER_NAME = "(local)\SAGERM

DATABASE_NAME = "RMEEmpty"

CD_MDF_PATH = "\RMEEmpty9_0.mdf"

CD_LDF_PATH = "\RMEEmpty9_0_log.ldf"

NOTE: The files in the **CD_MDF_Path** and **CD_LDF_Path** must be exactly the same in the DBInstaller.ini file as they are in the actual path in your system.

3. From the **File** menu, select **Save** and then click **Exit**.
4. In the **RMDatabase** folder, double-click the file **RMDatabase.exe**.
5. In **File Locations**, verify the **Server** and **Data Location** fields.
 - The **Server** field should point to the SAGERM instance.
 - The **Data Location** field should point to the root level of the data folder where your Residential Management data files are stored.
6. In the **Database Name** field, change **RMEEmpty** to the database name you want to create.
7. Click [**Create**] to create a new Residential Management database file.
8. In the **Database Installer** window, click [**OK**] to create the database.
9. In the **Login Information** window in the **Login** field, type your SQL sa login and password and click [**Accept**].
10. When the installation is complete, click [**OK**]. In the **RM Data Installation** window, click [**Exit**].

Section 5: Setting up Security

Sage Residential Management Security uses Active Directory on the Domain Server.

A. Create the RmsAdmins user group and other needed groups on the domain server.

1. Make sure that the RmsAdmins user group is setup on the domain server. The users in this group should have full admin rights. Typically the users in the group would be the network admin and any other users that will have full access in RM.

Note: The group should be a Global Group type.

2. All other RM users should be setup as users on this domain. All of these users must have full read/write access.



TIP: You may want to setup multiple groups on the domain where each group will be assigned specific options in RM Security. For example, you may have a group established where the users in this group would only have access to the functions under Traffic and Cash Receipts under Tasks. And then another group that has access to the functions under Leases, and so on. You would assign the users to those particular groups on the domain then assign the groups to the appropriate options in RM Security. This will make the management of RM Security much simpler because you would only need to add/remove users from the domain group instead of having to add/remove the user from each option in RM Security.

B. Launch RM with RmsAdmins in the Shortcut Properties

1. While logged into the domain and with RmsAdmins in the RM shortcut properties, launch Residential Management.
2. From the shortcut bar, select **Adv.Setup**.
3. Double-click **Security**. This may take a few minutes to open as it is loading all the users and groups from the domain.
4. In the left pane are the security categories (**Functions, Menu Items, Properties, Controls, Actions**). Beneath each category are items to which users and groups can be applied to grant them access to that item. Double-click a category to access the menus and items.
5. Select an item from the left pane. On the right pane, select the user or group to add. Click the left arrow button to add the user or group to the item. The middle pane will show the users and groups that have access to that item.
6. If you need to remove a user or group from an item, select the user or group from the middle pane and click the right arrow button to remove them from that item.
7. After all users and groups have been added/removed from the appropriate items, click **Save** then **Close**.

C. Remove Added Shortcut Properties

Once you have set up security in Residential Management, remove **RmsAdmins** from the Shortcut Properties.

1. Right-click the RM icon on your desktop, and select **Properties**.
2. In the **Target** field, delete **RmsAdmins**.
3. Click [**Apply**], and then click [**OK**].

Section 6: System Requirements

The hardware and software requirements below provide a guideline. For more detailed information, please contact your Sage business partner or sales representative.

Supported Operating Systems



CAUTION: Residential Management is not supported on the Windows 8, Windows 8.1, Windows Server 2012, or Windows Server 2012 R2 operating systems.

Operating System	Minimum Service Pack	Notes
64-bit operating systems		
Windows 2008 Server Small Business Server		NOTE: Within this document, "Window 2008 Server" refers to all supported editions unless noted specifically.
Windows 2008 Server Enterprise Edition	SP2	
Windows 2008 Server Standard Edition	SP2	
Windows 2008 Server R2 Enterprise Edition		
Windows 2008 Server R2 Standard Edition		
Windows 7 Professional	SP1	NOTE: Within this document, "Window 7" refers to all supported editions unless noted specifically.
Windows 7 Ultimate	SP1	
Windows 7 Enterprise	SP1	
Windows Vista Business	SP2	NOTE: Within this document, "Vista" refers to all supported editions unless noted specifically.
Windows Vista Ultimate	SP2	

Minimum System Requirements

- Microsoft SQL Server 2005 or Microsoft SQL Server 2005 Express

Processor

- 800 MHz PC

RAM

- 512 MB RAM for Windows Server 2003
- 256 MB RAM for Windows XP Professional

Hard Disk Space

- Remote workstation connected to a terminal server: 0 MB
- Workstation connected to a server in a local area network: 580 MB
- Server or stand-alone computer: 580 MB

Other Requirements

- Crystal Reports For Sage 2013 SP2 (if you plan to modify or create Crystal Reports designs)
- High-quality network interface card
- Sound card (Sound Blaster®-compatible)
- SVGA monitor (800 x 600 pixels, 1024 x 768 pixels (recommended for Project Management and Database Editor)
- Microsoft Internet Explorer 6.0 (Service Pack 1)
- Microsoft Outlook® (required to use email features)
- Printer
- WinFax Pro 10.0, 10.01, or 10.03 (required to send faxes in applications with this feature)

Supported Protocols

- TCP/IP Transmission Control Protocol/Internet Protocol. Microsoft servers default to this protocol.
- RDP 5 Remote Display Protocol. Microsoft remote protocol, which is used in its remote connection applications.
- ICA Independent Computing Architecture. Citrix remote protocol, which is used in its remote connection application.

Appendix A: Reset the Registry

If Residential Management does not find a database or is pointing to the wrong server, reset the registry.

1. Use Windows Explorer to browse to the C:\RM directory.
2. Double-click the file **ResetRegistry.vbs**. You will not see any action as a result of clicking this file.
3. Close the Windows Explorer window.
Note: Ensure you start Sage 300 Construction and Real Estate before starting Residential Management to allow the Sage System Verifier to perform system verification. If you do not start Sage 300 Construction and Real Estate before starting Residential Management, you will receive a “cannot find SQL servers” error message. If you receive this message, close Residential Management, start Sage 300 Construction and Real Estate and allow the Sage System Verifier to run, and then try starting Residential Management again.
4. Launch the RM icon.
5. If you see a message concerning the NT group, click **[OK]**.
6. Select or enter the SQL server name.
 - On the server that hosts the data or a stand-alone workstation, the SQL server name will be **(local)\SAGERM**.
 - On a workstation or terminal server, the SQL server name will be **[server name]\SAGERM**. For example if the name of the server that hosts the data is DATASERVER, the SQL server name will be DATASERVER\SAGERM.
7. Select the database that you want to use.
8. Select the property that you want to use. The **Residential Management window** appears.