

Sage DacEasy

- Getting Started Guide



sage

Sage DacEasy

Getting Started



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• Welcome to Sage DacEasy •

Welcome to Sage DacEasy Version 2012. Sage DacEasy offers a complete line of business software for the small to medium-size business in need of an affordable, yet powerful, solution.

For more than two decades, we have listened to our customers' suggestions to develop a robust business system with the features needed to successfully grow your business. Version 2012 continues this tradition by focusing on features designed to make you more productive.

This chapter gets you started using Sage DacEasy. Review the system requirements at: <http://www.sagedaceasy.com/Products-and-Services/Document-Library> before installing the program to ensure that your system can successfully run Sage DacEasy. If your system meets the minimum requirements, you can proceed with the instructions on installing Sage DacEasy and starting the program using the Sage DacEasy Business Center.

This chapter also includes a Conversion Preparation Checklist. If you are upgrading from a previous version, use this checklist to ensure that you have completed the preliminary steps required for a successful conversion. After completing the checklist you can follow the instructions for converting your data to Version 2012.

You must set up at least one company profile to access the Sage DacEasy Business Center. The profile stores the paths to all of your data files for a single company so that you can seamlessly access your company data, regardless of the module in which the data is stored. This chapter includes the steps to perform to add company profiles.

Installing Sage DacEasy



Note

If you are installing on a network, do not install the program until you read Chapter 3, "Networking." In addition, if you are upgrading from a previous version, read "Converting Data from a Previous Version" on page 7 before continuing with the following steps.

To Install Sage DacEasy

Review the system requirements at: <http://www.sagedaceasy.com/Products-and-Services/Document-Library> before installing Sage DacEasy.

- 1 Insert the CD in the appropriate drive. The Introduction screen automatically appears.

Be sure to close all programs including the Pervasive Database engine before installing Sage DacEasy.

If the Introduction screen does not automatically appear, click the **Start** button, and then select **Run**. Open the **Msetup.exe** file on the CD. The Introduction screen appears.

- 2 Click **Install Sage DacEasy**. The Setup program starts.

- 3 Follow the instructions on your screen to install Sage DacEasy.

If you are upgrading from a previous version of Sage DacEasy, pay close attention to the Upgrade Modifications screen when it appears. This screen allows Sage DacEasy to copy any necessary information to your new program folder and aids in converting any necessary data once you run the Version 2012 program. Using the options on this screen also helps locate your existing companies when using the Add Module wizard in the Sage DacEasy Business Center.

We recommend that you select the **View Readme File** check box during Setup. Read this file to familiarize yourself with the new features and learn about any last minute changes. After viewing this file, select **Close** from the **File** menu to exit the Readme file and return to Setup.

Adding and Removing Components

After you have installed Sage DacEasy, you can run Setup again at any time to add or remove components.

If you run Setup again, you also have the option to reinstall or remove the program. Select **Repair** from the Welcome screen to reinstall existing Sage DacEasy files. Select **Remove** to remove all installed components from your computer.

To Add or Remove Components

- 1** Insert the CD in the appropriate drive. The Introduction screen automatically appears.

If the Setup screen does not automatically appear, click the **Start** button, and then select **Run**. Open the **Msetup.exe** file on the CD. The Introduction screen appears.
- 2** Click **Install Sage DacEasy**. The Setup program starts.
- 3** Select the **Modify** option, and then click **Next**.
- 4** Follow the instructions on your screen to add new components or remove existing components.

Starting Sage DacEasy

The Sage DacEasy Business Center provides a single entry point for all Sage DacEasy programs. Fast and easy access to your program is only one of the many benefits gained when you use the Sage DacEasy Business Center.

Starting the Sage DacEasy Business Center is usually the preferred method of accessing company data; however, continue reading this section if you want to start Sage DacEasy independent of the Sage DacEasy Business Center.

You can use any of the following methods to start the Sage DacEasy Business Center:

- **From the Programs folder**—Click the **Start** button, point to **Programs**, point to **Sage DacEasy**, and then click **Sage DacEasy Business Center**.
- **From the desktop**—Sage DacEasy adds an icon to the desktop if you select this option during the Setup routine. If you selected this option, double-click the **Sage DacEasy Business Center** icon on your desktop to start the program.
- **From the Start menu**—Sage DacEasy adds an entry to the Start menu if you select this option during the Setup routine. If you selected this option, click the **Start** button, and then select **Sage DacEasy Business Center**.

After you start the Sage DacEasy Business Center, the next step depends on the type of user you are:

- **New Users**—If you are a new user, you must add a company profile. The first time you access the Sage DacEasy Business Center the **Welcome to Sage DacEasy** dialog box appears. Select an option from the screen. See "Adding New Company Profiles" on page 8 if you select to create a new profile. See "Opening Company Files" on page 14 if you select to add an existing profile. When the **Create New Profile User** dialog box appears, enter a user name and password. The password is optional. For more information on your profile user name, see "Setting Up a Security Passport" on page 12.
- **Upgrade Users**—If you are upgrading from a previous version, refer to "Converting Data from a Previous Version" on page 7.

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If you are not using the Sage DacEasy Business Center, you can access a Sage DacEasy module using the **Programs** folder on the **Start** menu. To access a Sage DacEasy module, click the **Start** button, point to **Programs**, point to **Sage DacEasy**, point to **Modules**, and then click the modules you want to access.



For steps on creating a shortcut to each Sage DacEasy module on your desktop, refer to the Sage DacEasy module's Help system.

If you are using the Sage DacEasy Business Center, the first time you select a task for a particular Sage DacEasy module, you are asked to activate the module. If you are not using the Sage DacEasy Business Center, the first time you access a Sage DacEasy module, you are asked to activate that module.

If you choose **Yes**, the **Product Activation** dialog box appears. Enter your serial number and activation key then click **OK**. Choose **No** if you want to activate the module at a later time. You will continue to receive this message each day when you access a module until you activate it; however, you are not required to activate until the trial period expires.



Sage will provide you with a serial number for each Sage DacEasy module that you purchase. You must activate the serial number(s) by visiting the Sage DacEasy Customer Portal or by calling the Customer Service department. Upon activation, Sage will provide you with an activation key for each module that you register.

Converting Data from a Previous Version

If you are upgrading from a previous version of Sage DacEasy, you must convert your data files to reflect the new file structure. When you add a company profile with existing Version 15 or later data files, Sage DacEasy converts the data files to Version 2012.

If you include multiple Sage DacEasy modules in the company profile, converting your data files from the Sage DacEasy Business Center helps ensure a successful conversion. Sage DacEasy converts the data files in the proper order after confirming that all steps required to successfully convert your data have been performed.



Note

If you are upgrading from a version prior to Sage DacEasy Version 15, you cannot convert directly to Version 2012. The files needed to convert to Version 2012 are included on the Sage DacEasy Version 2012 CD. To view the instructions, browse to the \\Utility\Convert folder and view the Readme.doc file in each of the applicable program subfolders. Follow the instructions in the Readme.doc file to convert to Version 15, and then complete the following steps to convert to Version 2012.

Before installing Version 2012, complete the following checklist to prepare your data files for conversion:

Conversion Preparation Checklist

- Post all transactions in Sage DacEasy Payroll, for each company. (This applies only if you are using Sage DacEasy Payroll.)
- Run the Recover and Verify file utilities on all files, in all Sage DacEasy programs, for each company.
- Back up all companies in all Sage DacEasy programs.
- Print all reports that are useful in verifying a successful conversion. For example, the Aging Reports for Accounts Receivable and Accounts Payable, Product History Report and Trial Balance are useful for verifying a successful Sage DacEasy Accounting conversion.
- Install Sage DacEasy Version 2012. It is strongly recommended you uninstall any prior versions of Sage DacEasy before installing 2012. Use the Uninstall Programs of the Control Panel to view and uninstall prior versions of Sage DacEasy.

After preparing your existing data files to be converted, you can begin the conversion process. When you add existing Version 15 or later data to your company profile, the Add Module wizard includes a Convert Files screen. From this screen, you have the option to delete previous data files after conversion. This conserves space on your hard disk drive. If you have a good backup of your data files, you do not need to keep these files. If you choose to keep the files on your hard disk drive, the data files remain in the same folder with new extensions, V15, V16, or V17 depending on the version you are upgrading from.

As Sage DacEasy converts your files, a status of the current file and record appears. After converting your files, the Recover process is automatically performed to convert the files to the correct file format. The length of time it takes to convert your files depends on the number of records in your data. The process normally only takes a few minutes, but expect longer times for large data files.

After converting your data, print your usual reports to verify a successful transfer of data. If your data appears as it should, you are ready to use your new software to process your daily entries. If your data is incomplete, contact Customer Support Services.

For more information on adding the data to a company profile, refer to the following section. If you would like to move your data folders to a new location after converting, see "Moving Your Data Files" on page 10.



Note

Important We strongly recommend that you use the Sage DacEasy Business Center to convert your data. If you do not use the Sage DacEasy Business Center, Sage DacEasy converts your files when you open the company in the Version 2012 module. If you are not using the Sage DacEasy Business Center and you are interfacing Sage DacEasy add-on modules with Sage DacEasy Accounting, it is imperative that you convert Sage DacEasy Accounting data files prior to converting your add-on module data files.

Adding New Company Profiles

You must add a company profile for each company you want to access through the Sage DacEasy Business Center. Company profiles identify the modules and data file location for each company profile.

You can include existing data or create new data when setting up company profiles. If you are upgrading from a previous version, refer to "Converting Data from a Previous Version" on page 7 prior to adding your profile. Complete the following steps to add a new company profile.

To Add a New Company Profile

- 1 Start the Sage DacEasy Business Center. Enter your user name and password on the **Company Profile Logon** dialog box.
- 2 Select **New** from the **Profile** menu. The **New Company Profile** dialog box appears.

If the Sage DacEasy Business Center is unable to locate an existing company profile, the **Welcome to Sage DacEasy** dialog box appears. Select the **Create New Profile** option, and then the **New Company Profile** dialog box appears.
- 3 Type a unique name to identify the company profile. This name is used to identify the company when opening your company profile from each computer and appears on the Sage DacEasy Business Center status bar.
- 4 The path will default to the local hard drive and profile. This folder stores information specific to the company profile; therefore, each profile must be located in a different folder.

When you add new data, the data files are stored in a subfolder in the profile's folder unless you change the default. For example, assume you type C:\Sage DacEasy\BC\Profiles\MyData as the profile path. If you add new accounting data, the default path is C:\Sage DacEasy\BC\Profiles\MyData\AC. We recommend that you accept the default structure to help organize your data files.
- 5 Complete all applicable fields in the Company Information area.
- 6 Click **Save**. The **Create New Profile User** dialog box appears.
- 7 Confirm your password and click **OK**. The **Add Module Wizard** appears.

If you are a new user, you must set up your user name. Entering and confirming your password is optional.
- 8 Follow the instructions on the screen to add the data files to the company profile. Use the **Back** and **Next** buttons to navigate through the wizard. Click **Finish** when you have completed the wizard.

You can browse for an existing company when you add your company data files. Click **Browse** and click **Existing companies** to locate existing Sage DacEasy company folders or click **Windows folders** to search all folders.

A Summary screen lists each module that will be added to the company profile. If you add existing data for multiple modules, you have the option to update the company information in each module with the company information entered for the profile. In addition, you must interface all modules in the profile with your Sage DacEasy Accounting data files.

A Complete screen appears when the selected modules have been added to the profile. Click **OK**. Sage DacEasy opens the profile and returns you to the Sage DacEasy Business Center main menu.

Moving Your Data Files

Each Sage DacEasy module installs into a subfolder in the destination folder selected during Setup. The default destination folder is labeled Sage DacEasy. If you converted existing Sage DacEasy data files to Version 2012, you might decide to move your data files to a folder in your new program folder. This allows you to keep all of your Sage DacEasy files in one central location.

The following steps explain how to move your files to a new location if you are using the Sage DacEasy Business Center. If you have not already set up a company profile, create a profile before completing these steps. See "Adding New Company Profiles" on page 8 for more information on adding company profiles.



If you are not using the Sage DacEasy Business Center, it is important that you first copy (not move) your data files to the new location, and then add the company in Sage DacEasy with the new path. If you have moved accounting data that is interfaced with Sage DacEasy add-on modules, you must update the interface path in the add-on modules. Afterwards, you can remove the company with the old path from Sage DacEasy, and then delete the files in the old folder from your hard disk drive. Refer to the *User's Guide* if you need assistance with adding or deleting companies.

To Move Your Data Files

- 1 Copy the data files from the existing folder to the new location. For example, if your accounting data files were located in C:\Dea4\Files, you will copy the contents of the "Files" folder to C:\DacEasy\BC\Profiles\mydatadirectory\AC.

If you are not familiar the procedure of moving files, refer to the documentation included with your operating system for assistance.

- 2 Select **Open** from the **Profile** menu in the Sage DacEasy Business Center, and then open the company profile that contains the data files you moved. An error appears, "Unable to locate Version 2012 data files."
- 3 Select the check box at the bottom of the screen to remove the modules from the company profile and click **Continue**.

If the check box is unavailable, you have to remove the profile, and then add the profile back to the Sage DacEasy Business Center with the correct paths to the module data. Refer to the "Removing Company Profiles", "Working With the Sage DacEasy Business Center" for more information on removing a profile.

- 4 Select **Edit** from the **Profile** menu, and then select **Add Module**. The **Add Module Wizard** appears. Select all modules for which the data files were moved and add the path to the new location.
- 5 Select **Edit** from the **Profile** menu, and then select **Company Information**. Click the **Paths** tab and confirm that each module is accessing the data files in the new location.

Exiting the Sage DacEasy Business Center

To exit the Sage DacEasy Business Center, choose **Exit** from the **Profile** menu. You can also exit the Sage DacEasy Business Center by clicking the **Close** button located on the Sage DacEasy Business Center title bar.

Any open windows remain open when you exit the Sage DacEasy Business Center. You can leave each Sage DacEasy module window open as needed. Close each window individually when you are done with the task by clicking the **Close** button.

Using the Sample Company

The sample company is data provided by Sage DacEasy to help you become familiar with the program. The sample data is stored in a Sampdata folder in each program folder unless you run a custom setup and do not select the Sample Company component. For example, the path to the accounting sample data is C:\Sage DacEasy\AC\Sampdata if you accepted the default path.

If you did not install the sample data but want to use it now, run the Setup routine again and select the **Modify** option. Select the **Sample Company** component for each module. Then, set up a profile for the sample company.

Opening the Sample Company

The first time you start the Sage DacEasy Business Center the **Welcome to Sage DacEasy** dialog box appears. To open the sample company profile, select the **Open sample profile** option. This automatically opens the sample company for you. Afterwards, select **Open** from the **Profile** menu, and then select **Sample Company** to open the sample company.

If you are an existing user of the Sage DacEasy Business Center and want to add the sample company, create a new profile pointing to the sample data for each module you want to use.

To set up the sample company if you are not using the Sage DacEasy Business Center, add a new company in the appropriate Sage DacEasy module. In the **Path** field, type the path to the sample company.

Setting Up a Security Passport

You are prompted for a user name and password the first time you open a company profile. The user name and password you add are stored as your *passport*.

The passport includes a *ticket* for each module in the company profile. The ticket can store the user ID and password for each module. Tickets are useful if you activated the Security feature in the modules. If you choose to store this information in your passport, you only have to enter a single user name and password when opening a company profile. When you select a Sage DacEasy function, Sage DacEasy applies the appropriate ticket. Sage DacEasy confirms that the user ID and password are valid, and that you have rights to the selected function.

If you are using the Security feature, you must provide a ticket to access each module. You can include the ticket with your passport or provide the ticket when you access the module.

Setting Up Passport Tickets

The following steps explain how to set up passport tickets. You are not required to set up passport tickets. However, if you choose not to set up passport tickets, the Enter Ticket dialog box appears the first time you access a module using the Security feature (during the current session of the profile). If you select the Update Passport check box on the Enter Ticket dialog box, the Passport is updated with the ticket information. If you clear the Update Passport check box, the Enter Ticket dialog box continues to appear the first time you access the module after opening the profile.

Note: You do not need to set up your passport if you added existing company data files to the profile and the company is using the Security feature. The Add Module wizard prompts you for your passport information before adding the company to the profile.

To Set Up Passport Tickets

- 1 Select Edit from the Profile menu, and then select Passport. The Edit Passport dialog box appears.
- 2 Type your User ID in the User Name field and password for each module in this company profile.

Note: Sage DacEasy Payroll's Security feature does not use User IDs; therefore, the User Name field is unavailable for Sage DacEasy Payroll.

- 3 Click Save to save your passport tickets.

Changing the Sage DacEasy Business Center Password

You assign a password to your passport the first time you add yourself as a new user. Complete the following steps if you want to change the password assigned to your passport. However, passwords are not required in the Sage DacEasy Business Center, so they may be left blank.

If you want to add a new user to an existing profile, type the new user name in the User Name field on the Open Company Profile dialog box, select the profile, and then click Open. You are prompted for the new user's password.

To Change the Sage DacEasy Business Center Password

- 1 Select **Edit** from the **Profile** menu, and then select **Passport**. The Edit Passport dialog box appears.
- 2 Type a new password in the Sage DacEasy Business Center area, and then confirm the entry.
- 3 Click **Save** to update your passport with your new password.

Setting the Controller Password

The controller is the only user that has access to the Company Profile User List dialog box. From this dialog box, you can view users, remove users, update a user's full name and add comments. Refer to the Sage DacEasy Business Center Guide, for more information on modifying user information.

To Set the Controller Password

- 1 Select **Edit** from the **Profile** menu, and then select **Users**. The Company Profile User List dialog box appears.

If the controller password has been saved, a password prompt appears. Type the controller password and click **OK** to continue.
- 2 Click **Set Password** in the Controller Password area. The **Set Password** dialog box appears.
- 3 Type the password, and then confirm the password.
- 4 Click **OK** to save your new password. The **Company Profile User List** dialog box appears.
- 5 Click **Cancel** to return to the Sage DacEasy Business Center.

Opening Company Files

One advantage of using the Sage DacEasy Business Center is that you do not have to close a profile before opening a different profile. If you have windows open for the current profile, and then open a different company profile, all new selections are for the most recently opened profile; however, you can still view windows opened from the previous profiles. The following steps explain how to open a different company profile.

The most recently opened company profiles are listed on the Profile menu. You can click any profile listed to quickly open the company.

To Open a Company Profile

- 1** Select **Open** from the **Profile** menu. The **Open Company Profile** dialog box appears.
- 2** Select the profile you want to open. If the profile is not listed, you can click **Browse** to locate the profile.
Click a column heading to sort on the corresponding column.
- 3** If you do not want to open the profile with the current user name, type a different user name in the User Name field.
If you want this profile to open each time you start the Sage DacEasy Business Center, click **Default**.
- 4** Click **Open**. The Sage DacEasy Business Center opens the selected profile.
If you opened the profile with a different User Name, you are prompted for your password information.

Additional Resources

Sage DacEasy provides a number of resources you can look to for assistance.

Documentation

The documentation set includes this Getting Started Guide, online Help which is available through the Help menu or by pressing F1, and User's Guides. Use these resources to discover the power of Sage DacEasy.

The User's Guide for each module is available in PDF format from the Sage DacEasy Business Center located under the Resources link on the navigation bar.

On-Site Support and Classroom Training

Certified Consultants are independent business specialists, trained and certified by Sage DacEasy to help you determine your business needs. Certified Consultants can tailor Sage DacEasy programs to fit your exact needs.

Many Certified Consultants offer both on-site and classroom training, and many are skilled in setting up and maintaining local area networks.

Call (800) 305-2556 or visit our web site at www.sagedaceasy.com to obtain a list of Certified Consultants in your area.

Online Support

If you have access to the World Wide Web, you can visit our free knowledgebase of articles on the Sage DacEasy web site: www.sagedaceasy.com.

Telephone Support

Sage DacEasy understands that your time is valuable. For fast answers to your questions, contact our Customer Support Services team. Customer Support Services has developed various resources to provide solutions for our customers. A description of Sage DacEasy telephone support options follows. Choose the option that best meets your needs.

Preparing for a Support Call

When you place a call to Sage DacEasy Customer Support Services, please help us make our support as efficient as possible by following these guidelines:

- Please be at your computer when you call for support. It is usually necessary to recreate the incident or walk through a series of steps to solve technical problems.
- If an error occurred during a posting or periodic routine, it is necessary to restore the backup, and then correct the error. Please have the data restored before you call the support lines.
- If you received an error message, it is important that you have the exact wording of the message and the area of the program in which it occurred.
- Gather information specific to your system. For steps on gathering system information, refer to the Help topic "Contacting Sage DacEasy."

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Networking

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• Networking •

This chapter provides general information about using Sage DacEasy on a network. Before you begin, make sure you have already purchased and successfully installed a Local Area Network (LAN). Refer to your Network Operating System manual or your network administrator if you have questions on installation, operation or usage of your LAN hardware or its operating system.

Before Installing Sage DacEasy

This section describes some options you can select during installation. This information is especially useful if running Sage DacEasy on a network. For more information on installing Sage DacEasy, refer to Chapter 1, "Welcome to Sage DacEasy."

Pervasive.SQL 10.01 Options

Sage DacEasy v2012 uses Pervasive SQL 10.01 as its record manager. To properly register the Pervasive engine, you must install the program at the server (or the computer that will store your Sage DacEasy data) as well as each of the workstations on the network. Installing the program to a remote computer results in improper installation.

Pervasive runs as a service when Windows starts. Pervasive SQL will always be running, even when you have not logged into Sage DacEasy.

General Networking Information

Network systems handle files differently than single user systems. The following sections explain some useful information on how the network version of Sage DacEasy operates.

Network Degradation

Some routines in Sage DacEasy are hard disk intensive. This means they read and write to the hard disk continuously. These include the Year End routines, data entry, File Utility routines and Posting routines. If you are using Sage DacEasy in a multiple user environment or if there are stations running other software programs, you may want to run these hard disk intensive routines during a slower period of the day. You are able to use other programs or work in another company while running these processes on another station, but due to their nature, the system may slow down drastically, depending upon the quality of your network hardware and software.

Concurrency Control Methods

In your everyday operation of the network version of Sage DacEasy, you share data files with others. At the precise time you attempt to update a record, another user may request and update the same record. The practice of two or more users reading from and writing to the same data files is called concurrency.

Network software automatically manages all concurrency issues for you. This concurrency control is handled internally, behind the scenes. The software may employ many different concurrency control methods.

Passive Concurrency

The most common concurrency control convention used by Sage DacEasy is passive concurrency. With this type of concurrency, any station may read and update data.

For example, a majority of the commands available on the **Edit** menu exercise passive concurrency control. If two stations read, and then try to update the same record, the last station to attempt the update receives an error stating that another user has already updated the record. After clearing the error message, the changes made by the first user appear on the second user's screen.

File Locking

File locking reserves an entire file for one user and the user has exclusive use of the file. Certain routines in Sage DacEasy, such as posting, request exclusive use of the files affected. If a routine uses file locking, it locks all of the necessary files before beginning the task. During this time, other stations cannot access routines that may use one of the locked files.

For example, when posting billing transactions, no user is allowed to access the **Edit Product** dialog box. Likewise, you are not able to post the billing transactions if another user has the **Edit Product** dialog box open. The same applies if someone has the **Edit Employee Accumulations** dialog box open, you cannot post your payroll transactions until the user exits the dialog box.

If a certain file is locked and you are accessing an operation that attempts to open the locked file, it returns an error that a file is currently locked by another station.

Record Locking

Record locking reserves one record within the data file for one user. The user has exclusive use of that record until the record is released. Most transaction entry routines in Sage DacEasy utilize record locking.

For example, if a user recalls a record, like a customer, for editing purposes, and a second user accesses the same record, the second user receives a record lock error. However, since this is not a file locking situation, the second user may enter or edit another customer.

Mapping the Subdirectories

It is very important that you map a drive that is common to all stations using Sage DacEasy. Mapping is the network process that allows you to access the server's drives as you would your own computer's. However, since your computer already has a C: drive, you must assign different letters or map the server's drives to avoid conflict. If you are unfamiliar with mapping techniques, consult your network operating system manual or your network administrator.

For server-to-peer networks, if the server path to Sage DacEasy is C:\[**Sage DacEasy data files folder**] and the workstations have that path mapped as F:, then users access the data files on the F drive, for example, F:\.

You must have a separate data file folder for each modules data files. For example, if you are using Sage DacEasy Accounting, Sage DacEasy Payroll and Sage DacEasy Order Entry and are operating two companies, you will have a total of six separate data file folders.

It is recommended that you install the program on the local drives of each workstation. This may help avoid mapping problems as well as increase the speed of the program. This is only possible for workstations with a local hard disk drive.

If you want to use a cache program, consult your network administrator for the best cache for your system.

Rights and Privileges

During the everyday operation of Sage DacEasy, the program creates and deletes various files. The creation and deletion of these files is invisible to the user, however, Sage DacEasy requires this for successful operation of the program. Because of this, you should assign Read, Write and Create privileges to each folder used by Sage DacEasy. If your network operating system accommodates them, also assign the folders Delete privileges. The applicable folders include the program folders, the program database folders, the data dictionary folder and each data file (company) folder. If you are unfamiliar with privilege assignments, consult your network operating system manual or your network administrator.

Updating the Company Path

If you are running Sage DacEasy in a network environment, you need to make sure the paths to the data files reflect the network drive. If you are upgrading from a single user version to the network version, be sure to update the company path to reflect the network drive. This allows each workstation to access the data files.



Note

If you are running the Sage DacEasy Business Center in a network environment, use the UNC (Universal Naming Convention) path when setting up the path to the data files in the company profile on the server and workstations.

When Using the Sage DacEasy Business Center

If you are upgrading from a single user version of Sage DacEasy to the network version and you are using the Sage DacEasy Business Center, you need to add a new company profile on each computer on the network running the Sage DacEasy Business Center. The company profile you are adding on each workstation and the server uses the UNC path to the data files on the server.



Note

If you moved your data files when upgrading from a single user version to a network version, you need to add a new company profile on the original computer to reflect the new network paths to the data files. When adding the new company profile, be sure to also set up the user names again.

To Add the New Company Profile

- 1 Start the Sage DacEasy Business Center and select **New** from the **Profile** menu. The **New Company Profile** dialog box appears.

If the Sage DacEasy Business Center is unable to locate an existing company profile, the **Welcome to Sage DacEasy** dialog box appears. Select the **Create New Profile** option, and the **New Company Profile** dialog box appears.
- 2 Type a unique name to identify the company profile. This name is used to identify the company when opening your company profile and appears on the Sage DacEasy Business Center status bar.
- 3 Type the path where the new company profile is to be located. This folder stores information specific to the company profile; therefore, each profile must be located in a different folder.
- 4 Complete all applicable fields in the Company Information area.
- 5 Click **Save**. The **Create New Profile User** appears.

- 6 Confirm your password, and then click **OK**. The **Add Module Wizard** appears.
- 7 Follow the instructions on the screen to point to the data files on the server. Use the **Back** and **Next** buttons to navigate through the wizard. Click **Finish** when you have completed all pages.

To browse for the existing data files folder on the server, click **Browse**, and then select **Windows folders**.

A Summary screen lists each module that will be added to the company profile.

A Complete screen appears when the selected modules have been added to the profile.

- 8 Click **OK**. Sage DacEasy opens the profile and returns you to the Sage DacEasy Business Center main menu.

If you are adding the new company profile on the original computer where the data files were located before they were moved to the network server, be sure to remove the old company profile pointing to the data files on the local disk drive.

When Not Using the Sage DacEasy Business Center

If you are upgrading from a single user version of Sage DacEasy to the network version and you are not using the Sage DacEasy Business Center, follow these steps. You need to update the data files path on the **Open Company** dialog box to reflect the network drive. This allows each workstation to access the data files.

To Update the Company Path

- 1 Select **Open** on the **File** menu. The **Open Company** dialog box appears.
- 2 Click **Add**. The **Add Company** dialog box appears. Complete the Identification Name field with a short description of your company and type the path to the data files on the server in the Path field. Click **OK** and a message appears stating that files already exist. Choose **Yes** to continue.
- 3 Select the company using the path to the data files on the server and click **Default**. This switches the new path to the default.
- 4 Select the company using the path to the local drive and click **Delete** to delete the path. This process removes the reference to the local drive from the **Open Company** dialog box; however, your data files are not affected. You will now use the new default company when you open your company's data files.



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