

SAGE MASTER BUILDER

Installation and License Administration Guide



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Chapter 1

Welcome to Sage Master Builder Installation

This chapter provides information about the following:

- Installation Overview
- Printed and Printable Documentation
- Customer Support Resources

Installation Overview

Welcome to Sage Master Builder version 13 installation

Welcome all new and returning customers to Sage Master Builder version 13 installation. You have made a good decision to purchase Sage Master Builder, the premiere construction business management tool.

We strongly recommend that you read the information contained in this book. Sage Master Builder can run in many different software and network environments, but there are important issues to take into consideration for each one. The more information you can gain about the installation process and how it relates to your software and network environment, the more likely your installation will proceed smoothly.

Program Enhancements

What's new in the latest release

For more information about each of these enhancements, see the “What's new in the latest release” topic to in the program Help after installation.

Program-wide drill down from reports

Sage Master Builder Version 13 features program-wide drill down functionality from most reports. You can run a report; and then from print preview, you can drill down to the data from which the report was built. In addition, most reports that you have edited or created using Sage Master Builder's Report Writer have drill down functionality automatically.

Email user authentication enabled

You can now set up your Internet service provider's (ISP) simple mail transfer protocol (SMTP) server name along with your user name and password to send email from Sage Master Builder.

Importance level and read receipt functionality in email

When emailing with Sage Master Builder, you have the options to set the email message's importance level and to request a read receipt. To use

these new features, however, your email service provider must support this functionality.

Add additional email addresses to a message

To provide more flexibility when emailing, now you can select recipients from the distribution list and also add additional email addresses to messages.

Email option to “Send a copy to my inbox”

The **Email Distribution** window has a check box so you can send a copy of an outgoing email message to your return address. The body of the email message includes a list of all the contacts selected to receive the message as well as any additional email addresses entered manually.

Option to save the bank reconciliation report

A new option is available when saving the final bank reconciliation that allows you to save the report as a PDF file in case the report needs to be reviewed or printed later.

Client entry now available for RFIs and Submittals

A client entry box has been added to **6-11-2 Requests for Information** and **6-11-4 Submittals** so that RFIs and Submittals may be addressed to clients. Entry in the **Client** and **Vendor** boxes on the **6-11-2 Requests for Information** and **6-11-4 Submittals** are mutually exclusive. Now you can save the records with a client or vendor, but not both. In addition, new reports and selection criteria have been added for RFIs and submittals. The “List by Job” reports now show the client.

Windows “Classic” theme is no longer required

Windows XP operating system used to require using the Window Classic desktop theme so that Sage Master Builder windows would not be clipped. Now you no longer need to use the Classic theme with any supported operating system, including Vista Business.

Help menu links to printable documentation

A new command, **Printable Documentation**, is on the **Help** menu on the Sage Master Builder main window to make it easier for you to locate

and print Sage Master Builder documentation that is in PDF format. For more information, see the Help topic “Printing Sage Master Builder printable documentation.”

Important:

You must have the Adobe® Reader® installed on your computer to view and print Sage Master Builder guides. To download this free software for viewing and printing documents in PDF format, visit <http://www.adobe.com/products/acrobat/readstep2.html>

Deleting subaccounts made easier

Previously, if you wanted to delete more than one subaccount for any given controlling account, you had to close the subaccounts window and re-open it so the **Delete** menu option became available again. Now you can delete as many subaccounts as needed without closing the subaccounts window between each one.

Easier access to the Sample Company

When opening the Sample Company, the **User Name and Password** window includes information stating that you can log in to the Sample Company using the user name **Supervisor** and that a password is not required.

More information now available about using the API

More information and two new topics are in the Sage Master Builder Help about using the Sage Master Builder API for integration with other products. The topics are named “Setting up a security group for using the API,” and “Setting up an API user and password.”

Help topics now include customer feedback links

Now you can submit opinions and comments about the usefulness of Help topics via links that are located at the end of each Help topic. You can submit a simple “Yes, this topic helped me,” or you can type and submit a comment by clicking the second link. Getting feedback from customers, business partners, and consultants will help guide future documentation enhancements.

“Total Wages” column renamed “Wages”

In the program area of **5-5 Daily Payroll** and **Daily Job Reports**, to improve drill down functionality and report accuracy, the **Total Wages** column has been renamed **Wages** and moved to a position after the **Premium** column. In addition, **Other Wages** has been renamed **Other Pay** and now includes **Pay Types 8** and **9** (**Misc.** and **Per Diem**).

Sage Master Builder Enterprise Edition Installation Information

The *Sage Master Builder Installation and License Administration Guide* now provides information about Enterprise Edition installation. If you are an Enterprise Edition customer, the Enterprise Edition Guide appears in the 7-Utilities section of the in-product Help and the installation information is located in Appendix I.

More “How?” links in the Help to assist you to complete complex tasks

Some complex tasks require that you first complete several additional tasks as steps in the process of completing the original task. “How?” links in Help provide easily accessible links directly to these related procedures. Look for the “How?” links in procedural steps and other locations within Help topics.

Modifications to the “Fax Line Access” area

Modifications have been made to the **Fax Line Access** area on the **7-2 Company Information** window to improve usability.

Audit error detection reports

Several new audit error reports have been added to Sage Master Builder to help Customer Support technicians identify the transactions related to some audit errors. These reports will save time diagnosing the problem in the event you discover audit errors that require Customer Support assistance to repair.

Convenient access to the Remote Assist Tool

The Remote Assist Tool allows Sage Customer Support representatives to access your systems and data remotely through your computer to

provide support services to you and your company. During a support call, you can quickly access the Remote Assist Tool from a Help menu link on the Sage Master Builder main page. Select **Help > Customer Resources > Technical Support > Remote Assist Tool**.

Sage System Verification utility

The Sage System Verification utility is installed to the \Program Files\Common Files\Sage\SSV folder with each Sage Master Builder installation. This utility assists with troubleshooting hardware issues related to the Sage licensing component.

New PDF and RTF drivers

New versions of the PDF and RTF drivers are now installed with Sage Master Builder Version 13. The new drivers resolve some customer issues.

Information about the MB7Tax.dll file added to the Help > About window

The version information about the MB7Tax.dll file allows easy reference to the tax table file that the program is currently using when payroll is computed.

Year-end Tax updates for Sage Master Builder Version 13

Included are updates to federal forms and other government-mandated changes for the 2007 tax year. Also included are updates to state payroll tax tables and federal income tax effective January 1, 2008.

For other details, on the main Sage Master Builder window, click **File > Help > Printable Documentation > Release Notes**.

Read This Before You Install

Where do I begin?

Before you begin installing Sage Master Builder version 13, we recommend that you review this list. It provides some very basic information about what to do before you begin installing Sage Master Builder software.

1. Gain an understanding of what's new about product installation by reading this book, by reading the *QuickStart Installation Guide*, and by reading the letter from your Business Partner.
2. Learn about the licensing process. Your Sage Master Builder license is managed by a the License Administration Tool and the Sage license server.
3. Before you start installation, locate the license file (in an email message) or your printed product keys. To activate your license, you must import a license file or enter product keys using the License Administration Tool.
4. If you are an existing customer, back up your company data before installing the software.

What information is in this book?

The rest of Chapter 1 “Welcome to Sage Master Builder Installation” provides more information about customer resources, such as:

- Other printed and printable guides
- The in-product Help system
- Contacts for Customer Support
- Sage Master Builder training
- Information about Business Partners and Sage Certified Consultants.

Chapter 2 presents technical information about “System Requirements and Configuration.” Sage Master Builder will not run correctly or not run at all on computers that do not meet the requirements, so before you install the software, be sure your computers meet the system requirements.

Chapter 3, “Installing Sage Master Builder,” provides detailed information and instructions for installing Sage Master Builder software in different environments.

Chapter 4, “Managing Your License with the License Administration Tool,” provides detailed information about:

- Setting the administrator password
- Managing and activating your license

- Creating group reservations
- Using the License Administration Tool.

Chapter 5, “License Use and Sage Master Builder,” provides all the necessary details about how the Sage license server manages your license attributes and how they are distributed to other computers running Sage Master Builder on your network. This information covers the concept of “license uses” in Sage Master Builder.

“Appendix A: Special Configuration” contains information about configuring specific operating systems and network environments. Are you working in a Terminal Services environment? You will find that information about installing and running Terminal Services in this appendix.

“Appendix B: Sage Master Builder API” contains overview information about running the Sage Master Builder API and working with third-party applications to extend Sage Master Builder’s capabilities. If you are a API software developer, then this chapter contains valuable information for you.

“Appendix C: Sage Master Builder Enterprise Edition Installation” contains detailed installation instructions for the Enterprise Edition of Sage Master Builder.

The “Glossary” provides definitions of commonly used terms that you will encounter as you install and run Sage Master Builder software. Do you need to know what a “server” is? You will find the definition in the Glossary.

Printed and Printable Documentation

Sage Master Builder Release Notes

The Release Notes document provides information about enhancements and previously reported issues in the software that have been resolved for the current release.

It also provides, where applicable, information and comments about recently discovered issues that have not yet been resolved before the latest software release. Release Notes are available in PDF format by

clicking **Help > Printable Documentation > Release Note** on the main Sage Master Builder window.

Sage Master Builder User Guide

The *Sage Master Builder User Guide* is a printable-PDF version of the Sage Master Builder Help. You will find that the Sage Master Builder User Guide is the most comprehensive yet. It provides extensive explanation of Sage Master Builder functions and tools as well as hundreds of procedures for completing tasks.

Click **Help > Printed Documentation** on the main Sage Master Builder window to see a list of printable documentation. Then click a document to open it with Adobe Reader.

Note:

The Sage Master Builder User Guide is a printable .pdf file of the in-product Help.

Getting Started: Sage Master Builder and Your Business

Getting Started: Sage Master Builder and Your Business provides basic information about key relationships in your business and how they interact with Sage Master Builder. This book also explores the Sage Master Builder's underlying concepts for working with general ledger, accounts payable, accounts receivable, and more. In addition, you will find detailed information about Sage Master Builder general operational features, accounting, analysis, payroll, accounts receivable, accounts payable, and more. If you are new to Sage Master Builder, we highly recommend that you read this book.

Click **Help > Printed Documentation** on the main Sage Master Builder window to see a list of printable documentation. Then click a document to open it with Adobe Reader.

Getting Started: Product Overview

Getting Started: Product Overview provides background information to help you understand the core functionality of Sage Master Builder and how to use it to manage your business. If you are new to Sage Master Builder, then we highly recommend that you read the specific background information about the tasks that you will perform. If you are

a company owner or administrator, we recommend that you read all the information in this guide.

Click **Help > Printed Documentation** on the main Sage Master Builder window to see a list of printable documentation. Then click a document to open it with Adobe Reader.

Sage Master Builder SDK Developer Guide

The *Sage Master Builder SDK Developer Guide* provides information about the installation and setup of the Sage Master Builder API. It is a development tool for programmers who are working with other software products to build Sage Master Builder extensions. This guide is available as a .pdf file only.

The Sage Master Builder SDK Developer Guide is available through the Developer Network Program. For information, browse to this link:

http://www.sagemasterbuilder.com/services/s_a_mbdn.asp

To view the product developed for Sage Master Builder using the API, browse to this link:

http://www.sagemasterbuilder.com/products/p_a_overview.asp

Sage Master Builder API Object Reference Guide

The *Sage Master Builder API Object Reference Guide* provides detailed information about the mbXML tags for each supported Sage Master Builder object and a reference section for the mbXML Schema. For information about the purpose and functionality of the Sage Master Builder API, please refer to the Sage Master Builder SDK Developer Guide.

The *Sage Master Builder SDK Developer Guide* is available through the Developer Network Program. For information, browse to this link:

http://www.sagemasterbuilder.com/services/s_a_mbdn.asp

Printing Sage Master Builder printable documentation

Links to the printable documentation are located under **Help > Printable Documentation** menu on the Sage Master Builder main window.

Important:

You must have the Adobe® Reader® installed on your computer to view and print Sage Master Builder guides. To download this free software for viewing and printing documents in PDF format, visit <http://www.adobe.com/products/acrobat/readstep2.html>

To print a Sage Master Builder printable document:

1. Click **Help > Printable Documentation**.
2. From the menu list, select the printable document you want to open.
Adobe Reader opens and loads the guide.
3. From the **File** menu, click **Print**.

Customer Support Resources

Contacting Customer Support

For more information about locating the product keys to activate your Sage Master Builder license, refer to the *Sage Master Builder Installation QuickStart Guide* or the *Sage Master Builder Installation and License Administration Guide*. If you need further assistance with installation, product keys, or license activation, call Customer Support at 800-866-8049.

If you have questions about Sage Master Builder, please refer to the in-product Help by pressing the F1 key in a specific window or by accessing Help through the drop-down list in the menu bar. If you require assistance and have a current support contract, contact Customer Support at 800-866-8049. There is also additional Customer Support contact information on our Web site:

http://sagemasterbuilder.com/customer_care/techsupport.asp

Frequently Asked Questions

With a customer support contract, you have access via the Internet to Frequently Asked Questions (FAQ) Knowledgebase. This resource contains a wealth of technical information, including top FAQs by

product version, common “How Do I” articles, as well as procedures for troubleshooting error messages or other problems. Best of all, it is updated continuously to bring you the hottest product alerts.

You must have a User Name and password to access FAQs. Contact information is available at our web site:

http://sagemasterbuilder.com/customer_care/techsupport.asp

About the Remote Assist Tool

The Remote Assist Tool allows Sage Customer Support representatives to access your systems and data remotely through your computer to provide support services to you and your company. You can quickly access the Remote Assist Tool from a Help menu link on the Sage Master Builder main page. Point to **Help > Customer Resources > Technical Support > Remote Assist Tool**.

Training Resources

Training options

Learning to use Sage Master Builder software has never been easier! Whether you choose to take online classes, work directly with your Sage Certified Consultant, or attend a seminar, you will learn how to get the most from Sage Master Builder. New and experienced users alike will discover new ways to save time and get more from every aspect of Sage Master Builder.

Overview of customer classes

Online classes make learning Sage Master Builder convenient and easy. Each instructor has years of experience using Sage Master Builder and will lead you step-by-step through the class material.

Online classes allow you to view the instructor’s computer screen as he or she demonstrates Sage Master Builder software. To participate in a class, simply dial in to a toll-free number and log on to a web site. Because the classes are live, you can ask questions and benefit from other students’ questions. Classes cover all aspects of Sage Master Builder, including project management, estimating, scheduling, and payroll. For more information, check our Frequently Asked Questions page: http://sagemasterbuilder.com/services/s_t_faq.asp

Getting started with training

All customers should begin with our New Customer Training series. These classes include an overview of the system features. They introduce you to Sage Master Builder and get you started. For more information, visit

http://sagemasterbuilder.com/customer_care/training.asp

Business Partners and Sage Certified Consultants

About Business Partners and Sage Certified Consultants

To serve you better, Sage Master Builder products and services are available to you through an authorized network of more than 100 business partners.

Your business partner has a team of certified consultants available to serve you. From simple how-to questions and hands-on demonstrations, to installation, implementation, and training, they're fully equipped to help you get where you want to be. For more information please contact your Sage Master Builder business partner.

Chapter 2

System Requirements and Configuration

This chapter provides information about the following:

- Hardware Requirements
- Operating System Requirements
- Network Configuration Requirements
- Microsoft® .NET Framework® 2.0 Requirements
- Report Scheduling and Faxing Functionality
- Report Scheduling and Faxing Functionality
- Sage Master Builder API

Hardware Requirements

About system requirements and configuration

It is very important to verify that your computers and server meet the system requirements for installing and running Sage Master Builder. We strongly recommend that you read through these system requirements before you begin installing any Sage Master Builder software.

About the Sage System Verification utility

The Sage System Verification utility is installed to the \MB7\Programs folder with each Sage Master Builder installation. This utility assists with trouble shooting the customers hardware related to the Sage licensing component.

Server hardware specifications

We cannot recommend server hardware specifications for your network as this depends on your specific requirements, such as the number of users on your network or other programs that might use server resources, such as firewalls, software applications, mail systems, and so forth. We can, however, recommend a set of minimum hardware requirements.

Caution!

We strongly recommend that an uninterruptible power system (UPS) be connected to the computer (workstation or server) in case of a power disruption in which you might lose data. The specifications for your UPS must be determined by your needs and level of risk.

Data backup

With any computer system, there is the possibility for failure and loss of data. For more information about backing up data, refer to the Sage Master Builder Help.

Caution!

Use a backup method and device suitable for your business requirements. We strongly recommend that you maintain a routine backup schedule and store your data in a safe environment that is separate from your server, preferably off site.

Server hardware requirements

Server Hardware	Minimum	Recommended
Processor	Intel® Pentium® 4 or comparable	Intel® Pentium® 4 or comparable
RAM	1 GB	4 GB+
Free Disk Space	3.5 GB	3.5 GB+
CD-ROM Drive	2X CD-ROM	2X CD-ROM+
Printers	For highest quality printing, we recommend laser or inkjet printers.	

Important:

These minimum recommendations include the 370 MB of hard disk drive space required for running Microsoft® .NET Framework® 2.0 software.

Related topics...

[Minimum requirements for the .NET Framework on servers](#)

[Minimum requirements for the .NET Framework on clients](#)

[Client and workstation hardware](#)

Client and workstation hardware requirements

Hardware	Minimum	Recommended
Processor (except Vista)	Pentium 3 or comparable	Pentium 4 or comparable
Vista workstation processor	1 GHz 32-bit	1 GHz+ 32-bit
RAM (except Vista)	512 MB	1 GB+
Vista workstation RAM	1 GB	2 GB
Free Disk Space	1 GB	3 GB+
CD-ROM Drive	2X CD-ROM	2X CD-ROM+
Printers	For highest quality printing, we recommend laser or inkjet printers.	

Note:

- These minimum recommendations include the 230 MB required for running Microsoft .NET Framework 2.0 software.
- The recommended free disk space is based on the installation of a single program and the average size of a Sage Master Builder company database. Allow at least 50 MB for each additional company database that you create.

Related topics...

[Minimum requirements for the .NET Framework on servers](#)

[Minimum requirements for the .NET Framework on clients](#)

[Server hardware requirements](#)

Operating System Requirements

Operating systems

We recommend that the following issues be taken into account for a smooth and successful installation experience:

Caution!

Sage Master Builder and/or its components **do not run on or are not supported** by some operating systems. Do not install Sage Master Builder to computers running these operating systems:

- Windows 95
- Windows 98
- Windows NT Server
- Windows NT Workstation
- Any 64-bit operating systems

Important:

- Microsoft .NET framework, version 2.0 must be installed on all computers running Sage Master Builder and the License Administration Tool.
- During installation, the .NET Framework 2.0 is installed on your computer automatically if it is not already installed.
- Be sure that all server and client computers meet both .NET requirements and Sage Master Builder requirements.

Server	Client/Workstation
Microsoft® Windows® Server 2003®	Microsoft Windows Vista® Business
Microsoft Windows Small Business Server 2003® (SP 1 or newer)	Microsoft Windows XP® Professional (SP 2 or newer)
Microsoft Windows 2000 Server® (SP 4 or newer)	Microsoft Windows 2000® Professional (SP 4 or newer)

Note:

When you have a network with three or more users, a dedicated file server increases performance and reliability.

Web browser requirements

Minimum	Recommended
Microsoft® Internet Explorer® 6.0, Service Pack 1	Microsoft® Internet Explorer® 6.0, Service Pack 1

Network Configuration Requirements

Server network configuration

Note:

- Sage Master Builder, Enterprise Edition runs in a wide area network (WAN) environment.
- For information about running Sage Master Builder in a WAN, contact your Business Partner or Sage Certified Consultant.

Process	Required
Network Protocol	TCP/IP
Minimum Network Speed - LAN	10/100/1000 Mbps
Minimum Network Speed - WAN	+/- 1.5 Mbps receiving data (downstream) +/- 384 Kbps sending data (upstream)

Client and workstation network configuration

Note:

For information about running Sage Master Builder in a wide area network (WAN), contact your Business Partner or Sage Certified Consultant.

Process	Required
Network Protocol	TCP/IP
Minimum Network Speed - LAN	10/100/1000 Mbps
Minimum Network Speed - WAN	128 Kbps Broadband

Microsoft .NET Framework 2.0 Requirements

About installation and Microsoft .NET Framework

When you install Sage Master Builder software, you will also install the Microsoft .NET Framework 2.0, if it is not already installed. It is important that you make sure that both your client and server computers meet the minimum requirements for installing both Sage Master Builder software and the .NET Framework 2.0.

Important:

If the Sage Master Builder installation requires an installation of Microsoft .NET Framework 2.0, the Sage Master Builder installation process may continue automatically after the .NET Framework installation is completed. If you are prompted to restart your computer after the .NET Framework installation, however, you must do it to continue the Sage Master Builder installation.

About installing .NET Framework 2.0 and Operating Systems

Caution!

The .NET Framework cannot be installed on the following operating systems:

- Microsoft Windows 95
- Microsoft Windows NT Server
- Microsoft NT Workstation
- Windows Server 2003, Enterprise Edition for Itanium-based Systems
- Windows Server 2003, Datacenter Edition for Itanium-based Systems

Note:

If Microsoft .NET Framework 2.0 is not already installed on your computers, then that installation alone may take up to 20 minutes per computer.

The following are the supported operating systems for .NET Framework 2.0:

- Microsoft Windows 2000 Professional with SP4
- Windows 2000 Server with SP4
- Windows 2000 Advanced Server with SP4
- Windows 2000 Datacenter Server with SP4
- Microsoft Windows XP Professional with SP1 or newer
- Windows XP Home Edition with SP1 or newer

- Microsoft Windows Server 2003 Standard Edition
- Windows Server 2003 Enterprise Edition

Viewing and verifying system information

You may use the `Winmsd.exe` to open the **System Information** window to view a list of your system information.

To view and verify system information:

1. Click **Start**, then click **Run**.
The **Run** dialog box opens.
2. In the **Open** text box, type `winmsd.exe`, and then press the **ENTER** key.
The **System Information** window opens displaying a list of your system information.

.NET Framework Requirements for Server Computers

Minimum requirements for the .NET Framework 2.0 on servers

Component	Required
Hard disk space at installation	800 MB
Hard disk space to run	370 MB
Video card	800x600, 256 colors

Related topics...

[Server hardware requirements](#)

[Client and workstation hardware](#)

[Minimum requirements for the .NET Framework on clients](#)

Verifying that Windows 2000 Service Pack 4 is installed

Important:

Before you install the .NET Framework 2.0 on a Windows 2000-based computer, you must have Windows 2000 Service Pack 4 installed.

To verify that Service Pack 4 is installed:

1. Right-click **Start**, and then click **Explore**.
2. Right-click **My Computer**, and then click **Properties**.

The **System Properties** dialog box appears and displays the service pack level of the system on the **General** tab.

Note:

To download service packs for Windows 2000, visit the following Microsoft Web site:

<http://www.microsoft.com/windows2000/downloads/servicepacks/default.asp>

.NET Framework Requirements for Client Computers

Minimum requirements for the .NET Framework 2.0 on clients

Component	Required
Hard disk space at installation	160 MB
Hard disk space to run	70 MB
Video card	800x600, 256 colors

Related topics...

[Server hardware requirements](#)

[Client and workstation hardware](#)

[Minimum requirements for the .NET Framework on servers](#)

Verifying that Microsoft Internet Explorer 6.0 Service Pack 1 is installed

You need to have Microsoft Internet Explorer 6.0 Service Pack 1 installed on a client to meet minimum requirements for running Sage Master Builder software. This is also a requirement for installing and running .NET Framework 2.0.

To verify that Microsoft Internet Explorer 6.0 Service Pack 1 is installed:

1. Launch Internet Explorer.
2. On the Internet Explorer **Help** menu, click **About**.
3. In the **About Internet Explorer** dialog box, verify that the version number is 6.0 Service Pack 1 or newer, and then click **OK**.

Note:

To download Service Pack 1 for of Microsoft Internet Explorer 6.0, visit the following Microsoft Web site:
<http://www.microsoft.com/windows/ie/ie6/downloads/critical/ie6sp1/default.mspx>

Verifying that Microsoft Windows Installer 3.1 is installed

Sage Master Builder and the License Administration Tool require .NET Framework 2.0 to run. The .NET Framework 2.0 requires the Windows Installer 3.1 to be installed. When you install Sage Master Builder software, you will also install the Windows Installer 3.1 automatically, if it isn't already installed. Many newer operating systems are integrated with Windows Installer 3.1 already.

To verify that Microsoft Windows Installer 3.1 is installed on earlier operating systems:

1. Click **Start**, and then click **Run**.
2. In the **Open** text box, type **msiexec /?**, and then press ENTER or click **OK**.
3. In the **Windows Installer** dialog box, verify that the version number is 3.1, and then click **OK**.

Verifying that Windows Management Instrumentation (WMI) is installed

When you plan to install .NET Framework applications that access system management information, you must install Windows Management Instrumentation (WMI). This component is installed as part of the core operating system on Windows XP and Windows 2000.

To verify that WMI is installed:

- Confirm that you have the %SystemRoot%\System32\WBEM\ folder.

Note:

- To download the latest version of the WMI, visit the following Microsoft Web site:
<http://msdn2.microsoft.com/en-us/library/aa394582.aspx>
- Before you install the .NET Framework 2.0 on a Windows 2000-based client computer, make sure that you have installed Windows 2000 Service Pack 4 or newer. To determine whether Service Pack 4 or newer is installed, see the topic, “Verifying that Windows 2000 Service Pack 4 is installed” in the subsection, .NET Requirements for Server Computers.

Report Scheduling and Faxing Functionality

About setting up emailing and faxing through Sage Master Builder

Important information regarding Report Scheduling and Faxing Functionality

Using the faxing functionality through the Sage Master Builder program requires a separate installation and setup procedure for a fax modem in your workstation and access to an analog phone line. You may also have to set up the cover page information and the number of times that the fax re-tries to send.

For more information about installing and setting up your fax modem, refer to the documentation that came with your fax modem. Sage Master Builder does not provide support for installing or setting up a fax modem.

Faxing Functionality and Operating Systems

Faxing functionality through Sage Master Builder only works with Windows 2000 Professional, Windows XP Professional, Windows Server 2003, and Vista Business operating systems. Faxing functionality requires that a version of Adobe Reader is installed on the computer doing the faxing.

Adobe Reader Version 8 not supported for faxing

Adobe Reader Version 8 does not support faxing from Windows. Therefore, you cannot fax from Sage Master Builder using Adobe Reader 8. Possible resolution is:

- Uninstall Reader Version 8, and install Reader Version 7. For instructions about downloading and installing Adobe Reader Version 7, search the Internet with your favorite search engine for Adobe Reader Version 7 downloads. Note: As of the pre-release date, if you select Vista as your operating system on the Adobe site, the default is to the download Reader Version 8.1; however, if you select the XP operating system, you have the option to download Reader Version 7.

Adobe Reader Version 7 remains visible in system tray

When faxing from Sage Master Builder using the Vista operating system, the Reader icon remains visible in your system tray instead of closing. The Reader window can be closed manually, and nothing prevents the fax from being sent.

Adobe Reader Version 7 displays error message on Window 2000

When faxing from Sage Master Builder using the Windows 2000 operating system, Adobe Reader Version 7 stays visible on task bar, and it displays an error message. The Reader window can be closed manually, and the message does not prevent the fax from being sent.

If you prefer not to see this message, uninstall Adobe Reader Version 7, and install Adobe Reader Version 6. For instructions about downloading and installing Adobe Reader Version 6, search the Internet with your favorite search engine for Adobe Reader Version 6 downloads.

Faxing and Adobe Reader version recommendations

Faxing through Sage Master Builder uses the Adobe Reader program. Some versions of Adobe Reader work better with specific operating systems. We recommend the following guidelines:

- When running Microsoft Windows 2000, use Acrobat 6.
- When running Microsoft Windows XP, use Acrobat 6 or 7.
- When running Microsoft Vista, use Acrobat 7

Adobe Reader and Automatic Updates

On the workstation(s) sending faxes, you must have Adobe Reader (version 5 or higher) installed. It is likely that you already have this free program installed if you have used the PDF copies of our manuals or some of our training class materials. If not, you can go to Adobe's web site to download it:

<http://www.adobe.com/products/acrobat/readstep2.html>

Disengage automatic updating for Adobe Reader

If you are using the scheduling capability for sending faxes, we recommend that you disengage the automatic “check for updates” capability of Acrobat Reader as it will prevent scheduled reports from completing.

Note:

Instructions disengaging automatic “check for updates” differ from version to version of Adobe Reader. Refer to the Adobe Reader Help for instructions.

Report Scheduling and Email Functionality

Important:

Using the email capability of Sage Master Builder requires access to a simple mail transfer protocol (SMTP) email server. This server may be located on your workstation PC, on a server on your company's network, or at your Internet service provider (ISP). If the email server is local, you may need the assistance of an IT professional to properly identify or set up this capability. If the email server is located at your ISP, you may need contact your ISP for assistance.

Using the ISP's simple mail transfer protocol (SMTP) server to send email via Sage Master Builder typically requires "user authentication" at the SMTP server. An example of an SMTP email server name is "smtp.att.sbcglobal.net."

Different ISPs may use different terms when referring to user authentication. In general, however, user authentication means verifying a user's identity by means of a "user name" and "password."

In the context of sending email through Sage Master Builder using an ISP's SMTP server, user authentication only refers to verifying the user's identity at the ISP's SMTP server. It does not refer to your:

- Sage Master Builder user name and password
- Network domain user name and password
- Windows system user name and password.

Note:

- Sage Software does not provide support for setting up or installing an email server.
- You set up user authentication and your fax line access dial out number on **7-2 Company Information**. Click this Help topic "Entering company information."

Sage Master Builder API

System requirements for Sage Master Builder API

If you are using the Sage Master Builder API, the minimum and recommended system requirements may vary. These requirements must be considered in addition to the recommended system requirements for running Sage Master Builder or the Sage Master Builder Enterprise Edition.

It may be necessary to increase the processor speed, memory and/or disk space of your system depending upon the requirements of the third-party application using the API. Please consult with your third-party vendor to determine what changes, if any, should be made to your hardware configuration in order to meet your desired performance criteria.

Chapter 3

Sage Master Builder Installation

This chapter provides information about the following:

- Installation Preview
- Program Installation to Different Configurations
- New Installations
- Upgrade Installations

Installation Preview

Business implementation considerations and installation

Installing Sage Master Builder software should be very easy to complete; however, implementing and running your business in Sage Master Builder must be thoroughly planned out in advance to harness the tremendous power of this software.

We recommend that you take full advantage of all the knowledge and advice found in Sage Master Builder documentation and training classes. We also recommend that you work with Sage Certified Consultants, Business Partners, and accounting professionals before you begin to implement this software for your business.

Important:

If this is a first-time installation of Sage Master Builder, working in the program with your company data must be preceded by a data migration and business implementation plan. For more information about implementing Sage Master Builder for your company, see the information in Chapter 1 of this guide about Business Partners and Sage Certified Consultants.

Related topics...

[Pre-installation information](#)

[Recommended installation locations](#)

[Installing to different network environments](#)

Pre-installation information

Caution!

For current Sage Master Builders customers: When you reinstall or upgrade, turn off scheduled reports. Reports must not be printed, faxed, or emailed at the same time as your reinstall or upgrade.

Caution!

For current Sage Master Builder customers: Do **not** upgrade or reinstall Sage Master Builder while the Sage Master Builder API is running.

Important:

- Existing Sage Master Builder customers: Before you install, make a backup copy of your existing company data.
- Before installing Sage Master Builder software, shut down all other programs except firewall or antivirus software.
- You must have administrator rights on the network and administrator rights on each computer to install Sage Master Builder software. Administrators have full control over computers for installing software.
- We strongly recommend that you install the Sage license server on a computer that is always available to other computers on your network that are running Sage Master Builder.
- For installation on Citrix and Terminal Servers, see [Appendix A, Special Configuration under the section, Citrix and Terminal Servers.](#)

Duration of the installation process

Plan on at least 5 and possibly up to 20 minutes per computer to install Sage Master Builder and its companion software, such as the Sample Company and the License Administration Tool. The duration of the Sage Master Builder installation depends a great deal upon each computer's configuration. For example, some newer computers are pre-installed with essential software required to run Sage Master Builder software such as the .NET Framework and the Windows Installer 3.1. Installation to some older computer may take more time.

Other required software

Both Windows Installer 3.1 and the Microsoft .NET Framework 2.0 must be installed on all computers running Sage Master Builder software.

First, the installer determines if the .NET Framework 2.0 and the Windows Installer 3.1 are already installed. If not, the installer installs the required software automatically.

Important:

If you need to install Windows Installer 3.1, then the computer must restart before you continue with the Sage Master Builder installation. After your computer restarts, opening and closing your CD drawer with the installation CD in it should restart the Sage Master Builder installation. If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select SageMasterBuilder.exe. Then click **OK**.

Plan for an additional 10 to 15 minutes per computer to install .NET Framework 2.0 and Windows Installer 3.1 on each computer.

Product CD

You need the product CD to install the Sage Master Builder software.

Installation and Internet connectivity

Internet access is not required when you install Sage Master Builder.

Installation environments, operating systems, and services

It is very important that you understand the network environments and operating systems on the computers and server computers where you install Sage Master Builder software. [Appendix A, Special Configuration](#) provides detailed information about installing to different environments.

Installation options

When you load the Sage Master Builder CD into your CD drive, the **Welcome to Sage Master Builder Installation** window opens. You are presented with two options.

- **This computer will be my Sage license server.** Choose this option to install the Sage license server on the computer that is your network server. You only need to install this option one time on your network. This is the computer on which you activate your license.

- **This computer will run Sage Master Builder only.** You may install Sage Master Builder on as many computers as you like. Following each Sage Master Builder installation, you must specify the computer on your network that is the Sage license server.

Related topics...

[Installing the Sample Company](#)

[About Sage Master Builder API](#)

[Installing Sage Master Builder programs on Citrix and Terminal Servers](#)

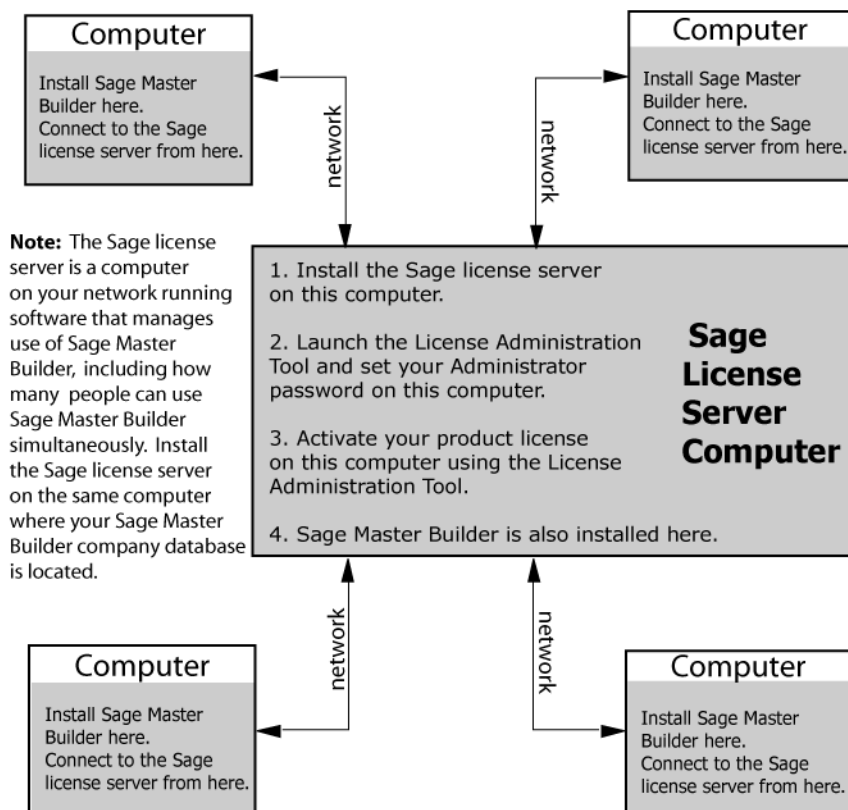
[Glossary definitions](#)

Recommended installation locations

We recommend that you install the Sage license server program and activate your license where your Sage Master Builder company database is or will be located. You should have addressed security and stability issues on this computer already. Locating the Sage license server on the same computer with the company data decreases troubleshooting time in the event of a network connectivity problem or hardware failure.

We recommend that an uninterruptible power system (UPS) be connected to your network server computer in case of a power disruption. This helps prevent data loss and also decreases troubleshooting time in the event of a network connectivity problem or hardware failure. The specifications for your UPS must be determined by your needs and level of risk.

Recommended Program Installation Locations for Sage Master Builder and the Sage License Server in a network environment



To run Sage Master Builder connected to your company data, computers must be connected to the Sage license server. If a person has a connectivity problem or license use problem and sees the an unable to connect message when all other people are connected, then you know that the connectivity problem is limited to that one person. If you encounter a hardware failure with your server, then all the people running Sage Master Builder will be disconnected.

The License Administration Tool program is installed on all computers by design. The License Administration Tool's **Administrator** can log on to the tool from any computer on the network to manage license issues.

This provides more access possibilities for the Administrator to manage license and reservation functions.

Other Installations Options and Considerations

About installation and third-party firewalls

There are many third-party firewalls on the market, such as those manufactured by Norton, MacAfee, and Zone Labs. You may have one of these firewalls installed on your network computers. If that is the case, the firewall is going to display an alert message when you install any new program that acts as a server or accesses the Internet. When installing Sage Master Builder, Sage license server, the Sage Master Builder API, Microsoft .NET Framework 2.0, and/or any other new application on your computer, you will see firewall alerts.

When you see the alert messages asking if you should allow any of these services and programs related to Sage Software products and Sage Master Builder to access the Internet, choose to allow them to access the Internet and/or run as a service.

Related topics...

[Installing the Sage License Server](#)

Installing the Sample Company

The **Sample Company** is pre-selected to install with Sage Master Builder software. It provides an example of running a company in Sage Master Builder. There are sample accounts, sample employees, sample takeoffs, and much more. By viewing and working with this sample data, you can gain an understanding of how Sage Master Builder helps you manage your construction business.

In addition, Sage Master Builder trainers use the **Sample Company** extensively during Sage Master Builder training classes. We highly recommend that you install the Sample Company during initial installation and that you re-installing when upgrading.

Important:

Installing the Sample Company overwrites any previous installations of the Sample Company.

Installing the Sage Master Builder API

The Sage Master Builder API is installed by default on all computers. It allows software developers to create applications with features more precisely targeted for highly specific market segments while at the same time leveraging the substantial functionality already provided by Sage Master Builder.

For example, a project estimating application could be developed to integrate with Sage Master Builder to take advantage of Sage Master Builder's powerful accounting and project management features. For more information about the Sage Master Builder API, see [Appendix B: Sage Master Builder API](#).

Program Installation to Different Configurations

About installing the Sage Master Builder software to different configurations

You can install Sage Master Builder software to many different configurations, for example, stand-alone, network server, Citrix and Terminal Services servers, peer-to-peer servers, and workstations.

Important:

- The optimal operational size of a peer-to-peer network running Sage Master Builder is two to five workstations. Additional workstations may adversely impact Sage Master Builder response times. Networks consisting of more than five (5) workstations may need to use one computer as a dedicated server.
- For installation to Citrix and Terminal Servers, see [Appendix A. Special Configuration under the section, Citrix and Terminal Servers.](#)

Sage Master Builder allows users to share data and reports stored on a network hard drive. From different workstations, users can then access the server to share one set of data, one set of reports, and one set of report forms.

The installation program checks for the components necessary to run Sage Master Builder and then copies the program modules and reports to the \MB7 folder and subfolders that are created on the hard disk. In addition, the installation copies system files necessary for program operations to the Windows and Windows System folders.

The installation process does not make any configuration changes to the computer. After installation is complete, you must configure the stand-alone computer, server computer, or workstation for optimal performance. For example, you need to configure the date format on computers running the Windows Server 2003 operating system. For detailed information about configuring each server and workstation depending on its operating system, see [Appendix A, Special Configuration](#).

Note:

When you receive program updates, repeat the installation to each workstation or server where the Sage Master Builder program is installed.

Related topics...

[About installation and third-party firewalls](#)

[Installing on computers running Citrix and Terminal Servers using DOS commands](#)

New Installations

Installing the Sage license server

Important:

- This step-by-step procedure is for new installations only: (1) Sage Master Builder has never been installed on the computer, or (2) The Sage Master Builder program, Sage Master Builder licensing, and Sage Master Builder API have all been uninstalled using Add and Remove Programs.
- This suggested flow of installation procedures is for Sage Master Builder only and **not** for Sage Master Builder Enterprise Edition. For Sage Master Builder Enterprise Installation and configuration procedures, see “Appendix C” in this book.

When you begin the installation process from the CD-ROM, you are presented with two installation options:

- **This computer will be my Sage license server.**
- **This computer will run Sage Master Builder only.**

To install to the Sage license server:

Note:

Also select this option if you are running in a stand-alone environment. Stand-alone means that you are running Sage Master Builder on one computer, or you are not networking with other computers running Sage Master Builder.

1. Insert the Sage Master Builder CD into your CD-ROM drive.

If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select **SageMasterBuilder.exe**. Then click **OK**.

2. On the installation window, read the instructions on the installation welcome window, and click **Next**.

3. On the installation option window, select the option **This computer will be my Sage license server**, and click **Next**.
4. On license agreement window, read the **License Agreement** carefully.
5. Select the check box to accept the terms, then click **Next** to continue the installation.

The select a drive window appears. The check box for installing the **Sample Company** is pre-selected. We recommend installing the **Sample Company** on all computers.

Important:

Sage Master Builder should always be installed to a local drive. You can share Master Builder data that is located on a network drive among client workstations running Sage Master Builder locally.

6. Select a local drive location for the installation, and click **Next**.

The installer begins the installation process. It checks to see if the computer has .NET Framework 2.0 and Windows Installer 3.1 installed. If these programs are not found, the installer installs them.

Note:

If you need to install Windows Installer 3.1, then the computer must restart before you continue with the Sage Master Builder installation. After your computer restarts, opening and closing your CD drawer with the installation CD in it should restart the Sage Master Builder installation. If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select SageMasterBuilder.exe. Then click **OK**.

The Sage Master Builder API is installed next. For more information about the Sage Master Builder API, see [Appendix B: Sage Master Builder API](#).

At the end of the installation process, a confirmation window appears containing a list of installed programs. Here is an example.

- **Sage license server software**
- **License Administration Tool**
- **Sage Master Builder**
- **Sample Company**

This window also displays the computer's IP Address and its network name. You will use this information to specify the Sage license server.

7. Review the list of installed programs, and write down the IP Address and network name of the computer.

Important:

Keep the Sage license server computer's IP Address and name in a convenient location. To select the Sage license server from client computers running Sage Master Builder, you need to select its name from a list or type the computer's IP Address or name in a text box.

8. Click **Next**.

The activate your product license window appears. The **Launch the License Administration Tool** check box is pre-selected to launch the License Administration Tool so you can activate your license.

9. Read the instructions about activating your product license, and then click **Finish**.
10. The **Logon Administrator Password** window opens.
11. Set the **Administrator** password.

For information about this process, click the **Help** button on the **Logon Administrator Password** window.

For details about managing your license, see [Chapter 4, Managing Your License with the License Administration Tool](#).

Installing Sage Master Builder

Important:

- This step-by-step procedure is for new installations only: (1) Sage Master Builder has never been installed on the computer, or (2) The Sage Master Builder program, Sage Master Builder licensing, and Sage Master Builder API have all been uninstalled using Add and Remove Programs.
- This suggested flow of installation procedures is for Sage Master Builder only and **not** for Sage Master Builder Enterprise Edition. For Sage Master Builder Enterprise Installation and configuration procedures, see “Appendix C” in this book.

When you begin the installation process from the CD-ROM, you are presented with two installation options:

- **This computer will be my Sage license server.**
- **This computer will run Sage Master Builder only.**

To install Sage Master Builder only:

1. Insert the Sage Master Builder CD into your CD-ROM drive.
If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select **SageMasterBuilder.exe**. Then click **OK**.
2. On the installation welcome window, read the instructions on the installation welcome window, and click **Next**.
3. On the installation option window, select the option **This computer will run Sage Master Builder only**, and click **Next**.
4. On the license agreement window, read the **License Agreement** carefully.
5. Select the check box to accept the terms, then click **Next** to continue the installation.

The select a drive window appears. The check box for installing the **Sample Company** is pre-selected. We recommend installing the **Sample Company** on all computers for training purposes.

6. Select a local drive location for the installation, and click **Next**.

The installer begins the installation process. It checks to see if the computer has .NET Framework 2.0 and Windows Installer 3.1 installed. If these programs are not found, the installer installs them.

Note:

If you need to install Windows Installer 3.1, then the computer must restart before you continue with the Sage Master Builder installation. After your computer restarts, opening and closing your CD drawer with the installation CD in it should restart the Sage Master Builder installation. If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select SageMasterBuilder.exe. Then click **OK**.

The Sage Master Builder API is installed next. For more information about the Sage Master Builder API, see [Appendix B: Sage Master Builder API](#).

An installation complete window appears. The **Launch Sage Master Builder** check box is pre-selected so that you can launch Sage Master Builder and specify the Sage license server.

7. Read the important message and follow the instructions to launch Sage Master Builder.
8. Click **Finish**.

Master Builder begins its launch process by displaying the **Specify Sage License Server** window.

For more information about this process, you can click the **Help** button on the **Specify Sage License Server**, or see [Chapter 5, License Use and Sage Master Builder](#).

Related topics...

[About upgrading Sage Master Builder](#)

Upgrade Installations

About upgrading Sage Master Builder

If you are an existing Sage Master Builder customer, installing the next version on computers that already have Sage Master Builder installed “upgrades” the software. This version of Sage Master Builder upgrades the software from version 12 to version 13. This upgrade will also update your Sage licensing software automatically.

When you upgrade Sage Master Builder, the program recognizes what configuration has been previously installed on each computer. For example, when you upgrade the license server computer, the program recognizes that this computer is your license server and upgrades it accordingly. Similarly, when you upgrade a workstation computer, the program upgrades that computer as a workstation.

Important:

If the Sage licensing software version does not match between the workstation computer and the license server computer, then Sage Master Builder will not run on the client. To prevent this from happening, make sure that the license server computer and all client workstation computers are running the same version of the Sage licensing software. When upgrading, you should install the upgrade to the license server computer first.

Upgrade pre-installation tasks

Upgrading your Sage Master Builder software requires that you complete preliminary tasks to ensure the safety of your company data in Sage Master Builder. Additional tasks may be completed using Microsoft Windows functions or third-party program functions. Information on completing these tasks is located in the Sage Master Builder program Help.

When upgrading from version 12 to version 13, it is important that you choose a block of time when you can install the upgrade to all the computers in your office beginning with your Sage license server computer. Depending on your computer’s hardware and your network

configuration, plan on 15 to 30 minutes per computer for the installation process alone. Additional tasks may take extra time.

1. **Make two backups of your company data** - For instructions, launch the Sage Master Builder Help viewer and search using the Help search shortcut “databackup” to find the data backup topics.
2. **Make sure that no reports are scheduled to run during installation** - Plan your upgrade installation during the time when no reports are scheduled to be printed, faxed or emailed. For instructions, launch the Sage Master Builder Help viewer and search using the Help search shortcut “schedulingreports.” More topics about scheduling reports are located at the end of the topic “About report scheduling.”
3. **Exit Sage Master Builder and all other programs** - You cannot install the Sage Master Builder upgrade when the program is running. We recommend that you shut down all programs when installing Sage Master Builder.
4. **Locate the Sage license server on your network**, and begin the upgrade installation there.

Note:

You do not have to shut down your antivirus or firewall programs to install Sage Master Builder.

Related topics...

[About upgrading Sage Master Builder](#)

Installing the upgrade to either the Sage license server or client workstation

Use the same upgrade installation process for both your Sage license server computer and your workstation computers.

Important:

Begin installing the upgrade first on the existing Sage license server computer, and then install it to the workstations once the license server installation is complete.

To install the upgrade:

1. Insert the Sage Master Builder CD into your CD-ROM drive.
If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select **SageMasterBuilder.exe**. Then click **OK**.
2. On the Welcome window, notice that a previous installation has been found, and click **Next**.
3. On license agreement window, read the **License Agreement** carefully.
4. Select the check box to accept the terms, then click **Next**.
5. On the Select a drive window, select the local drive where Sage Master Builder is currently installed.

The check box for installing the **Sample Company** is pre-selected. We recommend that you install the **Sample Company** on all computers for training purposes.

Important:

The upgrade installation over-writes the existing Sample Company. If you want to save changes to the existing Sample Company, clear the check box. If you do not over-write the Sample Company, you must reindex the Sample Company database using **7-4 Rebuild Indexes** after the upgrade installation.

6. To begin the installation, click **Next**.

The installation process installs Sage Master Builder, Sage licensing software, and the API program. When the installation is finished, the **Launch Sage Master Builder** check box is pre-selected so that you can launch Sage Master Builder.

7. On the Installation complete window, click **Finish** to launch Sage Master Builder.
8. Follow the instructions for Post installation tasks to re-index your company database from one computer and re-schedule your reports, as necessary.

Related topics...

[About upgrading Sage Master Builder](#)

Upgrade post-installation tasks

Once you have completed your upgrade installation, complete the following tasks before you open your company and begin work in Version 13 of Sage Master Builder.

1. **Launch your company and re-index the database** - Before you can work in Sage Master Builder company data, you have to re-index the databases of each company that you do work in. This process brings the company databases into conformation with new version of the program.

For instructions, launch the Sage Master Builder Help viewer and search using the Help search shortcut “indexdatabase.”

Important:

You only have to re-index each company's database one time from one computer using **7-4 Rebuild Indexes**.

2. **Re-schedule your reports** - If you had to delete scheduled reports that would have interfered with the upgrade installation, return to the report scheduling window and re-schedule your reports.

For instructions, launch the Sage Master Builder Help viewer and search using the Help search shortcut “schedulingreports.” More topics about scheduling reports are located at the end of the topic “About report scheduling.”

Related topics...

[About upgrading Sage Master Builder](#)

About re-installing and changing the computer designation

Re-installing Sage Master Builder on a computer that is the Sage license server does not re-install the License Administration Tool or change the Manage License settings for your product.

If you choose to re-install Sage Master Builder over an existing installation, the installation process re-installs the software using the options that were selected in the initial installation. Therefore, after re-installation, a Sage license server computer remains a Sage license server and a client workstation remains a client workstation.

To change an installation option by re-installing (i.e., changing a client workstation into the Sage license server or the Sage license server into a client workstation), you have to:

1. Uninstall Sage Master Builder Licensing from the **Control Panel > Add or Remove Programs** window.
2. Re-install Sage Master Builder following the instructions for initial installation.

Chapter 4

Managing Your License with the License Administration Tool

This chapter provides information about the following:

- License Administration Tool
- Administrator User and Administration Password
- Monitoring Product and Feature Use
- Managing Licenses
- Managing Reservations
- Troubleshooting Network Disconnection Issues

License Administration Tool

About the License Administration Tool for Sage Master Builder

When you purchase Sage Master Builder software, it includes the License Administration Tool. Using the License Administration Tool, you can import license files, activate licenses, reserve the use of products and features, and monitor the use of products and features. This tool also supports site licenses and floating use licenses. During software installation, the License Administration Tool is automatically installed on the computer that the software installer designates as the Sage license server.

What is the Sage license server, and why do I need it?

When you purchase Sage Master Builder software, it includes the License Administration Tool. Using the License Administration Tool, you can import license files, activate licenses, reserve the use of products and features, and monitor the use of products and features. This tool also supports site licenses and floating use licenses. During software installation, the License Administration Tool is automatically installed on the computer that the software installer designates as the Sage license server.

Important:

Before you can use Sage Master Builder with your activated license, you have to specify the computer on your network that is the Sage license server when you launch Sage Master Builder.

Where is the Sage license server located?

The Sage license server is software running on a computer on your network that manages the Sage Master Builder products and features that you purchased. Products and features can be a “core product,” additional “modules,” and a number of “license uses.” The computers running your Sage Master Builder have to be connected to the computer running the Sage license server so that the correct products, features, and number of license uses are available to you.

Related topics...

[About the administrator user and administrator password](#)

[Setting the Administrator password](#)

Administrator User and Administration Password

About the administrator user and administrator password

To activate and manage your Sage Master Builder product license, you must log on to the License Administration Tool as **Administrator**. You do that by selecting to log on as the **Administrator** and set the administrator user password. At any launch of the License Administration Tool, you have the option to log on as **Other (View Only)**, which requires no password.

Important:

- We strongly recommend that you write down your License Administration Tool **Administrator** password and save it in a convenient place. If you forget your password, you have to call Sage Customer Support to re-set it.
- Before the Administrator can log on and manage the license using the License Administration Tool from a client workstation computer, the \MB7 folder must be shared on the Sage license server computer. For information about sharing folders, see the Windows Help.

Only the administrator user has rights to access the License Administration Tool to perform such tasks as:

- Adding and updating the product license
- Changing the **Administrator** password
- Setting up license groups and license use reservations

After an administrator password has been set, subsequent launches of the License Administration Tool display two links:

- **I forgot my password**
- **Change password**

Clicking either of these links launches other windows to either change your password or re-set the password.

Related topics...

[Setting the administrator password](#)

[Changing the administrator password](#)

[Re-setting a forgotten administrator password](#)

Setting the Administrator password

During installation with the **Launch the License Administration Tool** check box selected, the License Administration Tool displays the **Logon Administrator Password** window automatically. Otherwise, you can launch the **Logon Administration Password** window by double-clicking the License Administration Tool desktop icon.

To set the Administrator password:

1. In the **Password** text box, type a password.

Note:

Your License Administration Tool password is case-sensitive.

2. In the **Confirm Password** text box, re-type the password and click **OK**.

The **License Administration Tool** window opens. From this window you can manage your product license, license groups, and license use reservations.

Related topics...

[About the administrator user and administrator password](#)

[Changing the administrator password](#)

[Re-setting a forgotten administrator user password](#)

Changing the Administrator password

After initially setting your administrator user password, every subsequent launch of the **License Administration Tool** displays the **Logon Administrator Password** window.

The window displays two links, **I forgot my password** and **Change password**. Instead of typing your password and launching the **License Administration Tool** window, you can click the Change password link to display the **Change Password** window.

To change the Administrator password:

1. On the **Logon Administration Password** window, click the **Change password** link.

The **Change Password** window opens.

2. In the **Old Password** text box, type the old password.
3. In the **New Password** text box, type a new password.

Note:

Your License Administration Tool password is case-sensitive.

4. In the **Confirm Password** text box, re-type the new password and click **OK**.

The **License Administration Tool** window opens. From this window you can manage your product license, license groups, and license use reservations.

Related topics...

[About the administrator user and administrator password](#)

[Setting the administrator password](#)

[Re-setting a forgotten administrator password](#)

Re-setting a forgotten administrator password

To re-set your Administrator password, you have to contact Sage Customer Support.

To re-set a forgotten Administrator password:

1. On the **Logon Administrator Password** window, click **I forgot my password**.

The **Forgotten Password** window opens.

2. Read the instructions, phone Sage Customer Support at 800-866-8049, and type the temporary password they provide you in the text box.

You can also ask them to send you the temporary password in an email message. From that message, you can copy and paste the temporary password into the **Forgotten Password** text box.

Important:

Type the temporary password exactly as the Sage Customer Support names each letter as either upper-case or lower-case.

3. Click **OK**.

The **Change Password** window opens.

4. In the **New Password** text box, type a password.
5. In the **Confirm Password** text box, re-type the password and click **OK**.

The **License Administration Tool** window opens. From this window you can manage your product license, license groups, and license use reservations.

Related topics...

[About the administrator user and administrator password](#)

[Setting the administrator password](#)

[Changing the administrator user password](#)

Monitoring Product and Feature Use

About monitoring product and feature use

After activating licenses and reserving the use of Sage Master Builder, you can monitor the license use and group reservations from the **License Administration Tool** window.

Tip:

The terms you see in this topic, such as Status, License Type, and so forth are defined in the Glossary under **License Administration Tool**.

When you select a **Floating use License Type** with reservations in the **License Administration Tool** window, the window displays the following grids:

- License details for product line
- Summary of product or feature use
- Current users of the product or feature

When you select a **Floating use License Type** without reservations, the window displays the license details **Current users of the product or feature** grid.

When you select a **Site License Type**, the window displays the license details grid and definitions for the **Product Line**, **Product or Feature**, and **License Type**.

Note:

If you have not added licenses, the grids on the **License Administration Tool** window are empty.

License details for product line

After you add licenses, the license details grid displays the following information for the product line:

- **Status**

- **Product Line** (Hidden by default. To display, right-click a column heading in the grid and select **Hide/Show Columns > Product Line.**)
- **Product or Feature**
- **Reservations Allowed** (Hidden by default. To display, right-click a column heading in the grid and select **Hide/Show Columns > Reservations Allowed.**)
- **License Type**
- **Total Uses**
- **Available Uses**
- **In Use**
- **Expiration Date**
- **Version**

Summary of product or feature use

After you reserve the use of products and features for a floating use license, the **Summary of product or feature use** grid displays the following information for the license that you select in the license details grid.

- **Reserved For**
- **Total**
- **Available**
- **In Use**

Current users of the product or feature

After you activate floating use licenses, the Current users of the product or feature grid displays the following information for the license that you select in the license details grid.

- **User Name**
- **Reserved Under**
- **Computer Name**

- **Session ID**
- **In Use Since**

Show and Hide Column Features

About showing or hiding columns

Use the **Show/Hide Columns** window to select the columns that you want to display in license details grid on the **License Administration Tool** window.

Related topics...

[Showing columns](#)

[Hiding columns](#)

[Hiding all columns](#)

Showing columns

To monitor license use, you may choose to show columns.

To show columns:

1. From the **License Administration Tool** window, right-click a column heading in the license details grid and select **Hide/Show Columns**.
2. From the **Show/Hide Columns** window, select the columns that you want to display or click **Show All**.
3. Click **OK**.

Related topics...

[About showing or hiding columns](#)

[Hiding columns](#)

[Hiding all columns](#)

Hiding columns

You may want to hide one or several columns for business security reasons.

To hide a column:

1. From the **License Administration Tool** window in the license details grid, right-click the column heading that you want to hide.
2. Select **Hide Column**.

Related topics...

[About monitoring product and feature use](#)

[About showing or hiding columns](#)

[Hiding all columns](#)

Hiding all columns

You may want to hide all the columns for business security reasons.

Note:

You cannot hide the **Product** or **Feature** column.

To hide all columns

1. From the **License Administration Tool** window, right-click a column heading in the license details grid and select **Hide/Show Columns**.
2. From the **Show/Hide Columns** window, click **Hide All**.
3. Click **OK**.

Related topics...

[About monitoring product and feature use](#)

[About showing or hiding columns](#)

[Hiding columns](#)

Managing Licenses

About managing licenses

Use the **Manage Licenses** window to add product keys, update product keys, and activate licenses.

Related topics...

[Importing the license file](#)

[Adding or updating product keys](#)

[Activating licenses](#)

Importing the license file

License activation is based on either importing a license file or manual entry of up to four product keys. Take a moment to locate your product keys. They are a series of 16-letter codes used to activate your license. They have been sent to you in a license file attached to an email from your Business Partner, on your Sage Master Builder packing slip, and/or on a sticker on the CD envelope.

Use the **Import License File** window to import a license file into the Sage license server.

Note:

If you did not receive a license file in an email message, follow the instructions for [adding or updating product keys](#).

To import the license file:

1. Open the e-mail message with the attached license file from Sage Software or your business partner.
2. Save the license file attachment to the Windows desktop.
3. From the **License Administration Tool** window, click **Manage Licenses**.
4. From the **Manage Licenses** window, click **import the license file**.
5. From the **Import License File** window, select the license (.lic) file name and click **Open**.

6. From the **Manage Licenses** window, click **activate the licenses**.
7. Click **Close**.

Related topics...

[About managing licenses](#)

[Adding or updating product keys](#)

[Activating licenses](#)

Adding or updating product keys

License activation is based on either importing a license file or manual entry of up to four product keys. Take a moment to locate your product keys. They are a series of 16-letter codes used to activate your license. They have been sent to you in a license file attached to an email from your Business Partner, on your Sage Master Builder packing slip, and/or on a sticker on the CD envelope.

Use the **Add or Update Product Keys** window to type the product keys. Each time you add or make changes to licenses, you will receive new product keys.

Note:

If you received an e-mail message with an attached license file from Sage Software, follow the instructions for importing the license file.

To add or update product keys:

1. From the **License Administration Tool** window, click **Manage Licenses**.
2. From the **Manage Licenses** window, click **type the product keys**.
3. In the **Type the product keys** boxes on the **Add or Update Product Keys** window, type the product keys listed on your CD envelope or that are printed on your packing slip.
4. On the **Add or Update Product Keys** window, click **Accept Product Keys**.
5. Click **Accept Product Keys**.

6. On the **Manage Licenses** window, click **activate the licenses**.
7. Click **Close**.

Related topics...

[About managing licenses](#)

[Importing the license file](#)

[Activating licenses](#)

Activating licenses

After importing the license file or entering product keys, you have to activate your licenses.

To activate your license:

1. On the **Manage Licenses** window, either import the license file or add the product keys.
2. Click **activate the licenses**.
3. Click **Close**.

When you see two green check marks by **Step 1** and **Step 2**, you know that your license has been activated. You can now launch the License Administration Tool and specify the computer on your network that is the Sage license server.

Related topics...

[About managing licenses](#)

[Importing the license file](#)

[Adding or updating product keys](#)

Managing Reservations

About managing group reservations

Use the **Group** and **Uses** columns on the **Manage Reservations** window to reserve product and feature uses for groups.

When a user logs in to a Sage Master Builder company, the Sage license server assigns a license use from the first available group to which the user belongs. If no reserved license uses are available, the Sage license server assigns a license use from the unreserved license uses.

Important:

If no reserved or unreserved license uses are available, you cannot launch Sage Master Builder connected. You can only launch the program disconnected with exclusive access.

Setting up group reservations

Use the **Group** and **User** columns on the **Manage Reservations** window to reserve license uses for groups.

When a user logs in to a Sage Master Builder company, the Sage license server assigns a license use from the first available group to which the user belongs. If no group reservations are available, the Sage license server assigns a license use from the unreserved uses.

Important:

You must import the license file or enter product keys before you set up group reservations.

To set up group reservations:

1. From the **License Administration Tool** window, click **Manage Reservations**.

The **Manage Reservations** window for this product line opens.

2. In the **Group** column, type the name of the first group of users.

You can assign any group name that works for your purposes.

3. In the **Uses** column, type the number of license uses that you want to reserve for this group.

Important:

The total number of **Uses** for all groups cannot exceed the **Total Uses** listed for this product on the **License Administration Tool** window.

4. Repeat steps 2 and 3 for each group.

Tip:

If you want to retain some unreserved license uses, do not reserve all license uses for groups.

5. Click **OK**.

Related topics...

[About managing licenses](#)

[Activating licenses](#)

[Removing group reservations](#)

Removing group reservations

You may need to create new reservation groups when you hire new employees or open a new office.

To remove group reservations:

1. From the **License Administration Tool** window, click **Manage Reservations**.
2. From the **Management Reservations** window, select the row for the **Group** that you want to remove.
3. Click the **Delete the selected row** (the X button).
4. Click **OK**.

Related topics...

[About managing licenses](#)

[Importing the license file](#)

[Activating licenses](#)

[About managing group reservations](#)

[Setting up group reservations](#)

Troubleshooting Network Disconnection Issues

Disconnected from the network

Note:

This information does not apply if you are running Sage Master Builder and the Sage license server on one computer as a stand-alone installation.

If a workstation is disconnected from the Sage license server while you are using the License Administration Tool, the system displays a **Disconnected from the License Server** message.

Since Sage Software products run on your company's network, it is important to maintain the network connection between workstations and the Sage license server. When your workstation is disconnected from the Sage license server, you cannot perform license administration functions using the License Administration Tool on the workstation.

To reconnect to the license server:

1. Wait a few minutes, and then try again to use the License Administration Tool.
2. If the workstation is still disconnected, check whether the network cable is unplugged. For details, see *Network cable unplugged*.
3. If the workstation remains disconnected, check whether a network drive is disconnected. For details, see *Disconnected network drive*.
4. Contact your network administrator.

When the connection is restored, the License Administration Tool returns to normal and you can perform any of its functions.

Related topics...

[Network cable unplugged](#)

[Disconnected network drive](#)

Network cable unplugged

When the network cable is unplugged from your workstation, you cannot perform license administration functions using the License Administration Tool.

To check whether a network cable is unplugged:

1. Check the notification area, at the far right of the taskbar, for this message: **A network cable is unplugged.**
2. If you see this message, reconnect the network cable to the workstation.
3. If you do not see this message, check the network connections.
 - a. Click **Start**, and select **Control Panel > Network Connections**.
 - b. In the **LAN or High-Speed Internet** section, check the **Status** of the **Local Area Connection**.
 - c. If the **Status** is **Network cable unplugged**, reconnect the network cable to the workstation.
 - d. If the **Status** is **Connected**, the network cable is connected to the workstation.
4. Try to use the License Administrator Tool.

Related topics...

[Disconnected from the network](#)

[Disconnected network drive](#)

Disconnected network drive

When your workstation is disconnected from the network drive for the Sage license server, you cannot perform license administration functions using the License Administration Tool.

To check whether a network drive is disconnected:

1. Click **Start**, and select **My Computer**.
2. In the **Network Drives** section, check the **Type** column for the network drive for the Sage license server.
3. If the **Type** is **Disconnected Network Drive**, select the network drive and then select another network drive.
4. If the **Type** changes to **Network Drive**, try to use the License Administrator Tool.
5. If the **Type** remains **Disconnected Network Drive**, contact your network administrator.

Related topics...

[Disconnected from the network](#)

[Network cable unplugged](#)

Chapter 5

License Use and Sage Master Builder

This chapter provides information about the following:

- Specify Sage License Server
- Running Sage Master Builder Connected

Specify Sage License Server

About specifying the Sage License Server

Before you can use Sage Master Builder with your activated license, you have to specify the computer on your network that is the Sage license server. There are two ways to specify the Sage license server.

- [You can select the computer from the list of computers on your network](#) or
- [You can enter the IP Address or name of the computer](#)

Related topics...

[Selecting the Sage license server computer](#)

[Entering the IP Address or name of the computer](#)

[Determining the name of a computer](#)

[Determining the IP Address of a computer](#)

[What is an IP Address?](#)

[What is a server?](#)

Selecting the Sage license server computer

One method is to select the computer running the Sage license server from the list of network computers.

Note:

To use this method of selecting a server from the list of network computers, you have already clicked the appropriate link on the Specify Sage License Server window.

To select the computer running Sage license server from the list of network computers:

1. On the **Select License Server** window from the list of network computers, select the computer running the Sage license server.
2. Click **OK**.

Related topics...

[About specifying the Sage license server](#)

[Entering the IP Address or name of the computer](#)

[Determining the name of a computer](#)

[Determining the IP Address of a computer](#)

Entering the IP Address or name of the computer

One method is to enter the IP Address or name of the computer running the Sage license server.

Note:

To use this method of selecting a server from the list of network computers, you have already clicked the appropriate link on the Specify Sage License Server window.

To enter the IP Address or name of the computer running the Sage license server:

1. In the text box, type the IP Address or name of the computer.
2. Click **OK**.

Related topics...

[About specifying the Sage license server](#)

[Selecting the Sage license server computer](#)

[Determining the name of a computer](#)

[Determining the IP Address of a computer](#)

[What is an IP Address?](#)

Determining the name of a computer

Note:

If you are trying to determine the name of the computer running the Sage license server, you must complete this procedure on that computer.

To determine the name of a computer:

1. Click **Start**, **Settings**, and then **Control Panel**.
2. From the list, scroll to and double-click **System**.
3. The **System Properties** window appears.
4. Locate the line **Full computer name**, and write it down or type it into a note that you can print.
5. Click **Cancel**.

Related topics...

[About specifying the Sage license server](#)

[Entering the IP Address or name of the computer](#)

[Determining the IP Address of a computer](#)

Determining the IP Address of a computer

Note:

If you are trying to determine the IP Address computer running the Sage license server, you must complete this procedure on that computer.

To determine the IP Address of a computer:

1. Click **Start**, then **Run**.
2. In the **Open** text box, type **cmd**, then click **OK**.
3. The **\Windows\...\cmd.exe** window appears.
4. At the prompt, type **ipconfig**.

For example, you might see H:\. Type ipconfig after the drive letter. When you press the ENTER key, the system displays several address, among which is the IP Address of the computer. You see this:

IP Address 172.20.22.142

Related topics...

[About specifying the Sage license server](#)

[Entering the IP Address or name of the computer](#)

[What is an IP Address?](#)

[What is a server?](#)

What is an IP Address?

Every computer connected to the Internet is assigned a unique number known as an Internet Protocol (IP) address. This numeric address of a computer on the Internet is written as a set of four numbers separated by periods (each number can range from 0 to 255). An example of an IP Address is 123.123.4.5.

Note:

If you are trying to determine the IP Address of the computer running the Sage license server, you must complete the procedure on that computer.

Related topics...

[About specifying the Sage license server](#)

[Entering the IP Address or name of the computer](#)

[Determining the IP Address of a computer](#)

[What is a server?](#)

What is a server?

There are many kinds of servers. Some servers are denoted by their hardware configuration and a specialized operating system. Other servers consist of specialized software applications running on standard computers.

Some servers are called “file servers” and may be a powerful computer dedicated to storing files and data. For example, Sage Master Builder company data can be stored on a file server computer. Any Sage Master Builder user on the same network as the file server computer can access and store data there.

A server can also be a software application that provides a specific kind of service to client software running on other computers. The term server can refer to a particular piece of software, such as the Sage license server. A single computer may have several different server software applications running on it, thus providing many different servers to client workstations running on a network.

Running Sage Master Builder Connected

Launching and running Sage Master Builder connected

(This topic presents the perspective of a Sage Master Builder user.)

Note:

If you are having a problem running Sage Master Builder connected, it is very likely a network problem or your computer's connectivity to your network. If problems persist, consult with your local system administrator.

The desired **Sage License Server Connection State** is:

Connected: License use acquired. This connection state allow you to use all the power of Sage Master Builder product that you purchased and licensed. Running connected means that your computer is connected to the Sage license server, and there is a license use available to you.

Prerequisites for a launching and running connected include:

- An activated Sage Master Builder product license. The administrator user activates the product license using the functions of the License Administration Tool.
- A network connection, if you are on a network. This only pertains to working in a network environment and does not pertain to a single computer running in a stand-alone environment.
- The Sage license server that has been specified from the computer running Sage Master Builder.
- An available license use.
- Being a user and having access to a Sage Master Builder company.

To launch and run Sage Master Builder connected:

1. Double-click the Sage Master Builder desktop icon.
2. The **Specify Sage License Server** window appears.
3. Choose one of the following:
 - **Select the Sage license server from the list of computer on your network.**
 - **Enter an IP Address or name of the computer that is the Sage license server.**
4. When you have satisfied the conditions to specify the Sage license server, click **OK**.

Sage Master Builder begins its launch process.
5. (Sage Master Builder Enterprise Edition only) On the **Connect to Sage Master Builder Server** window, select your network and click **OK**.
6. On the **Company List** window, select a company, or click **Cancel**.
7. From the **Company List** window, select a company.

Note:

For more information about the finding your company on the **Company List** window, see the following section.

8. On the **User Name and Password** window, enter your user name and password.
9. Sage Master Builder opens the company.

You are now running Sage Master Builder connected.

About the Sage License Server Connection states

(This topic presents the perspective of a Sage Master Builder user.)

You can view the current connection state to the Sage license server in the **About Sage Master Builder** window. Your connection state is defined by several factors involving your network connectivity and the availability of license uses. The following table presents connection state definitions:

Sage license server connection state	About Sage Master Builder window displays
Connected You have launched Sage Master Builder but not logged in to a company yet.	Connected: License use not acquired.
Connected You have successfully logged in to a company.	Connected: License use acquired.
Connected After a successful login, you have chosen to open a new company, change user name/access, or change the Sage license server.	Connected: License use returned.
Originally connected, later disconnected, now reconnected You have successfully logged in, but you lost connection to Sage license server and the license use has expired. Now you are connected again but when you try to acquire a license use, no uses are available.	Connected: License use lost.
Disconnected You are disconnected at launch or at subsequent log in when selecting a company.	Disconnected: x uses remaining, or Disconnected: One use remaining.
Connected Your educational or trial product has expired.	Activated license has expired.
Connected Your unauthorized product has expired.	The seven-day grace period for license activation has expired.

Note:

If the computer running the Sage license server becomes disconnected from the other computers on your network, or if your computer becomes disconnected from the Sage license server, you may see an alert message from Sage Master Builder telling you that you are disconnected.

Viewing the Sage license server connection state

You can view the current connection state of the Sage license server. This may help you in situations where your Sage license server connection status is not what you expect it to be. Viewing the connection state can help you troubleshoot problems.

To view the Sage license server connection state:

1. From the Sage Master Builder main window, click **Help**, then click **About Sage Master Builder**.

The **About Sage Master Builder** window appears.

2. In the lower right of the window just above the **Close** button, look for **Sage License Server Connection State**.

The text in the box displays the current connection state.

Company List window

About the Company List window

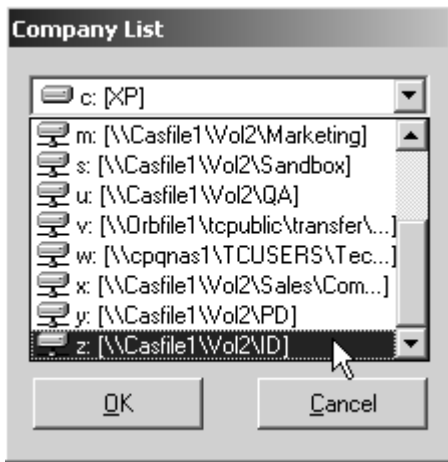
During installation, you have the option to install Sage Master Builder on a specific local drive, such as C:, D:, etc. When you launch Sage Master Builder, the first window (Standard Edition) or second window (Enterprise Edition) that appears is **Company List**. From this window, you select the location of company you want to open, then you select the company itself, and click **OK**.

For example, if you have installed Sage Master Builder and the Sample Company on local drive C:, and this is the first time you have launched the program, then the program displays the local drive, and the Sample Company appears in the list directly below.



In most business situations, the company that you use to manage your business is not located on your local computer. It is located on a server computer on your local network. The server computer could be a dedicated server computer in a client/server configuration or it could be a colleague's computer in the next office using a peer-to-peer configuration.

If you are working in a network environment, clicking the drop-down arrow displays all the local drives and all the network drives that you have access to. In the following graphic, you can see a list of network drives that have been mapped to from this computer.



If you can see the drive in the list, then you can access the Sage Master Builder company located on that drive. If you cannot see the drive where the company is located, then ask yourself these questions. You may have to consult with your network administrator to locate the drive where your company is located.

1. Have you lost your network connection? If you have, then you cannot access network drives and the Sage Master Builder company.
2. Has the server lost its network access or crashed? If that has happened, then you can access the server and the company.
3. Has the company been moved to a different computer and drive? If that's true, then you have to map to the network drive in its new location.

Mapping a network drive to access a company

You may have to map to a network drive to access a Sage Master Builder company if it is not located on a drive on your local computer or it has been moved to a different drive. When you create a Sage Master Builder company on a different network drive, the program creates an \\MB7 folder and the new company under that folder.

For example, you have to map to the Sage Master Builder company located on network drive Z.

To map a network drive:

1. On your Windows desktop, click **Start > Explore**.
2. On the tool bar, click **Tools > Map Network Drive**.
3. On the **Map Network Drive** window, click **Browse**.
4. Locate the drive, and then click **OK**.
5. On the **Map Network Drive** window, click **Finish**.
6. Launch Sage Master Builder.
7. On the **Company List** window, select drive Z.
8. Select the company, and click **OK**.

Related topics...

[About Sage License Server Connection State](#)

[Mapping a network drive](#)

Appendix A

Special Configuration

This appendix provides information about the following:

- Windows Vista Business Operating System
- Windows Server 2003 Operating System
- Windows XP Professional Operating System
- Windows 2000 Servers Operating System
- Windows 2000 Professional (SP2) Operating System
- Citrix and Terminal Servers

Windows Vista Business Operating System

Launching Sage Master Builder to run as administrator for scheduling reports

Important:

On computers running Vista, scheduling Sage Master Builder reports and viewing My Scheduled Reports requires that you to “run as administrator” or to “run the program as administrator,” two similar command.

Microsoft Windows has changed security rules in the Vista operating system to make your computer more secure. If you are running Sage Master Builder as a typical user, then you have limited privileges in some areas of the program, such as saving a report schedule or viewing My Scheduled Reports. So, to save a report schedule or view My Scheduled reports, you must launch Sage Master Builder with the command to either **Run as administrator** or **Run this program as an administrator**.

When you select either command, the settings are limited to you. Your settings to run Sage Master Builder as administrator do not affect the next person who logs on and launches Sage Master Builder from this computer. Your settings on this computer can either be temporary or persistent. For example, when you select **Run as administrator**, you run the program as administrator for that session only. When you select **Run this program as an administrator**, you set program properties to always run the program as administrator when you log on to this computer.

Note:

Run as administrator and **Run this program as an administrator** are not related to Vista operating system user groups but are limited to a specific program you are running.

To set **Run as administrator**:

1. On your Windows desktop, right-click the Sage Master Builder program icon.
2. From the drop-down menu, to launch the program, click **Run as administrator**.

Note:

Selecting Run as administrator only runs the current session of running Sage Master Builder. The setting does not persist.

To set **Run this program as an administrator**:

1. On your Windows desktop, right-click the Sage Master Builder program icon.
2. From the drop-down menu, click **Properties**.
3. On the **Sage Master Builder Properties** window, click the **Compatibility** tab.
4. Under **Privileges Level**, select **Run this program as an administrator**.
5. Click **Apply**, and then click **OK**.

Note:

Selecting Run this program as an administrator always runs the program with these properties when you launch the program on this computer. The setting persists.

Vista and CodeBase Server

Important:

(Sage Master Builder Enterprise Edition only) You cannot install CodeBase Server for Sage Master Builder on a computer running the Windows Vista Business operating system. You can only install it on computers running Windows 2000 or Windows Server 2003.

Running the Sage license server on Vista

Important:

Read this information if you are running Vista business operating system on your office computers.

A computer running the Vista Business operating system cannot be a Sage license server computer for client workstation computers running the Vista Business operating system. Consider using a different computer on your network to be the Sage license server. Any supported operating system can be used in place of Vista, for example, Windows XP.

Vista sleep mode prevents computers from obtaining a license use

Important:

Read this information if you are running Vista business operating system on your office computers.

If a computer running the Vista Business operating system is used as a license server, when it goes into sleep mode other computers on the network can't obtain a license. Possible resolutions are:

- Use a different computer on your network to be the Sage license server. Any supported operating system can be used in place of Vista, for example, Windows XP.
- Set **Sleep Mode** on your license server computer to "Never."

To set the Sleep Mode to "Never:"

1. **Start > Control Panel > System Maintenance > Power Option.**
2. Select **Change when computer sleeps.**
3. From the **Put computer to sleep** list, select **Never.**

Sage licensing cannot auto-start on Vista

Important:

Read this information if you are running Vista business operating system on your office computers.

The Sage Licensing service (i.e. the Sage Service Host) cannot auto-start on computers running the Vista operating system. If the service stops and can't auto-start, the program displays a message advising you to take further action to resolve this issue.

Sage licensing not installed to Vista over network

Important:

Read this information if you are running Vista business operating system on your office computers.

On a computer running the Vista operating system, installing Sage Master Builder by mapping to a network drive does not install the Sage licensing (i.e., the Sage Service Host). To resolve this problem, install Sage Master Builder from the installation Version 13 CD.

Vista displays “Unidentified Publisher” message

Vista displays an “Unidentified Publisher” message when the Sage Master Builder user asks for elevated privileges (for instance, when you request to run the program as administrator). You can click OK and continue without any problems.

Windows Server 2003 Operating System

Note:

Configuration for Windows Small Business Server 2003 is the same as configuration for Windows Server 2003.

Configuring Windows Server 2003 date format

It is necessary when using Windows Server 2003 to configure the date format.

To configure the Windows Server 2003 date format:

1. Click the **Start** button, point to **Control Panel**, then click **Regional and Language Options**.
2. On the **Regional and Language Options** dialog box, on the **Regional Options** tab, click the **Customize...** button.
3. On the **Customize Regional Options** dialog box, click the **Date** tab.
4. Under **Short date**, from the **Short date format** drop-down list, select **MM/dd/yyyy**.
5. Click **OK**.
6. To close **Customize Regional Options**, click **OK** again.

Setting up Windows Server 2003 for PDF and RTF printers

In Windows Server 2003, Standard Edition and Windows Server 2003, Enterprise Edition, the installation of kernel-mode drivers is blocked by default. Before you can install Sage Master Builder PDF and RTF printers with Windows 2003 Server, you have to unblock the installation of the kernel-mode drivers and edit the Group Policy.

To unblock the installation and edit the Group Policy:

1. On your Windows Server desktop, click **Start**, then **Run...**
The **Run** dialog box opens.
2. In the **Open:** text box, enter **gpedit.msc**, and then press **ENTER**.
The **Group Policy** window opens.
3. In the left pane, on the **Tree** tab, double-click the **Administrative Templates** folder.
4. Then double-click the **Printers** folder.
5. In the right pane, in the **Setting** list, find and set the state of the setting for **Disallow installation of printers using kernel-mode drivers** to **Disable**.

Windows XP Professional (SP2) Operating System

Configuring the Windows XP Professional date format

To configure the date format:

1. Click the **Start** button, point to **Settings**, and click **Control Panel**.
2. Double-click the **Regional and Language Options** icon, and click the **Regional Options** tab.
3. Click the **Customize** button and the **Date** tab.
4. In the **Short Date Format** list, select **MM/dd/yyyy**.
5. Click **OK**.

Windows Server 2000 (SP3) Operating System

Configuring Windows Server 2000 Server (SP3) date format

To configure Windows Server 2000 servers:

1. On the **Start** menu, point to **Settings**, then click **Control Panel**.
2. Double-click the **Regional Options** icon.
3. Click the **Date** tab.
4. In the **Short Date Style** list, click **MM/dd/yyyy**.
5. Click **OK**.

Windows 2000 Professional (SP4 or newer) Operating System

Configuring the Windows 2000 Professional date format

To configure Windows 2000 workstations, you first modify the date format and then disable the disk write caching.

To configure the date format:

1. Click the **Start** button, point to **Settings**, and click **Control Panel**.
2. Double-click the **Regional Settings** icon, and click the **Date** tab.
3. In the **Short Date Style** list, click **MM/dd/yyyy**.
4. Click **OK**.

Disabling disk-write caching for Windows 2000 Professional (SP4 or newer) workstations

To configure Windows 2000 workstations, you first modify the date format and then disable the disk write caching.

Important:

When appropriate, disable disk write caching for clients, but **do not** disable disk write caching for servers.

It is necessary to disable the disk write caching for Windows 2000. You can obtain a copy of Microsoft documents Q259716 and Q233541 via fax-back from Microsoft or through their web site at: www.microsoft.com.

This procedure disables the disk write caching only for shared/mapped network drives.

Caution!

Windows 2000's disk-write caching is hardware dependent. If the hardware is old, it may not have the ability to be turned off and may have the potential of causing a loss of data.

Caution!

In situations where the program may be interrupted by a power outage or a system crash, a reliable backup process must be in place to protect your data.

To disable disk write caching:

1. Double-click the **My Computer** icon on your desktop.

2. Right-click your drive icon.
3. Click **Properties**.
4. Click the **Hardware** tab, and ensure that the drive you want to test is selected.
5. Click the **Properties** button and then the **Disk properties** tab.
6. Clear **Write cache enabled**.
7. Click **OK**, then click **OK** again to return to the **My Computer** window.

Caution!

On some computers, disabling the disk write caching is not permanent. To test your computer, follow the instructions above and then restart Windows 2000. Repeat steps 1-6. If **Write cache enabled** is again checked, your hard drive does not support the permanent disabling of disk write caching.

Citrix and Terminal Servers

Using Citrix and Terminal Server with Sage Master Builder

Many people use Citrix and Terminal Server to manage remote access to their local area network (LAN). If Sage Master Builder is installed on the computer running Citrix or Terminal Server and on your laptop, then you may log on to the computer running Citrix or Terminal Server with your laptop and work in Sage Master Builder on your LAN. This enables you to work from home, from a job site, or from any number of other remote locations.

We recommend that you use DOS commands to change the operating mode from “execute” to “install” and then back to “execute.” When using the DOS commands to install, you may install the Sage Master Builder software as you would on any desktop or Windows server operating system that meets Sage Master Builder requirements.

Installing on computers running Citrix and Terminal Server using DOS commands

To install using DOS commands:

1. Click **Start**, then **Run**.
2. On the **Run** window, in the **Open** drop-down box, type **cmd**, and press the **ENTER** key.
The **\Windows\...\cmd.exe** window appears.
3. At the prompt, type **change user /install**, and press the **ENTER** key.
This enables the install mode.
4. Install the Sage Master Builder software as you would on a typical workstation or Windows Server.
5. At the end of the installation process, choose to launch the License Administration Tool.
6. Using the License Administration Tool window, manage your license and activate it.
7. After activation, click **Start**, then **Run**.
8. On the **Run** window, in the **Open** drop-down box, type **cmd**, and press the **ENTER** key.
9. The **\Windows\...\cmd.exe** window appears.
10. At the prompt, type **change user /execute**.
This enables the execute mode, which is the default mode for running Citrix and Terminal Server.
11. Exit the **Run** window.
12. Restart the server.

Important:

- Before users will be able to launch Sage Master Builder through the Terminal Server, the server must be restarted.
- If this message appears: “Install mode does not apply to a terminal server configured for remote administration,” then it is not necessary to enable the install mode. You may install the Sage Master Builder software as you would on a typical workstation.

Appendix B

Sage Master Builder API

This appendix provides information about the following:

Overview of the Sage Master Builder API

Overview of the Sage Master Builder API

About Sage Master Builder API

Important:

The following information is provided to give Sage Master Builder users a brief introduction using the API program. For complete instructions on using the Sage Master Builder API, refer to the *Sage Master Builder SDK Developer Guide* or visit the Developer Network Program:

http://www.sagemasterbuilder.com/services/s_a_mbdn.asp

Sage Master Builder is one of the premier software tools available for the construction industry. However, because there are so many vertical industries within the construction industry as a whole, there are many needs that cannot be entirely fulfilled by a single software program, no matter how rich it is in functionality.

The API (as part of the Software Development Kit, or SDK) has been developed to respond to these needs. It allows third-party developers to create applications with features more precisely targeted for highly specific market segments while at the same time leveraging the substantial functionality already provided by Sage Master Builder. Thus, for example, a project estimation application can integrate with Sage Master Builder in order to use Sage Master Builder accounting and project management features. Such a program has been developed by Sage Timberline Office.

Third-party developers using the API benefit from faster implementation times because they don't need to reinvent all the Sage Master Builder functionality. Third-party developers also benefit because their application can attract the immediate interest of existing Sage Master Builder customers.

To view the product developed for Sage Master Builder using the API, browse to this link:

http://www.sagemasterbuilder.com/products/p_a_overview.asp

API installation and company access

The Sage Master Builder and the API component are installed on the same computer and drive automatically. During installation, a shortcut for the API is placed in the Windows **Start > Programs** list under **Sage Master Builder > Sage Master Builder API**.

The Sage Master Builder application program interface (API) allows you to use third-party programs to perform the same tasks that you would perform when using different Sage Master Builder windows as a typical user. The API allows the third-party program to insert, as well as delete, modify, or retrieve data from one or more existing Sage Master Builder company databases.

Important:

- Using the Sage Master Builder API to access Sage Master Builder company data requires a license use. That is why you must set up an API security group using **7-3-1 Security Groups**.
- Then you have to assign a user to the API security group using **7-3-2 User List**.

When you are using the API to access Sage Master Builder company data, the Sage Master Builder program does not have to be running. The API simply needs some of its files. Similarly, if the target company databases are on another system connected to your system via a network connection, Sage Master Builder need not be present or running on those remote systems, although it can be.

You have to perform several steps in the other program before you can import and export data between programs using the API. For example, you may have to:

- Specify a job cost interface type for databases and/or estimates files as Sage Master Builder
- Identify a specific Sage Master Builder company
- Enter a user name
- Enter a password

System requirements for Sage Master Builder API

If you are using the Sage Master Builder API, the minimum and recommended system requirements may vary. These requirements must be considered in addition to the recommended system requirements for running Sage Master Builder or the Sage Master Builder Enterprise Edition.

It may be necessary to increase the processor speed, memory and/or disk space of your system depending upon the requirements of the third-party application using the API. Please consult with your third-party vendor to determine what changes, if any, should be made to your hardware configuration in order to meet your desired performance criteria.

Installing SDK samples and test programs

All the SDK files are in the \SMBAPI folder on the Sage Master Builder installation CD.

To install SDK samples and test programs:

1. On the installation CD, browse to the \SMBAPI folder.
2. Copy the \SMBAPI folder to the \MB7 folder on your hard drive.

About the Sage Master Builder API Administration window

The Sage Master Builder API Administration window displays several areas, buttons, and menu items.

API Status area - Displays whether or not the API is Not Accepting Requests or is Accepting Requests. Before the API can accept requests, it must be initialized. Clicking [Start] initializes the API.

Configuration area - Three configurations that are controlled by MB Data Drive.

- By default, the API is set to your local drive, for example, C: (XP). The API accesses company data on that drive.
- When you click the drop-down arrow, you see a list of mapped drives. If you select one of these drives, the API accesses a company database on that drive.

- If you select the Access Master Builder Enterprise check box, it opens boxes for setting parameters for Sage Master Builder Enterprise client-server configuration. You can type information for:
 - Server IP – The IP Address or name of the Enterprise server
 - Server Port – The Enterprise server port number
 - User ID – Enterprise server user ID.
 - Password – Enterprise server user ID. Note: No user ID is needed for “public.”

Caution!

You can specify only one drive, mapped drive, or network location for the company databases. If you are not using Sage Master Builder Enterprise and have multiple locations, you cannot dynamically switch between them. Instead, the API executable has to be stopped and restarted for each after selecting the correct drive location.

File > Logging – When this command is selected, (check mark indicator) the API creates an mbapi.log file in the \MB7\Programs folder. It logs instances of:

- Database table locking
- Enterprise roll-back of transactions
- Failure to request or check in a license use

File > Exit – Exit the program.

Edit > Security - Opens **Sage Master Builder API Security Setting** window where you select the objects you want to be available for API applications.

Help > About the API version.

Launching the API and starting the API service

Caution!

You can specify only one drive/mapped drive, or network location for the company databases. If you are not using Sage Master Builder Enterprise and have multiple locations, you cannot dynamically switch between them. Instead, the API Administration service has to be stopped and restarted for each after selecting the correct drive location.

The first time you launch the API Administration program, it registers itself in the Windows registry.

You must launch the API Administration program and start the service manually in order for requests from the program to be processed.

To launch API and start the API service:

1. From the Windows **Start** menu, click **Programs**, point to **Sage Master Builder**, then click **Sage Master Builder API**.

The **Sage Master Builder API Administration** window appears.

2. By default, Sage Master Builder expects the company databases to be on drive C : \ . Do one of the following:
 - If the company databases are on another hard drive or mapped network drive, click the drop-down list button for the **MB Data Drive** text box, and select the appropriate drive.
 - (Sage Master Builder Enterprise Edition only) If the company databases are located at a networked location on a server, do the following:
 - i. Select the **Access Sage Master Builder Enterprise** option box.
 - ii. Specify the Sage Master Builder server's IP address, Server Port, User ID, and Password supplied to you by your Sage Master Builder server administrator.
For more details about launching the API and starting the API service when running Sage Master Builder Enterprise Edition, see the Enterprise Edition Help under 7-Utilities.

3. Click **Start** to start the **API** service.
4. If you have not already configured the API security settings, do so now. By default, SDK access to Sage Master Builder objects is disabled until you configure the API security settings.

Important:

- By default, API access to Sage Master Builder objects is disabled until you configure the program.
- The meaning of “service” in Sage Master Builder API does NOT connote “service” in Windows 2000 Professional, and Windows XP Professional system service.

States of the API

There are three distinct states of the API:

- The API has not been launched.
- The API has been launched, but the API service has not started.
- The API has been launched and the API service has been started.

In the first case, if the application tries to access the API, an error message will be returned to the application stating that there has been an automation error.

In the second case, if the application tries to access the API, an error message will be returned to the application stating that it is not accepting requests.

Important:

- By default, API access to Sage Master Builder objects is disabled until you configure the API.
- The meaning of “service” in Sage Master Builder API does NOT connote “service” in Windows 2000 Professional, and Windows XP Professional system service.

Configuring the API security settings

By default, the API service has all Sage Master Builder object types disabled. You need to launch the API Administration window and select the objects that you want to enable for SDK access. A good general policy is to be as restrictive as possible.

The selections are specific to the machine that you are configuring. The settings will be the same for all company databases that are accessed via the API Administration window.

To configure the API service:

1. Launch the Sage Master Builder API.
2. On the **Sage Master Builder API Administration** window, from the **Edit** menu, click **Security**.
3. On the **Sage Master Builder API Security Settings** window, select the Sage Master Builder objects to which you want to allow access.
4. Click **Save Settings**.

Important:

While a Sage Master Builder customer is actively configuring the security settings for objects that can be accessed by the API, no requests can be processed by the API program.

Notice that this setting merely enables access at the API service-level. That is, it does not override any security settings in Sage Master Builder itself. Any form-level, field-level, or user-level restrictions set there will still be in effect.

This configuration enables the selected objects at the API service. You must also activate SDK access at Sage Master Builder as described in the next section.

Notice that these instructions are provided to help you configure your system during development and testing. You cannot enforce any particular settings at your customer's installation, but must inform the customer which settings are required.

For complete information about configuring the API Service, see the *Sage Master Builder SDK Developer Guide*. For more information about joining the Sage Master Builder Developer Network Program, browse to this link

http://www.sagemasterbuilder.com/services/s_a_mbdn.asp

Appendix C

Enterprise Installation and Setup

This appendix provides information about the following:

- Installation and Setup Guidelines
- Installation Steps and Procedures

Installation and Setup Guidelines

Pre-installation information

The Sage Master Builder program has two editions, Standard and Enterprise. Sage Master Builder Enterprise provides many features that are beneficial for customers with complex environments that may include remote connections, many simultaneous users, and/or multiple companies.

The product features of the Enterprise Edition are contained in your Sage Master Builder product license. When you activate your license and launch the License Administration Tool, you see in the **Product or Feature** column, **Sage Master Builder - Ent.** This indicates that your Enterprise Edition is licensed and activated. Evidence of your Enterprise Edition license also appears in the title of your product in view from **Help > About Sage Master Builder.**

To run the Sage Master Builder program as the Enterprise Edition, two additional programs must be installed on the server. These programs are CodeBase Server for Sage Master Builder and CodeBase Administrator for Sage Master Builder.

All editions of Sage Master Builder are installed with the License Administration Tool for Sage Software products. This program manages your product license attributes along with the Sage license server.

If you are an existing Enterprise Edition customer, then the CodeBase software is already installed and running on your server. During the installation process, you will not need to re-install the CodeBase software. If, however, you are a new Enterprise Edition customer, then you will be installing the two CodeBase programs along with your Sage Master Builder software. These two CodeBase programs are contained on a second CD containing only that software and no Sage Master Builder program software. Providing the CodeBase software on a separate CD provides the means for loading the programs on other computers on your network.

It is very important to install the programs and perform the installation tasks in a very specific order. In addition to the four main program installations, there are several intermediate tasks to complete before, during, and after the installation of the software.

We recommend that the following issues be taken into account for a smooth and successful installation experience:

Caution!

Sage Master Builder and/or its components do not run on or are not supported by some operating systems. Do not install Sage Master Builder to computers running these operating systems:

- Windows 95
- Windows 98
- Windows NT Server
- Windows NT Workstation

Caution!

For current Sage Master Builders customers: When you reinstall or upgrade, turn off scheduled reports. Reports must not be printed, faxed, or emailed at the same time as your re-install or upgrade.

Caution!

For current Sage Master Builder customers: Do **not** upgrade or reinstall Sage Master Builder while the Sage Master Builder API is running.

Important:

- Customer Support recommends that you complete all installations and configuration of the server before you begin installing Sage Master Builder to the client computers.
- The programs, CodeBase Administrator for Sage Master Builder and CodeBase Server for Sage Master Builder, are now located on a separate Enterprise installation CD.
- Existing Sage Master Builder customers: Before you install, make a backup copy of your existing company data.
- Before installing Sage Master Builder software, shut down all other programs except firewall or antivirus software.
- You must have administrator rights on the network and administrator rights on each computer to install Sage Master Builder software. Administrators have full control over computers for installing software.
- When installing the software, log on to Sage Master Builder as the supervisor.

Duration of the installation process

Plan on at least 10 and possibly up to 20 minutes per computer to install Sage Master Builder and its companion software, such as the Sample Company and the License Administration Tool. The duration of the Sage Master Builder installation depends a great deal upon each computer's configuration. For example, some newer computers are pre-installed with essential software required to run Sage Master Builder software such as the .NET Framework and the Windows Installer 3.1. Installation to some older computer may take more time.

Other required software

Both Windows Installer 3.1 and the Microsoft .NET Framework 2.0 must be installed on all computers running Sage Master Builder software. First, the installer determines if the .NET Framework 2.0 and the Windows Installer 3.1 are already installed. If not, the installer installs the required software automatically.

Important:

If you need to install Windows Installer 3.1, then the computer must restart before you continue with the Sage Master Builder installation. After your computer restarts, opening and closing your CD drawer with the installation CD in it should restart the Sage Master Builder installation. If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select SageMasterBuilder.exe. Then click **OK**.

Plan for an additional 10 to 15 minutes per computer to install .NET Framework 2.0 and Windows Installer 3.1 on each computer.

Product CDs

You need the product CD to install the Sage Master Builder Enterprise software. You will also the product CD to install the CodeBase Server and Administration software.

Installation and Internet connectivity

Internet access is not required when you install Sage Master Builder.

Installation environments, operating systems, and services

It is very important that you understand the network environments and operating systems on the computers and server computers where you install Sage Master Builder software. For more information, see [Chapter 2, System Requirements and Configuration](#).

Installation options

When you load the Sage Master Builder CD into your CD drive, the **Welcome to Sage Master Builder Installation** window opens. You are presented with two options.

- **This computer will be my Sage license server.** Choose this option to install the Sage license server on the computer that is your network server. You only need to install this option one time on your network. This is the computer on which you activate your license.

- **This computer will run Sage Master Builder only.** You may install Sage Master Builder on as many computers as you like. Following each Sage Master Builder installation, you must specify the computer on your network that is the Sage license server.

Installing the Sample Company

The Sample Company is pre-selected to be installed with all Sage Master Builder software installations. We recommend that you install the Sample Company because it provides an example of realistic company data being used in Sage Master Builder. It is also used extensively in Sage Master Builder training classes.

Important:

Installing the Sample Company overwrites any previous installations of the Sample Company.

Installation Steps and Procedures

Installation steps overview

Following are the 14 steps that take you through the Master Builder Enterprise Edition installation. They involve many different procedures, some of which appear within the step itself and some of which appear in Sage Master Builder Help.

Step 2 installs the Sage license server. In addition, it also installs Sage Master Builder. Some of the subsequent steps involve following procedures that are part of the Sage Master Builder in-product Help system. These procedures are identified for you so that you can locate them in the Sage Master Builder Help system.

The name of the topic is provided as well as a Help search shortcut.

To locate the Help topic needed for this installation process:

1. Launch Sage Master Builder, and from the menu bar, click **Help > Contents and Index**.
2. In the left pane of the Help viewer window, click the **Search** tab.

3. Copy and paste, or type the Help search shortcut in to the text box and click **List Topics**.

The Help viewer lists the topic

4. Click the topic title in the list.

The Help topic opens in the right pane of the Help viewer window. From here you can print the topic, or you can read and follow it on-screen.

Step 1 - Configure your server

Before you begin to install any programs, make sure your server hardware meets the system requirements and that you have configured it to run Sage Master Builder Enterprise.

Important:

- Your server must have a fixed or permanent IP Address. This requires manual configuration of the server.
- We cannot recommend specific server configuration. This must be determined by your system administrator.

Step 2 - Install Sage license server to the server

For detailed instructions about install Sage license server, see page 31, “Installing the Sage license server” in this guide.

Important:

- Sage Master Builder Enterprise software, CodeBase Server for Sage Master Builder software, and CodeBase Administrator for Sage Master Builder software must be installed on the same drive of the same computer (the server).
- Write down your administrator user password and keep it in a safe place.
- Write down the name and IP Address of the Sage license server computer. You will need to refer to these later.

Step 3 - Log on to the License Administration Tool

Launch the **License Administration Tool**, set your administrator user password and log on as the **Administrator**.

Logging on as the **Administrator** allows you to enter your product keys and activate your product license. For detailed instructions, see pages 39 to 41 in the *Sage Master Builder Installation and License Administration Guide*.

Step 4 - Activate your product license

Using the License Administration Tool, activate your product license on the server. For detailed instructions, see pages 45 to 47 in this guide.

Step 5 - In Sage Master Builder, rebuild the indexes on any existing databases

Note:

If this is a first-time installation, you can skip this step.

Rebuilding the databases is performed from the **7-4 Rebuild Indexes** window in Sage Master Builder. The topic name is “Indexing the database.”

Step 6 - Add all companies to the Server Company List

In Sage Master Builder using the **7-8 Server Company List** window, add all your companies to the Company Server List. The topic name is “Adding companies to the 7-8 Server Company List.”

Step 7 - Install CodeBase Server for Sage Master Builder to the server

Caution!

The CodeBase Server for Sage Master Builder software must be installed on the same hard disk drive as the Sage Master Builder Enterprise software.

Install the program from the CodeBase CD, which contains the both CodeBase programs, CodeBase Server for Sage Master Builder and CodeBase Administrator for Sage Master Builder.

To install CodeBase Server for Sage Master Builder on the server:

1. Insert the CodeBase software CD into your CD-ROM drive.
2. Autorun launches the installation menu.
3. Select **Install CodeBase Server for Sage Master Builder**, and follow the instructions.

Important:

- CodeBase Server for Sage Master Builder is installed as a service, but it must be started manually. Click the desktop icon to start the service.
- You may be required to restart the server after installing CodeBase Server for Sage Master Builder.

Step 8 - Install CodeBase Administrator for Sage Master Builder to the server

Install the program from the Enterprise installation CD, which contains two programs, CodeBase Server for Sage Master Builder and CodeBase Administrator for Sage Master Builder.

To install CodeBase Administrator for Sage Master Builder on the server:

1. Insert the CodeBase software CD into your CD-ROM drive.
2. Autorun launches the installation menu.
3. Select **CodeBase Administrator for Sage Master Builder**, and follow the instructions.

More Help topics about this general subject are located in Sage Master Builder Help, “Appendix I - Enterprise Installation and Setup” and provide more information.

Step 9 - Launch CodeBase Server and then launch CodeBase Administrator and finally connect to the server for the first time

Important:

- The procedure for connecting to CodeBase Administrator for Sage Master Builder for the first time is different from connecting to it on subsequent occasions.
- Confirm that your Password and Port ID are correct.

To connect to the server for the first time:

1. Launch CodeBase Administrator for Sage Master Builder.
2. From the **File** menu, select **Connect**.
3. In the **Server Name** text box, enter **localhost**.
4. In the **Account Id** text box, enter **ADMIN**.

No password is necessary when connecting to the server from CodeBase Administrator for Sage Master Builder for ADMIN account.

5. Click **Connect**.

More Help topics about this general subject are located in Sage Master Builder Help, “Appendix I - Enterprise Installation and Setup” and provide more information.

Step 10 - Confirm and/or change your settings through Server Settings

Confirming and/or changing your setting through Server Settings is done using the CodeBase Administrator window. The procedure for doing it in is the Help topic “Configuring the Server Settings for CodeBase Administrator.”

Step 11 - Set up user accounts through Account Management

Confirming and/or changing your setting through Server Settings is done using the CodeBase Administrator window. The procedure for doing it in is the Help topic “Adding new accounts.”

Step 12 - Install Sage Master Builder to each client

Important:

Before installing to the Clients, you must set up each user in Account Manager.

Install Sage Master Builder to each client workstation. For detailed instructions about install Sage license server, see page 34, “Installing Sage Master Builder” in this guide.

Step 13 - Specify the Sage license server from each client workstation

Note:

Before you can run Sage Master Builder on client workstations, you have to specify the computer on your network that is the Sage license server.

From each client workstation, launch Sage Master Builder and specify the Sage license Server.

For detailed instructions about install Sage license server, see pages 54 to 57, “Specify Sage License Server” and pages 58 - 61 “Running Sage Master Builder Connected” in this guide.

Step 14 - Set up and configure CodeBase Server connections for each client

In Sage Master Builder using a **File** menu command. The topic name is “Configuring CodeBase Server connections for new clients.”

Glossary

Glossary definitions

This glossary provides definitions of key terms used in Sage Master Builder and License Administration Tool.

administrator user

When you log on the License Administration Tool as the **Administrator**, you have access rights to all the License Administration Tool functions. These functions include product license management functions such as activating, adding, and updating. They also include managing license groups, license use, and license reservations.

If you are not the **Administrator**, you can launch the License Administration Tool window and log on as **Other (View only)** and review information it. Only the **Administrator**; however, has the rights to use the window to manage licenses.

Important:

To use the license management functions available with the License Administration Tool, the Windows user must have administrator rights on the computer running the License Administration Tool software. Computer administrators are members of the Administrators group and have full control over the computer, such as installing software and full access to other user accounts.

administrator password

Before logging in to the License Administration Tool the first time as the **Administrator**, you must set and enter the administrator password using the **Logon Administrator Password** window.

Important:

We recommend that you write your **Administrator** password down and keep it in a convenient place. If you forget it, it can only be re-established through contact with Customer Support at 800-866-8049.

API

API is an acronym for application programming interface. Sage Master Builder delivers an API with its software package. The API defines the complete methods by which programmers can access and control Sage Master Builder to build programs that integrate with Sage Master Builder and extend its capabilities.

Programmers interested in developing APIs are invited to join the Developer Network Program. For information, browse to this link:
http://www.sagemasterbuilder.com/services/s_a_mbdn.asp

To review existing APIs that have been developed for Sage Master Builder, browse to this link:
http://www.sagemasterbuilder.com/products/p_a_overview.asp

client workstation computer

Computer connected by a network to the Sage license server. Client workstations run Sage Master Builder.

company folder

A folder that contains all database information for a Sage Master Builder company. The company folders are located under the \MB7 folder, which is accessible via Windows Explorer.

computer name

The name by which the local area network identifies a server or workstation. Each computer name on the network is unique.

If you have activated floating use licenses, the **Current users of the product or feature** grid on the **License Administration Tool** window displays the computer names for the users that are currently using the selected product or feature.

exclusive access

While users in a network environment can simultaneously work in the same company folder to access company data, some operations require “exclusive access” or access by a single user to protect the data. Exclusive access is extremely important, for example, when rebuilding indexes or closing the accounting at the fiscal year-end.

firewall

A firewall is a device and/or software program that guards the entrance to a private network and keeps out unauthorized or unwanted traffic. The integrity of this protective barrier depends on the effective deployment, configuration, and capabilities of individual firewall devices.

When you install programs on a computer that is running a firewall, you see alert messages from the firewall about allowing the new program to access the Internet, to access privileged resources, and/or to act as a server. It is best to grant access to new programs that you are installing, such as Sage Software License Administration Tool and Sage Master Builder.

hardware failure (of the computer running the Sage license server)

A hardware problem can cause the computer running the Sage license server to fail. If that happens, you have to re-install the Sage license server on a different computer on your network and re-activate your product license. Then you have to go to each computer running Sage Master Builder and from there specify the new computer on which you have installed the Sage license server.

IP address

Every computer connected to the Internet is assigned a unique number known as an Internet Protocol (IP) address. This numeric address of a computer on the Internet is written as a set of four numbers separated by

periods (each number can range from 0 to 255). An example of an IP address is 123.123.4.5.

License Administration Tool for Sage Software Products

The License Administration Tool for Sage Software allows you to view and to manage your Sage Master Builder product. Using the License Administration Tool, you can import license files, activate licenses, reserve the use of products and features, and monitor the use of products and features. This tool supports site licenses and floating use licenses.

License Administration Tool - Available Uses column

Indicates of the number of uses for a product or feature that are available to users.

The **Available Uses** column on the **License Administration Tool** window indicates the uses available for all users.

If you reserved the use of products and features for a floating use license, the **Available** column in the **Summary of product or feature use** grid displays the available uses for each group and the available uses that are unreserved.

License Administration Tool - Product or Feature column

The **Product or Feature** column on the **License Administration Tool** window lists the names of the products and features for which you have or had a license.

License Administration Tool - Product or Feature use

Product or feature use indicates the number of people who can use a product or feature simultaneously. The **Total Uses** column on the **License Administration Tool** window displays this information.

For floating use licenses that support reservations, the **Summary of product or feature use** grid displays in the **License Administration Tool** window.

You can have both reserved and unreserved uses.

License Administration Tool - Product line

The **Product Line** column on the **License Administrator Tool** window lists the Sage Software product line for which you have permission to view the licensing information. For example, Sage Timberline Office and Sage Master Builder are product lines.

Note:

This column is hidden by default. To display it, right-click a column heading in the grid and select **Hide/Show Columns** > **Product Line**.

License Administration Tool - Reservations allowed

Some floating use licenses allow you to reserve product or feature uses for individual users and groups. Site licenses, however, do not allow reservations.

If a license for a product or feature allows reservations, the **Reservations Allowed** box is selected.

Note:

This column is hidden by default. To display it, right-click a column heading in the grid and select **Hide/Show Columns** > **Reservations Allowed**.

License Administration Tool - Reserved

Indicates that you have assigned uses of a product or feature to a group.

Note:

Group reservations are available only for some floating use licenses. They are not available for site licenses.

For floating use licenses that support reservations, the **Summary of product or feature use** grid in the **License Administration Tool** window displays the number of reserved and unreserved uses for the selected product.

When a user logs in to a Sage Software product or feature, the Sage license server assigns the user to the first available group to which the user belongs. That is, it reserves the use of that product or feature for the individual.

License Administration Tool - Reserved for

For floating use licenses that support reservations, the **Summary of product or feature use** grid in the **License Administration Tool** window displays the names of the groups for the selected product or feature in the **Reserved For** column. If you have not reserved all the uses, the **Reserved For** column displays unreserved uses as well.

Note:

Group reservations are available only for some floating use licenses. They are not available for site licenses.

License Administration Tool - Reserved under

For floating use licenses that support reservations, the **Summary of product or feature use** grid in the **License Administration Tool** window displays the names of the groups for the selected product or feature in the **Reserved Under** column.

If you have not reserved all the uses or if the license does not support group reservations, the **Reserved Under** column displays unreserved uses.

Note:

The **Current users of the product or feature** grid displays only after you activate floating use licenses. It does not display for site licenses.

License Administration Tool - Status column

The **Status column** on the **License Administration Tool** window lists the statuses of the licenses. The license statuses are **Not Activated**, **Activated**, and **Expired**.

License Administration Tool - Total Uses column

Indicates the number of people who can use a product or feature simultaneously.

The **Total Uses** column on the License Administration Tool window indicates all the uses, whether in use or available, for a product or feature.

If you reserved the use of products and features for a floating use license, the **Total** column in the **Summary of product or feature use** grid displays the total number of uses for a product or feature by group and the total number of uses in the pool of unreserved uses.

License Administration Tool - Unreserved

Indicates that you have not assigned all the uses of a product or feature to a group.

For floating use licenses that support reservations, the Summary of product or feature use grid in the License Administration Tool window displays the number of reserved and unreserved uses for the selected product.

When a user logs in to a Sage Software product or feature, the Sage license server assigns the user to the first available group to which the user belongs. If no group reservations are available, the Sage license server grants the user a reservation from the pool of unreserved uses. That is, it reserves the use of that product or feature for the individual.

License Administration Tool - User name

The name that an individual uses to log in to a Sage Software product or feature.

If you have activated floating use licenses, the **Current users of the product or feature** grid on the **License Administration Tool** window displays the user names for the people that are currently using the selected product or feature.

License Administration Tool - Version

The number that identifies the release of the selected Sage Software product or feature.

For the Sage Master Builder product line, the **Version** column on the **License Administration Tool** window displays **All**. This indicates that you have a license for all versions of the selected product or feature.

For example, for the Sage Master Builder product line, **All** indicates that you can use Sage Master Builder 12 and later.

license

A legal authorization from Sage Software to use the product or feature.

Sage Software grants floating use licenses and site licenses. Some floating use licenses allow reservations.

License Types include **Floating Use** and **Site**.

License Statuses include **Activated**, **Not Activated**, and **Expired**.

A license expires if:

- It has not been activated within the grace period.
- It has been activated, and the license agreement states that it expires.

Refer to the end-user license agreement for details about the terms and conditions of your license.

license - expiration date

The date on which the Sage Software product or feature stops functioning.

If applicable, the **Expiration Date** column on the License Administration Tool window lists the date that the license for a product or feature expires. The license for a product or feature has an expiration date if one of the following statements is true:

- You have not activated the license within the grace period.
- You have activated the license, and the license agreement states that the activation is for a limited time.

Otherwise, the license does not expire and the **Expiration Date** is **None**.

license - floating use

A floating use license restricts the number of simultaneous users of a product or feature. Each person must obtain a use for a product or feature from a finite set of uses.

When a user logs in to a Sage Software product or feature, the Sage license server determines whether a use is available on your network. If so, it assigns a floating use to the person.

You can reserve some floating use licenses for individual users and groups.

license - grace period

The period of time that between installing the product and activating the license.

For the grace period to take effect, the License Administration Tool must be installed and the product keys added or updated, but your license is not yet activated. The grace period for Sage Master Builder lasts seven days.

license - in use

Indicates of the number of people that are using a product or feature.

The **In Use** column on the **License Administration Tool** window indicates all users who are using a product or feature.

If you reserved the use of products and features for a floating use license, the **In Use** column in the **Summary of product or feature use** grid displays the number of users who are using a product or feature in each group and the number of users with a use from the pool of unreserved uses.

license - in use since

If you have activated floating use licenses, the **Current users of the product or feature** grid on the **License Administration Tool** window displays the date and time that the user logged in to the product or selected the add-in feature

license - product

A product license defines your Sage Master Builder product attributes. For example, your license number contains information about your version of Sage Master Builder, any Add-on modules, and the number of license uses that you have purchased.

license - reserved

A license use that has been assigned to a specific license group in the **License Administration Tool** window and defined in the Sage Master Builder **7-3-2 User List** window.

When you log in to a Sage Master Builder company, the Sage license server first checks reserved licenses in the license group to which you belong. If no more license uses are available from that license group, you may be assigned an unreserved license use if one is available.

In Sage Master Builder, supervisor users can acquire any license use, reserved or unreserved, that is not currently in use.

license - site

A site license allows an unlimited number of people on the same network to use a product. Site licenses do not require reservations. An example of a site license product is the **Sage Master Builder estimating module license**.

license - unreserved

A license use that has not been assigned to a license group or user.

If no more reserved license uses are available from the license group to which you belong, then the Sage license server assigns you an unreserved license use, if one is available.

license status - activated

An Activated status for a license indicates that you can use this Sage Software product or feature, such as Sage Master Builder.

After adding or updating a license, you must activate it. Activation verifies that the Sage Software product or feature is a legal copy and is installed in compliance with the end-user license agreement.

license status - expired

An **Expired** status for a license indicates that you can no longer use the product or feature. The product or feature stops functioning on the expiration date. A license expires if one of the following statements is true:

- You do not activate the license during the grace period.
- You activated the license, and the license agreement states that activation is for a limited time.

license status - Not Activated

A **Not Activated** status for a license indicates that you added or updated a license but have not activated it. For a short grace period, you can use a product without activating it. The grace period for Sage Master Builder license is seven days.

license use

License uses define the number of people who can work in Sage Master Builder on your company network simultaneously. For example, let's suppose that you have purchased 10 license uses with your product license. With 10 license uses, 10 people can be logged in to Sage Master Builder at the same time through your network.

Even if you install Sage Master Builder on, for example, 50 computers, the Sage license server will only assign 10 license uses at the same time. If you are the eleventh person who tries to log on to Sage Master Builder, you will see a message telling you that no license uses are available and to try again later.

You can manage your license use reservations through the **License Administration Tool** window.

license use - acquired

There are several preconditions for acquiring a license use.

- Your product license has been activated.
- A network connection exists between the computer running the Sage license server software and your workstation computer running Sage Master Builder.

- You have specified the Sage license server computer on your network from your computer running Sage Master Builder.
- You have access to and rights in a Sage Master Builder company.
- A license use is available.

When you can launch Sage Master Builder and log in to a Sage Master Builder company, you have acquired a reserved license use from a license group or an unreserved license use.

When you exit a Sage Master Builder company or the Sage Master Builder program, the license use is returned to the license group or the unreserved license uses. If you switch between two Sage Master Builder companies, your license use is returned, then re-acquired.

license use - returned

When you exit a Sage Master Builder company or the Sage Master Builder program, the license use is returned to the license group or the unreserved license uses. If you switch between two Sage Master Builder companies, your license use is returned, then re-acquired.

If you experience a computer or network failure, Sage Master Builder does not have a chance to return your license use as usual. After a certain period of time, your license use is automatically returned to the license group or the unreserved license uses.

local area network (LAN)

When two or more computers are connected and communicating with each other, and they are in close proximity, then you are operating in a local area network (LAN) environment.

Sage Master Builder is engineered to run in a LAN environment or a stand-alone environment.

(dot) .NET Framework

The Microsoft .NET Framework is a platform for building, deploying, and running Web Services and applications. It is required to be installed on computers running Sage Master Builder. During Sage Master Builder installation, if the .NET Framework 2.0 is not found, it will be installed automatically.

network

A group of computers connected by a telecommunications link that allows them to share information. A network may be wired or it may be wireless. Two types of networks are local area network (LAN) and large area network (WAN). The Internet is a WAN.

product

The Estimating add-on module is a Sage Master Builder product.

product key

Letters and numbers that identify the license for a product or feature. Part of the license activation process involves entering your product key or keys into text boxes in the License Administration Tool.

Sage license server

The computer in your network that manages the licenses for Sage Master Builder. It becomes the Sage license server when the License Administration Tool software is installed on it, and you import the license file or enter your product keys. In a network environment, the computer running the Sage Master Builder must be connected to the computer running the Sage license server.

Sage License Server Connection State - connected

Sage Master Builder has been engineered to run connected to the computer on your network that is the Sage license server. The Sage license server stores information about your product license.

For example, it stores license activation status, type of license, add-on module licenses, and number of users allowed to use the Sage Master Builder program simultaneously. When your client workstation computer is connected to the Sage license server software, then the Sage Master Builder program runs connected.

Sage License Server State - disconnected

If the conditions for running Sage Master Builder connected are not met, you can run the program disconnected. While you are disconnected, you can only open a Sage Master Builder company with exclusive access.

You are not connected to the company data stored on the server when you are working in a network environment.

For example, you have been running Sage Master Builder connected, but you lose your network connection. When you launch and run Sage Master Builder the next time, your computer cannot communicate with the Sage License server computer. An alert message window displays the message **Unable to connect to the Sage license server. You have 9 more uses before you must reconnect.**

If you don't see the "unable to connect" message at a subsequent launch of Sage Master Builder, you know that your connection with the Sage license server has been re-established.

Each time you launch Sage Master Builder and acquire a license use, the clock for running Sage Master Builder disconnected resets to 9 more times with this current launch representing the 10th time.

If you launch Sage Master Builder 10 times without a connection to the computer running the Sage license server, then Sage Master Builder becomes locked. The only available option at that point is to launch Sage Master Builder, click **File > Specify Sage License Server**, and follow the instructions for specifying and reconnecting to the Sage license server.

server

There are many kinds of servers. Some servers are denoted by their hardware configuration and a specialized operating system. Other servers consist of specialized software applications running on standard computers.

Some servers are called file server computers and may be dedicated to storing files and data. For example, Sage Master Builder company data can be stored on a file server computer. Any Sage Master Builder user on the same network as the file server computer can access and store data there.

A server can also be a software application that provides a specific kind of service to client software running on other computers. The term can refer to a particular piece of software, such as the Sage License Server software. A single computer may have several different server software

applications running on it, thus providing many different servers to client workstations running on a network.

Session ID

A unique number that indicates a remote connection for this user name and computer name. Each remote connection requires a use of the product or feature.

If you have activated floating use licenses, the **Current users of the product or feature** grid on the **License Administration Tool** window displays the session IDs for the users that are currently using the selected product or feature.

For example, if a user logs in to a Sage Software product through Windows Terminal Services, a **Session ID** displays for that user.

stand-alone environment

A stand-alone environment implies that you are running the Sage license server and Sage Master Builder on a single computer. No other computers running Sage Master Builder are connected to the Sage license server computer via a network.

supervisor user

When you log in to a Sage Master Builder company as the supervisor user, you have access to the entire program. The following is a list of actions you can only perform when logged in to the program as supervisor:

- Create security groups.
- Grant access-rights to security groups for windows and items within windows such as text boxes, lists, and grid columns.
- Create user names and passwords, and assign user names to security groups.
- Create new companies.
- Convert data for use in Sage Master Builder.
- Make and save changes to the General Ledger Setup.
- Close the accounting at the fiscal year-end.

- Close payroll at the calendar year-end.
- Restrict posting to specific posting periods in various accounting processes.
- Create new companies

Terminal Services

Windows Terminal Services is a component of Microsoft Windows Server. Terminal Services consists of a terminal server and one or more remote workstations. It allows users to access programs or data stored on a remote computer by a phone, network, Internet connection, or other communication methods.

Remote network connections do not provide adequate bandwidth to run Sage Software products without the use of Terminal Services. Terminal Services provides remote users with a stable and well-performing experience with Sage Software products.

user name

User name is the name with which you log in to a Sage Software product such as Master Builder. If you have activated floating use licenses, the **Current users of the product or feature** grid on the **License Administration Tool** window displays the user names for the people that are currently using the selected product or feature.

In the License Administration Tool, the key user name **Administrator** user. Only the **Administrator** user has special rights to manage the product license using the **License Administration Tool** window.

User names define access to Sage Master Builder companies and have to be established in a Sage Master Builder company by a supervisor user. Every time you create a new company, you have to create a list of user names on the **7-3-2 User List** window.

wide area network (WAN)

A WAN is a computer network that spans a relatively large geographical area. Typically, a WAN consists of two or more local-area networks (LANs). Computers connected to a wide-area network are often connected through public networks, such as the telephone system and with the security of virtual private networks (VPN).

For information about running Sage Master Builder in a WAN, contact your Business Partner or Sage Certified Consultant.

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