Sage Estimating Essential v19.12

Installation and Administration Guide

August 2020

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Introduction

Sage welcomes you to Sage Estimating.

Read the supporting documentation carefully to make sure you understand the process before you install and configure Sage Estimating.

- This *Installation and Administration Guide* includes a system overview, installation and configuration instructions, and information about managing your Sage Estimating license.

- The *Release Notes* provide details about new features, database changes, known issues, and fixes.

- The *Getting Started Guide* provides an operational overview of the Sage Estimating software.

- The *Sage 100 Contractor Integration Guide* describes how to integrate Sage Estimating with Sage 100 Contractor, making certain data in that program available in Sage Estimating, and it explains how to use the interface wizards to send proposals, budgets, and change orders you create in Sage Estimating to Sage 100 Contractor.

- The *Sage 300 Job Cost Integration Guide* provides installation, setup, and operating instructions for Sage 300 Job Cost integration.

- The *Means Integration Guide* provides installation, setup, and operating instructions for Means Integrator.

> **Notes:**
>
> - For current information about supported operating systems, Internet browsers, Microsoft$^®$ SQL Server$^®$, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 101824, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=101824.
>
> - Documentation for all supported versions of Sage Estimating (SQL) is available at http://cdn.na.sage.com/Docs/en/customer/estimating/DocumentationEss.htm.
>
> - Documentation for all supported versions of Sage 100 Contractor is available at http://cdn.na.sage.com/docs/en/customer/100contractor/Documentation.htm.

Conventions Used in this Document

This document uses the following conventions:

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

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

- Names of keys are also shown in bold font. For example: **Enter** or **Tab**. A plus sign (+) between two key names indicates you should press the keys simultaneously.

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

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

Notes, Tips, and Cautions

Note: This style shows that the information supplements the adjacent text.

Tip: This style indicates helpful points about using the software.

Caution! This style indicates important information to help you avoid a loss of critical data.

Important! This styles indicates critical information that you need to understand or important steps you need to take.

Menu Paths

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

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

Ways to Get Help

Use Sage Estimating Help or a variety of self-help resources to get answers to your questions. You can also call Customer Support.

The Help System

Sage Estimating Help provides more efficient access to information than most manuals. With a click of the mouse or a keystroke, you can easily get Help for a command, a field, a window, or a procedure.

Sage Estimating displays Help in your default browser. If you have an Internet connection, it displays the most current Help for your version of Sage Estimating available from a hosted Help server. If you have no connection (you are working offline), it displays Help that was current when the software was released, and is installed on your computer when you install Sage Estimating.

> **Important!** Because the Microsoft Edge browser does not display locally installed help properly, we recommend that you select a different default browser when working offline.

To get Help on a window option

To display Help for an option in a window, do one of the following:

- Click ⓦ **What's This?** on the toolbar or on the title bar, and then click the option.
- Select **What's This?** from the **Help** menu, and then click the option.
- Select the option, and then press F1.

To get Help for the whole window

For information about the window, such as the window's purpose and what tasks you can perform in it, click [**Help**] at the bottom of the window.

The Window Help Button
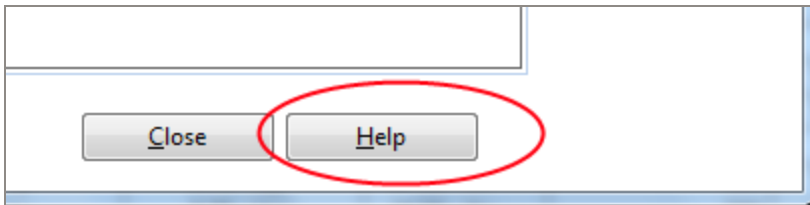
To use Help to learn how to do tasks

1. ⓘ Click [**Help**] on the toolbar, or select the **Home** tab > **Help** group > **Help** (or select **Help** menu > **Help topics** in classic view).

    The Help Window
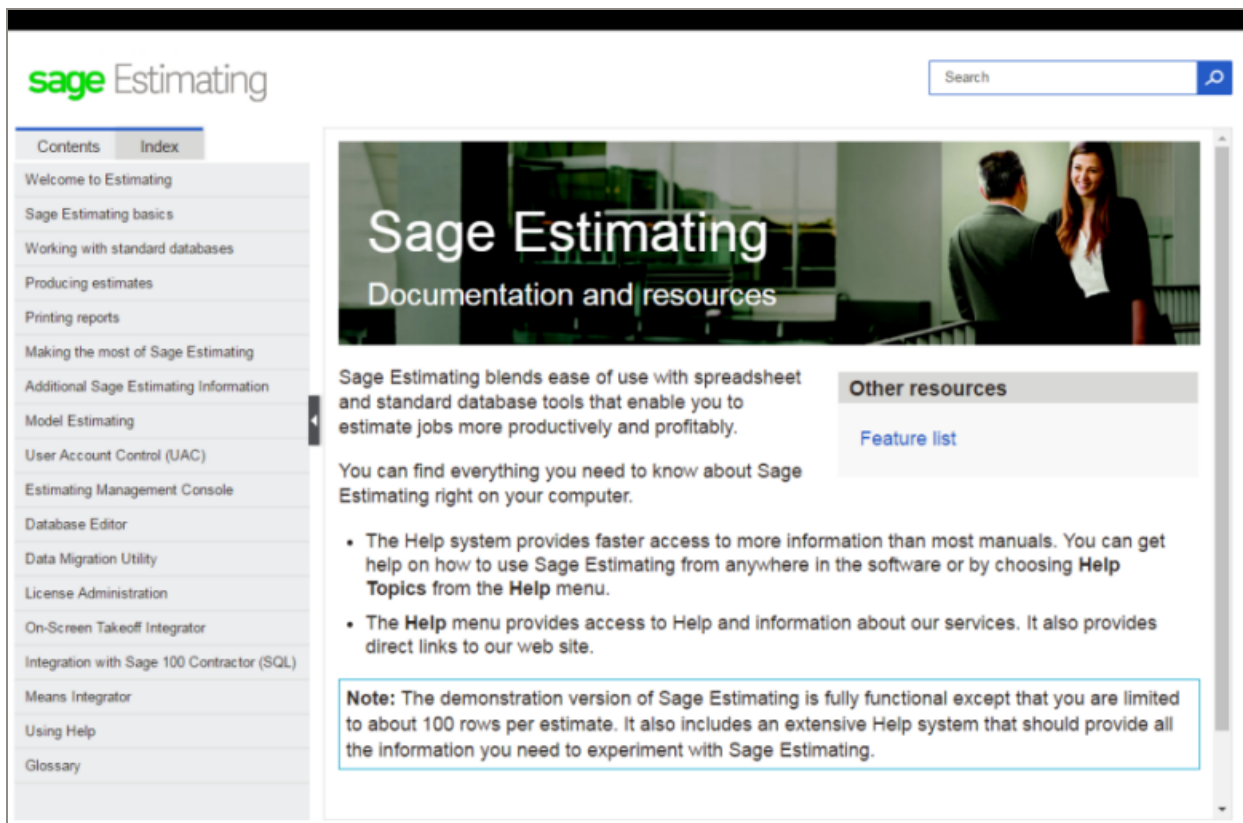
2. Use one of these tabs on the navigation pane to begin looking for a topic.

    a. **Contents** contains Help subjects organized within books.

    b. Click the **Glossary** heading on the Contents tab to view an alphabetical list of definitions of terms used throughout the Sage Estimating software.

    c. **Index** contains an alphabetical list of Help subjects.

    When you see the topic you want, double-click it to display it.

3. Use the **Search** box to find articles that match the keywords you enter.

Additional Self-help Resources

The Help menus available in ribbon view and in classic view provide convenient links to a variety of self-help resources.

The Help menu in Ribbon view
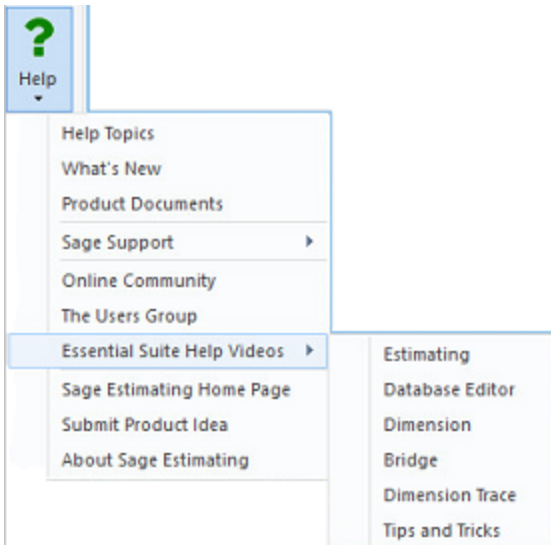
The Help menu in Classic view
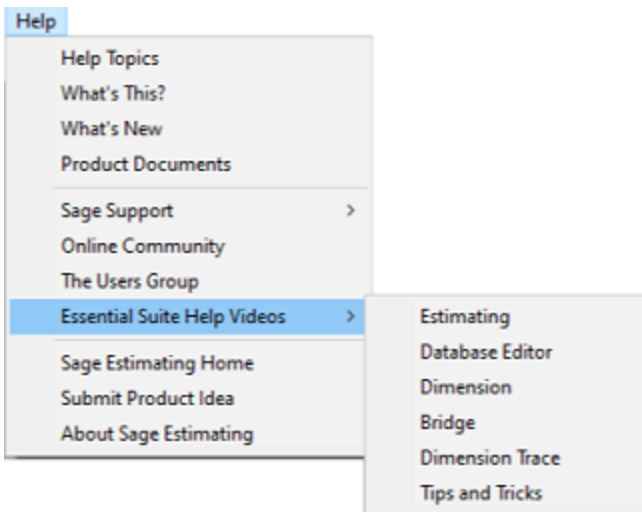
Training

Sage University provides a series of training videos to help you get the most out of your Sage Estimating software. To visit Sage University, go to www.sageu.com.

You can also click **File** > **Help** > **Sage University**.

Submitting Enhancement Requests

We want to hear your suggestions for improving the software. To send us your comments, click the File menu button and then select **Help** > **Submit Product Idea**.

Chapter 1: System Overview

Before you can run Sage Estimating, you need to activate your license, and install and configure the components on which the Estimating system relies.

This chapter provides an overview of the Sage Estimating system, including:

- Installed components
- Tools you use to configure your system after installation
- The Sage online licensing system

Sage Estimating Components
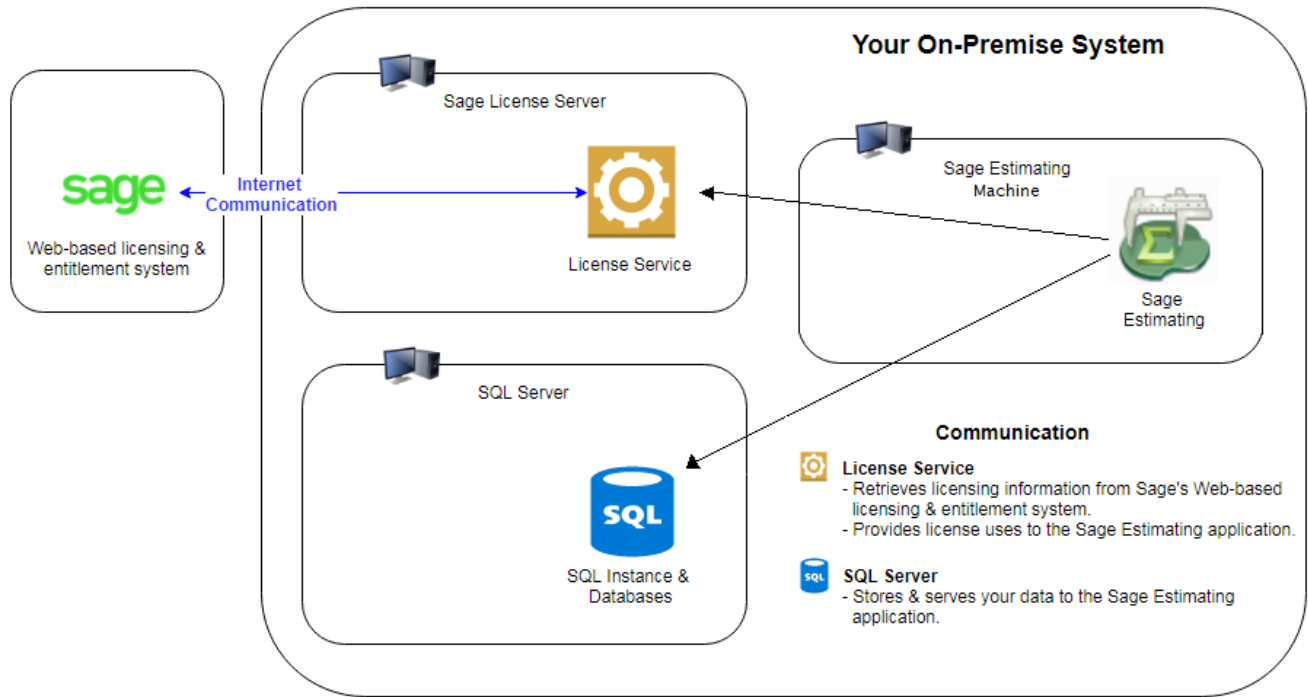
With Sage Estimating Essential, the SQL Server, the Sage License Server, and the Sage Estimating programs all reside on the same machine.

Your On-Premise Sage Components

Your Sage Estimating system includes these components:

- Your purchased Sage Estimating applications
- Your Sage license server
- Your SQL Server instance

You set up all three components on a single machine.

The Sage Estimating application

The Sage Estimating application is the main component of the Sage Estimating suite of programs. It includes the Sage Estimating Configuration Wizard, which you use to connect Sage Estimating to your license server and to your SQL Server instance.

When it is connected to your Sage license server, Sage Estimating:

- Acquires a license use while you have it open.

  Sage Estimating must maintain a connection to your Sage license server.

- Releases the license use when it is closed.

Your License Server

Your Sage license server communicates with the Sage online licensing system. It performs the following tasks:

- It obtains licenses from Sage for your purchased products based on your registered Company name and Sage Client ID, which must exactly match the Company name and Sage Client ID in your account.
- It provides available license uses to your networked Sage Estimating computers.

Because it attempts to connect periodically to Sage, the license server must have continuous Internet access.

Your SQL Server Instance

Your SQL Server instance serves up, stores, and processes Sage Estimating data (including estimates, standard databases, address book, and so on).

The Sage Online Licensing System

Sage Estimating uses a convenient online system to activate and verify your Estimating license.

The Sage online licensing system resides at Sage, and it:

- Maintains a list of your purchased modules and number of license uses.
- Provides information to your Sage license server (at your company) about the modules and license uses to which your company is entitled.

You use the License Administration window to connect to the Sage online licensing system. When you submit your registered Company name and Sage Client ID to Sage, the Sage online licensing system determines the number of license uses and the features that your purchased license provides, and it allocates the licenses to your license server for use in your environment.

Configuration Tools in Sage Estimating

After installation, you use the following configuration tools to set up Sage Estimating:

- **License Administration.** You use the License Administration window to activate and view your product license on your designated Sage license server. For more information, see Activate your license on the Sage license server and "Managing Your License" (page 32).

- **Configuration Wizard.** You use the Configuration Wizard to connect Sage Estimating to the designated Sage license server and SQL Server instance. For more information, see D. Connect Workstations to Your License Server (Configuration Wizard) and D. Connect Workstations to Your License Server (Configuration Wizard) in Chapter 3–Installing and Configuring Sage Estimating.

- **Estimating Management Console.** You use the Estimating Management Console to manage your SQL databases, estimates, custom reports, contacts, and security.
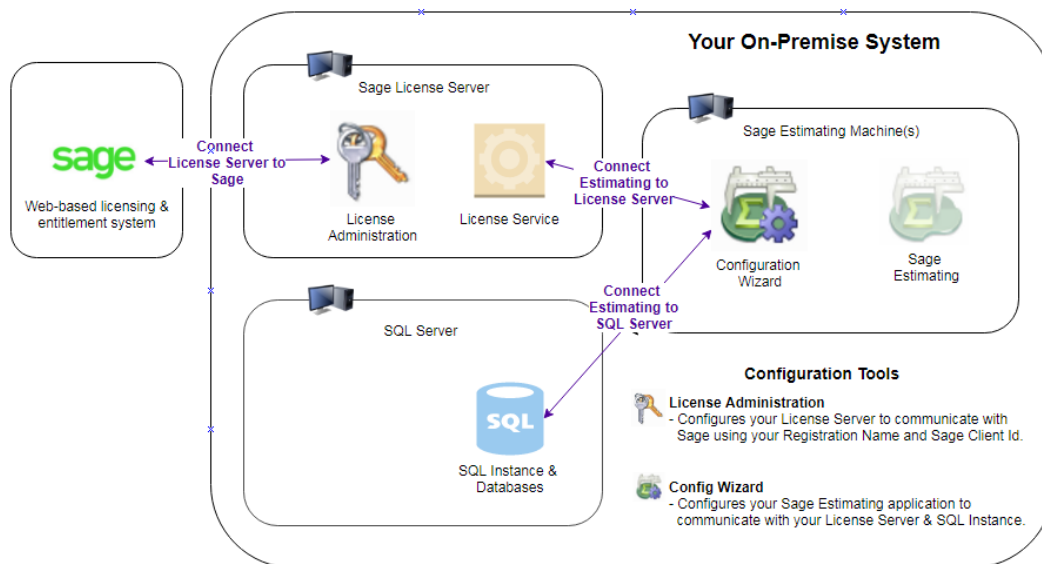
Chapter 2: System and Other Requirements

Before you install Sage Estimating, you should:

- Confirm your registration information:

  1. Log into the Sage Customer Portal at:

     https://customers.sagenorthamerica.com/

  2. Confirm that the Company name used to register your Sage Estimating software exactly matches the Company name used to activate your standard database.

  3. If these names do not match, contact Customer Support before you install and activate Sage Estimating.

- Ensure that your system meets the minimum hardware and software requirements.

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

  For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 101824, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=101824.

- Ensure that you have sufficient Windows permissions to install the software.

  If you are upgrading from an earlier version of Sage Estimating, or you plan to use an existing SQL Server instance, you must also have sufficient permissions on the SQL Server instance.

  For more information, see "Access Rights" (page 10), later in this chapter.

Access Rights

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

Elevate Permissions

During installation, you may be prompted to elevate your privileges. If you do not acknowledge each message within two minutes, the installation process will quit the task. If this occurs, you may receive a separate message asking you to retry the task. To retry the task, click [Retry] and then elevate your privileges when prompted.

SQL Server Permissions

Always use the **Security** feature in the Estimating Management Console to configure security for Sage Estimating.

> **Important!** Do not use SQL Server Management Studio to modify security settings.

For more information on setting up SQL Server security for Sage Estimating, see G. Set Up Estimating Security.

Full Control of Specific Files and Folders Required

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

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

Folders and Files Requiring Operator Control

Product	Operating Systems	Required Folders and Files	Location and Specifications
Sage Estimating	64-bit Windows systems	*[Drive]*:\Program Files (x86)\Sage\ Estimating	This folder is the default installation location for Sage Estimating. However, your company may have renamed this folder or installed it to a different location.
Sage Estimating	Windows 7, Windows 8.1, Windows 10	*[Drive]* :\Users\Public\Sage\ Estimating -and- *[Drive]*	Sage Estimating installs necessary files to these folders and requires that the user has full control of them.

Product	Operating Systems	Required Folders and Files	Location and Specifications
		:\ProgramData\Sage\ Estimating	

> **Note:** Some of these folders may be hidden. To view them:
>
> - **In Windows 7:** Open Windows Explorer, and then click **Organize**> **Folder and Search Options**> **View** tab > **Show hidden files and folders**.
>
> - **In Windows 8.1 and Windows 10:** Open Windows Explorer, click the **View** tab, and then select the **Hidden items** check box in the **Show/hide** group.

Full Control and Read Access to Specific Registry Keys Required

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

- HKEY_CURRENT_USER

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

- HKEY_Local_Machine\Software\ODBC
- HKEY_Local_Machine\Software\Wow6432Node\Sage

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

Chapter 3: Installing and Configuring Sage Estimating

You can set up Sage Estimating on a single computer.

> **Note:** Sage Estimating Essential does not support a networked configuration.

The following sections step you through the installation and configuration of a Sage Estimating Essential system on a standalone workstation.

> **Tip:** For information on the other supported configurations of Sage Estimating, see "Installing and Configuring Sage Estimating " (page 13).

Before You Install or Upgrade Sage Estimating

- Read and understand the information in this guide.

- If you are installing Sage Estimating on a new computer, make sure that .NET 3.5 is enabled.

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

  For current information about supported operating systems, Internet browsers, Microsoft$^{®}$ SQL Server$^{®}$, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 101824, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=101824.

- Make sure that you have full control of the necessary folders, files, and registry keys on your file server, terminal server, and workstations that will have Sage Estimating installed.

  For a list of the required folders, files, and registry keys for your operating system, see the chapter on "System and Other Requirements" (page 10).

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

- You must have the appropriate permissions to perform certain tasks described in this chapter.

Installing on a standalone workstation (overview)

You install Sage Estimating on a single computer that will store your Estimating data and also act as your License Server.

On the workstation where you will run Estimating:

1. Install Sage Estimating (Section A)

2. Install and configure the SQL Server Instance (Section B)

3. Configure your license server (Section C)

4. Connect to the Sage license server (Section D)

5. Connect to SQL Server (Section E)

6. Install standard databases (Section F)

7. Set up roles and permissions as needed (Section G)

A. Install Sage Estimating

If you have not already done so, download the Sage Estimating installation files according to the instructions provided in the software notice.

> **Note:**
> - The installation process may restart your computer during the installation. Ensure you close all programs and applications before starting the installation to avoid losing any data. If your computer restarts, log on to your computer again.
> - If you choose to upgrade data from a previous version of Sage Estimating, the process may take up to four hours, depending on the size of your databases. Plan accordingly.

> **Important!**
> - Do not install Sage Estimating unless you have sufficient hard disk space available.
> - For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 101824, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=101824.

1. Double-click the **SetMeUp.exe** file in your local Sage Estimating **Install** folder.

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

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

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

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

   Selecting this option alone installs the Sage Estimating software and support components.

   SQL Server Express may be adequate if you are installing for demonstration or trial purposes and for small databases. However, for large databases, Sage strongly recommends implementing your Sage Estimating system with a standard version of SQL Server.

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

B. Install and Configure SQL Server

If you are installing Sage Estimating for the first time or if you need to create a SQL Server instance, Sage recommends that you select **the Create a new local SQL Server instance** option when installing Sage Estimating. This option will install a new instance of SQL Server Express with the settings that Sage Estimating requires.

Notes:

- At the instance name prompt, type a name for the new SQL Server instance (database server) in the box, and then click [**OK**].

  The default instance name is **SAGE_ESTIMATING**, but you can give the instance any name you want provided you do not give it the same name as any existing SQL Server instance on the computer.

- SQL Server allows an unlimited database size. However, SQL Server Express limits the database size to 10 gigabytes (GB). Sage Estimating warns you if your database size nears the limit.

  If you select the option to create a new SQL Server instance in the Select installation options for Sage Estimating window, the installation process automatically configures a new Sage Estimating-compatible instance for you.

- The installation process may restart your computer. If your computer restarts, log back onto your

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computer at the prompt.

- You can install an approved instance of SQL Server side by side on a computer where other versions of SQL Server are installed. Be aware that installing Sage Estimating may result in an "Install completed with errors" message. However, the resulting Sage Estimating installation operates correctly.

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 101824, available at
https://support.na.sage.com/selfservice/viewdocument.do?externalId=101824.

C. Configure Your License Server (License Administration)

Before configuring your license server

Make sure you have an active Internet connection.

Activate your license on the Sage license server

To activate your license:

1. On the computer where you installed Sage Estimating Essential, open the **License Administration** window.

   Click **Start > All Apps > Sage Estimating > License Administration**.

2. Ensure that the computer named in the **License server** box is the same machine where Sage Estimating is installed.

   If it is not the same, click **Change server**, and then enter the correct name or IP address of your computer.

3. In the Registration Information section, submit your registration details as follows:

   a. Click the **Edit registration information** link.

   b. In the **Sage client ID** box, type your client number.

   c. In the **Registration name** box, type your registered company name exactly as provided by Sage.

   d. Click [**OK**]

If the activation was successful, the Licensed Modules grid displays the modules that you have purchased.

For more information, see "Managing Your License" (page 32).

D. Connect to the Sage license server(Configuration Wizard)

The Configuration wizard is installed automatically during Sage Estimating installation.

To connect to your Sage license server

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

   - **For Windows 7:** Click **Start** > **All Programs** > **Sage** > **Estimating 19.12** > **Configuration Wizard**.

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

   > **Important!** Depending on your version of Windows, you may need to elevate your permissions before starting the Configuration wizard. On the Start menu, right-click **Configuration Wizard**, and then select **Run as administrator**.

2. In the navigation pane of the Configuration Wizard, click **Licensing**.

3. In the right-hand pane, select the **License Server** option, and then click [**Change**].

4. In the **Specify License Server** window that opens:

   a. In the **Computer** box, type **localhost**.

   b. In the **Port number** box, ensure that the port is set to **48650**.

   c. Click [**OK**].

   > **Note:** A green check mark appears beside the Licensing item in the navigation pane if you configured the license server successfully.

For more information, see "Managing Your License" (page 32).

E. Connect to SQL Server (Configuration Wizard)

As a final step in configuring the workstation, connect to the SQL Server instance ("server"), as follows:

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

   - **For Windows 7:** Click **Start** > **All Programs** > **Sage** > **Estimating 19.12** > **Configuration Wizard**.

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

2. In the navigation pane of the Configuration wizard, click **Data Server**.

3. Beside the **Server** box, click [**Select**] (or click [**Change**] to select a different instance).

   The Select a SQL Server window appears.

4. In the **Server** box, type **localhost**.

   > **Tip:** If you are not sure of the name, click [**Search**], and then select the server from the list.

5. Click [**Verify**].

   A green check mark beside the Data Server item(in the navigation pane indicates a successful connection to your SQL Server Instance.

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

For more information, see "Configuring SQL Server" (page 23).

F. Install Standard Databases

Estimating enables you to keep one or more standard databases that store all the standard cost items you use to prepare estimates–including labor, material, and equipment items and prices, takeoff formulas, and more.

You can build a standard database from scratch or purchase an industry-standard one and customize it to suit your needs.

If you have been maintaining your own items list that you want to continue to use, you can install a "shell" database that comes with Sage Estimating so that you do not have to set up your own database from scratch. These databases contain CSI industry phases codes, but no items. After installing a shell database, you enter an item list manually, or you can import items from an Excel spreadsheet.

Install standard databases

If you have purchased standard databases, you can install and activate them when you finish setting up Sage Estimating (SQL). You install Standard databases using the Estimating Management Console.

1. In the Estimating Management Console, click the **Standard DB** tab.

2. On the toolbar, click **Install Databases**.

3. From the dropdown list, select **Optional Databases**, and then double-click each standard database you want to install from the Available Databases pane.

   Alternatively, if you want to install one of the shell databases (with no items, only phases), select **Shell Databases** from the dropdown list.

4. In the **Databases to install** box, type the activation code for each standard database. (The activation code must match your registration name exactly.)

   > **Note:** Shell databases that come with Sage Estimating do not have activation codes.

5. Click [**Install**].

G. Set Up Estimating Security

There are two aspects to security in Sage Estimating: feature security and estimate security.

As a Sage Estimating administrator, you manage security by maintaining users, roles, and permissions on the Security tab of the Estimating Management Console.

> **Note:** At least one operator must be assigned to the administrator role at all times. Typically, the person who Installs SQL Server is the first Sage Estimating administrator. That person can then assign roles and permissions to others.
>
> - If you install SQL Server as part of the Sage Estimating installation, you are automatically assigned the administrator role.
>
> - If you install SQL Server outside the Sage Estimating installation process, you should assign yourself or another user to the **sysadmin** role for the instance.

About feature security

> **Important!** Only a Sage Estimating administrator can set up and manage roles and permissions.

In the Security window, you use the Users tab to add Estimating users and the Roles tab to assign predefined roles to those users. Each role is associated with certain types of permissions. By assigning different roles to users, you control who can:

- Change estimate security
- Create estimates

- Edit a shared catalog

- Edit a standard database

- Manage custom reports

- Manage shared layouts

- Run the Management Console

- View databases and allow takeoff

About estimate security

Important! Only administrators and users who have **Change estimate security** permission can modify estimate security.

By default, all users can view and edit your estimates. If you want to restrict access to estimates, you must turn off the **Allow all users to view and edit all estimates** option on the Estimates tab in the Security window.

You grant View and Edit access individually for each estimate and for each user.

Setting up roles and permissions

Setting up roles and permissions involves the following general steps:

1. Adding roles and assigning features.

2. Adding users and assigning roles.

To add roles and assign features:

1. Start the Estimating Management Console.

   - **For Windows 7:** Click **Start** > **Programs** > **Sage Estimating 19.12** > **Estimating Management Console**.

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

2. In the Estimating Management Console, click [**Security**].

3. In the Security window, click the **Roles** tab.

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

5. In the Add Role window:

   a. In the **Name** and **Description** boxes, type a name and description for the new role.

   b. In the **Select Features for Role** box, select feature permissions that comes with this role.

6. Click [**OK**].

To add users and assign roles:

1. Start the Estimating Management Console.

   - **For Windows 7:** Click **Start** > **Programs** > **Sage Estimating 19.12** > **Estimating Management Console**.

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

2. In the Estimating Management Console, click [**Security**].

3. In the Security window, click the **Users** tab.

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

5. In the **Add User** window:

   a. In the **User Id** box, select the user you want to add from the list, or search the network for the user.

   b. In the **Role** box, select the role that you want to assign to this user.

6. Click [**OK**].

> **Note:**
>
> - If you know the user Id you're trying to add, key it into the User Id field and select the role you'd like to assign to that user.
>
> - If you don't know the User Id, you can click [Search] to retrieve a list of domain users (and groups) to choose from.
>
> - Depending on your domain user count, the search method could take some time.
>
> - Selecting a User Id will add that user. Selecting a Group Id will add all users contained in that group.

Managing Security

You can manage the user / role relationship using either the User tab or the Role tab. Changes you make on one tab are reflected on the other tab .

You can manage estimate security permissions from the Estimates tab, as well as the Estimate Info window if you have **Change estimate security** permission.

H. After You Complete Your Setup

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

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

Supporting documentation for Sage Estimating is available at http://cdn.na.sage.com/Docs/en/customer/estimating/DocumentationEss.htm, or by clicking **Help > Product Documents** on the ribbon in Sage Estimating. These documents are in Adobe Acrobat (PDF) format. If you do not already have Adobe Acrobat or Acrobat Reader, you can download Adobe Acrobat from www.adobe.com.

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

Chapter 3: Configuring SQL Server

Follow the instructions in this section to install and configure a SQL Server instance manually for use with Sage Estimating.

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 101824, available at
https://support.na.sage.com/selfservice/viewdocument.do?externalId=101824.

Setting Up a SQL Server Instance for Use with Sage Estimating

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

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

> **Caution!** Do not change the owner of any databases in the Sage Estimating instance.

Configure your new SQL Server instance using the settings outlined in the following sections.
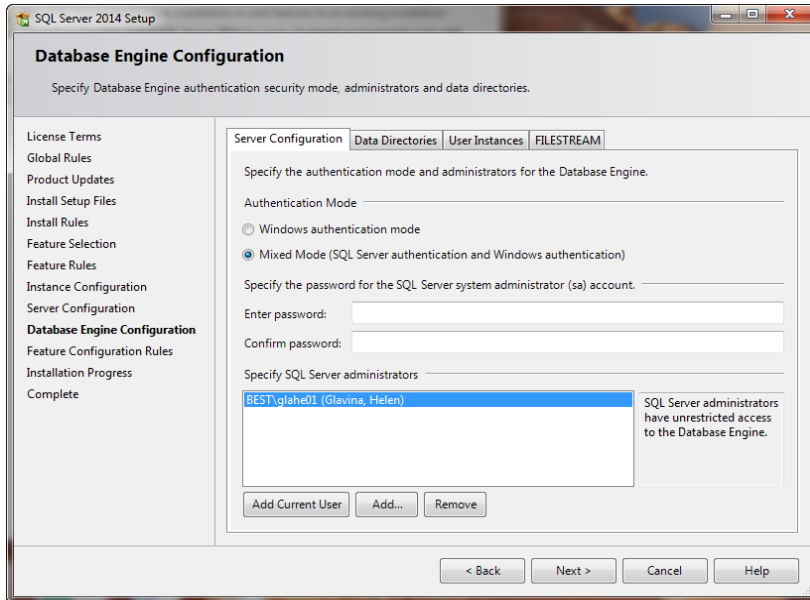
Named Instance

Instance Configuration Settings
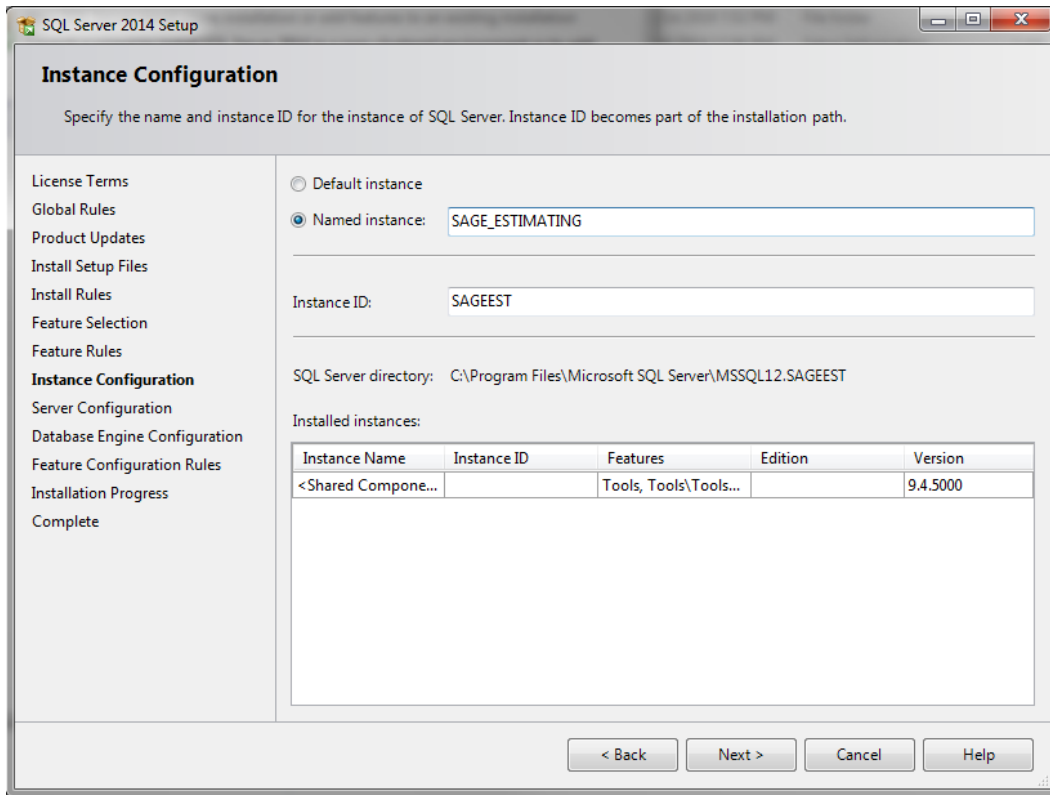
You must use a named instance. You can give the instance any name you want. However, if you have installed a previous version of Sage Estimating (such as version 11.2), give the new instance a different name that is easily recognizable (such as SAGE_EST_19_11).

Authentication Mode

Authentication Mode Settings

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

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

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

Collation Settings

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

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

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

   - **Latin1_General** (for the collation designator)
   - **Case-sensitive**
   - **Accent-sensitive**

2. Clear all other options.

Setting Up Security

You use the **Security** feature in the Estimating Management Console to set up user access to your estimates and standard databases.

For more information on setting up SQL Server security for Sage Estimating, see G. Set Up Estimating Security.

Setting Firewall Exceptions

If you experience communication issues with a remote SQL Server instance, you may be using a firewall that is set up to block network traffic between your computer and the SQL Server instance. To allow communication, you need to set two firewall exceptions:

- The SQL Server Database Engine service. (You need to set a SQL Server Database Engine exception for each instance of SQL Server you use with Sage Estimating.)
- The SQL Server browser service

> **Notes:**
> - The following instructions apply to Windows Firewall. If you are using another firewall for your system, contact the firewall manufacturer for instructions on setting service exceptions.
> - If you are using SQL Server on a workgroup server, you must set separate firewall exceptions to allow your workstations to communicate with the SQL Server instance. Refer to Setting the Firewall for Workgroups instructions.
> - Sage recommends contacting your system administrator if you need to change firewall settings.

Setting the SQL Server Database Engine exception

1. Determine the path to your SQL Server computer.

2. On the computer or server where SQL Server is installed, open the SQL Server Configuration Manager.

3. Start the SQL Server Configuration Manager.

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

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

   The SQL Server Configuration Manager opens.

4. In the left-hand pane of the SQL Server Configuration Manager, select **SQL Server Services**.

5. In the right-hand pane, right-click on **SQL Server (INSTANCE)**, where **(INSTANCE)** is the SQL Server instance for which you are creating the firewall exception, and select **Properties**.

6. In the **SQL Server Properties** window, click the **Service** tab.

7. In the **Binary Path** entry, note or record the path described within the quotation marks. This is the file path to the SQL Server instance binary files (the path is contained only within the quotation marks— ignore the text outside the quotes).

8. Open Windows Firewall.

   If you are using Windows 7, select **Start** > **Control Panel** > **System and Security** > **Administrative Tools** > **Windows Firewall with Advanced Settings**.

   If you are using Windows 8.1 or Windows 10, select **Start > All apps > Windows System > Control Panel > System and Security > Administrative Tools > Windows Firewall > Advanced Settings**.

   a. In the left-hand pane of the **Windows Firewall with Advanced Security** window, right-click **Inbound Rules**, and then select **New Rule**.

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

   c. Select the **This program path** option.

   d. Click [**Browse**] and locate the **sqlservr.exe** file at the binary file path you recorded in step 1, and then click [**Open**].

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

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

   g. Type the name of your SQL Server instance in the **Name** box.

   h. Click [**Finish**] to create the firewall exception for the SQL Server Database Engine service.

      The **Windows Firewall with Advanced Security** window opens.

Setting the SQL Server browser service exception

1. Open Windows Firewall.

   If you are using Windows 7, select **Start** > **Control Panel** > **System and Security** > **Administrative Tools** > **Windows Firewall with Advanced Settings**.

   If you are using Windows 8.1 or Windows 10, select **Start > All apps > Windows System > Control Panel > System and Security > Administrative Tools > Windows Firewall > Advanced Settings**.

2. In the left-hand pane of the **Windows Firewall with Advanced Security** window, right-click **Inbound Rules**, and then select **New Rule**.

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

4. Select **UDP** as the protocol type.

5. Select the **Specific local ports** option, and then type 1434 in the corresponding box.

6. Click [**Next**].

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

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

9. Type `SQL Server Browser Exception` in the **Name** box.

10. Click [**Finish**] to create the firewall exception for the SQL Server browser service.

Setting the Firewall for Workgroups

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

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

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

1. Open Windows Firewall.

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

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

2. Set rules for inbound and outbound TCP connections:

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

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

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

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

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

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

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

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

3. Set rules for inbound and outbound UDP connections:

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

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

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

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

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

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

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

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

Additional Recommendations

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

Memory

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

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

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

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

Recovery Model

Sage recommends that you use the Simple recovery model for your Estimating database.

During the upgrade process, the program now shrinks the existing log file, which can become very large, and it removes invalid estimates. However, it does so only if the database recovery model is set to Simple in the SQL Server software. We do not recommend that you change the recovery model unless your business requires features available only in a different model.

Communication Protocol

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

1. Start the SQL Server Configuration Manager.

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

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

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

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

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

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

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

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

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

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

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

Copying Databases from Other Instances

Sage Estimating allows the use of just one active SQL Server instance at a time. This instance is a "closed" SQL Server instance. Sage Estimating does not recognize databases (Address Book or standard

databases) transferred or copied from other SQL Server instances unless they are added by way of the **Search For** feature in the Estimating Management Console.

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

Copying Databases From One SQL Server Instance to Another
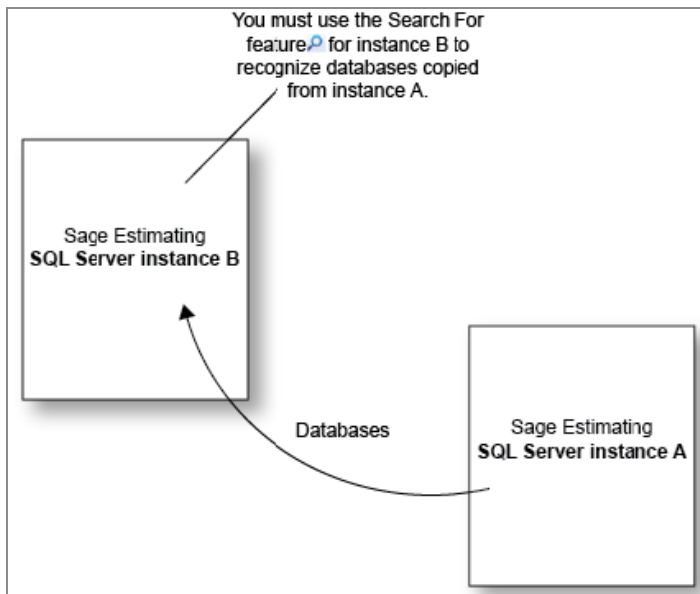
Any database you add to an instance must have the same Sage Estimating version as the other operating databases. For example, if you are using Sage Estimating 19.12, and you want to add a standard database from a previous Sage Estimating installation, upgrade the standard database to version 19.12 before adding it to the new instance. Refer to the Estimating Management Console in-product Help for instructions on using the **Search For** feature.

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

Chapter 4: Managing Your License

This chapter provides detailed information about the Sage online licensing system.

About the License Server and the Sage Online Licensing System

You must have a license to use Sage Estimating.

When you activate your product license on the license server, your Sage products and features are registered on and managed from that computer. As you purchase or remove licenses, the Sage online licensing system updates this information on your License Server.

The license server communicates with Sage daily, keeping your licenses up to date automatically.

You can view your licenses and (if necessary) update registration information manually using the License Administration window. The License Administration window displays your Sage Estimating Essential license, and it lists any additional modules and features you have purchased.

Estimating Modules

Used as a standalone application, Sage Estimating Essential is a powerful, flexible tool for estimating all types of construction projects.

You can also purchase the eTakeoff add-on module to extend the functionality of Sage Estimating to suit the needs of your business. This module is licensed separately from the Sage Estimating Essential product.

> **Note:** Certain capabilities, menus, and icons described in help are available only with the CORE Sage Estimating product. Contact your Sage sales representative for more information about modules and feature bundles.

General Licensing Steps

After installing Sage Estimating Essential, you need to:

1. Configure your License Server using the **License Administration** window.

    - Designate the computer where you installed Sage Estimating (SQL) as the Sage license server.

    - Enter and send registration information to Sage to activate the licenses for the products and features you have purchased.

2. Connect Sage Estimating Essential to the Sage license server using the **Configuration Wizard**.

The following sections describe these steps in more detail.

Designating a Sage License Server

One of your first tasks when setting up your Sage Estimating system is to designate as your Sage license server the computer where you installed Sage Estimating Essential. You must supply the full name of the computer or its IP address.)

> **Note:** The Sage license server must remain connected to the Internet for daily validation of your license.

To determine the computer name of the server:

1. Open the Windows **Control Panel**.

    - In Windows 7, click **Start** > **Control Panel**.

    - In Windows 8 and Windows 10, on the Start menu, click **All Apps** > **Windows System** > **Control Panel**.

2. From the Control Panel, click **System and Security** > **System** to display the **System Properties** window.

3. Under **Computer name, domain, and workgroup settings**, locate **Full computer name**, and then make a note of the name.

4. Close the Control Panel.

To designate the Sage license server:

> **Important!** A license use is allocated to the designated computer when you submit your registration and activate your license. If you need to move your Sage Estimating Essential installation to a different computer, later, you must first deauthorize the license on the **License Information** tab on the old computer before you can activate the license on a new server.

1. On the computer where you plan to activate your license, start **License Administration**.

2. Click **Change server**.

3. In the **Specify License Server** window:

   a. In the **Computer** box, type **localhost**.

   b. In the **Port number** box, type **48650** if that is not the port number displayed in the box.

4. Click [**OK**].

Registering the Software and Activating Licenses

To activate your license:

1. On the computer where you installed Sage Estimating Essential, open the **License Administration** window.

   Click **Start > All Apps > Sage Estimating > License Administration**.

2. Ensure that the computer named in the **License server** box is the same machine where Sage Estimating is installed.

   If it is not the same, click **Change server**, and then enter the correct name or IP address of your computer.

3. In the Registration Information section, submit your registration details as follows:

   a. Click the **Edit registration information** link.

   b. In the **Sage client ID** box, type your client number.

   c. In the **Registration name** box, type your registered company name exactly as provided by Sage.

   d. Click [**OK**]

      If the activation was successful, the Licensed Modules grid displays the modules that you have purchased.

Connecting to the License Server from Sage Estimating

Before you can use Sage Estimating, you must connect Sage Estimating to the Sage license server. Then, when you start Sage Estimating, the program automatically acquires a license use for the workstation.

To connect to the license server:

1. On your workstation, open the **Specify License Server** window:

    a. Start the **Estimating Configuration Wizard**.

    b. In the navigation pane, click **Licensing**.

    c. In the right-hand panel, select the **License Server** option.

    d. Click [**Change**].

2. In the **Specify License Server** window:

    a. In the **Server** box, type **localhost**.

    b. In the **Port** box, type **48650** if that is not the port number displayed in the box.

3. Click [**OK**].

Updating License Information

The Sage license server automatically retrieves license information from Sage every day. The license gives you access to Sage Estimating Essential.

You can also update the licensing information manually, as follows:

1. Open **License Administration**.

2. Ensure that License Administration tool is pointing to your designated License Server machine.

3. On the License information tab, click the **Update license information** link.

    Your Sage license server then contacts the Sage online licensing system to update your license information, as needed.

Deauthorizing a License Server

When you set up your Sage license server, the Sage online licensing system allocates a license use for your purchased Sage Estimating Essential modules to that computer.

At some point in the future, you might need to designate a different computer as the license server (for example, if you want to upgrade to a new computer) or change your registered company name. However, you cannot allocate your license to a new computer or a new company while it is allocated to the original server.

Before you can reallocate your license to a different license server, you must release the allocated licenses to the Sage online licensing system. You do so by deauthorizing the original license server, enabling you to configure the new license server and register the license to that machine.

> **Caution!** Do not deauthorize your license server if you have a license use checked out. Doing so can lock your license, requiring Sage Customer Support to resolve.

To deauthorize your Sage license server:

1. Check your current license server information:

    a. Start **License Administration**.

    b. Ensure that the **License server** box contains the name of the computer you want to deauthorize.

2. Deauthorize your current license server:

    a. Ensure that no other users are working with Sage Estimating.

    b. Click **Deauthorize license server.**

    You should receive a message saying that deauthorization was successful.

Changing Your Company's Registration Information

> **Caution!** Do not change registration information if you have checked out a license use. Doing so can lock the licenses, requiring Sage Customer Support to resolve.

To change your registration information:

1. Deauthorize your current license server.

    > **Important!** This step is crucial. You must release your allocated license to the Sage online licensing system so it is available to reallocate to the "new" company. Make sure you receive a message saying that deauthorization was successful before you proceed.

2. Change your company's registration name:

    a. Click **Edit registration information**.

    b. Enter your new registration information in the Sage client ID and Registration name boxes.

    c. Click [**OK**].

If the new registration is successful, the Licensed Modules grid displays your licensed modules and license uses with your new registration information.

> **Note:** If you are using licensed standard databases, you need to obtain new activation codes for these databases after changing your registration information.

Moving Your Sage License Server to Another Computer

> **Caution!** Do not try to change your license server if you have checked out a license use. Doing so can lock the license, requiring Sage Customer Support to resolve.

To move your license server to another computer.

1. Verify the full computer name of the computer you want to use as the new license server.

2. Deauthorize your current license server.

   > **Important!** This step is crucial. You must release your allocated license to the Sage online licensing system so that it is available to reallocate to the server. Make sure you receive a message saying that deauthorization was successful before you proceed.

3. Click **Change server**, and then, in the **Specify License Server** window:

   a. In the **Computer** box, type the full name of the computer you want to use as the license server.

   b. Click [**OK**].

   > **Important!** Entering a new computer name in the Specify License Server window points the License Administration window to a different machine, enabling you to administer licenses on that license server.

4. To update your registration information, click **Edit registration information**, type your Sage client ID and registration name in the boxes provided, and then click [**OK**].

   If the new server is authorized successfully, the Licensed Modules grid displays your licensed modules and license uses with your new registration information.

Troubleshooting License Server Issues

This section provides suggestions to resolve some of the common issues that can occur with your Sage Sage Estimating (SQL) licenses.

The Registration Information Does Not Match

The **Sage client ID** and **Registration Name** on the License Administration window must match the information on the Sage license server. Ensure the information is entered correctly here.

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 the message **A network cable is unplugged**.

   - If you see this message, reconnect the network cable to the workstation.

   - If you do not see this message, check the network connections:

     a. Click [**Start > Control Panel > Network Connections**.

     b. In the LAN or High-Speed Internet section, check the Status of the Local Area Connection.

        - If the Status is **Network cable unplugged**, reconnect the network cable to the workstation.

        - If the Status is **Connected**, the network cable is connected to the workstation.

2. Try to use the License Administration tool.

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