Sage Timberline Office

Technical System Reference

Accounting and Management Products 9.7 CD

Estimating Products 9.7 CD

sage

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Contents
Technical System Reference

Section 5
Install, Move, and Remove Sage Timberline Office

Section 6
Further Assistance

Section 1

System Guidance

General

For information about system requirements, prerequisites, and details about installing Sage Timberline Office, see the *Installation Guide*. You can find the *Installation Guide* along with other up-to-the-minute support documentation on our knowledgebase. See "Sage Customer Knowledgebase" on page 23 for more details.

Develop a Plan to Back Up Files

We strongly recommend that you use third-party software to back up all Sage Timberline Office data files to external media on a daily basis.

NOTE: For information about backing up Document Management, see the Technical System Reference for Document Management 9.7 CD. It is located on the Document Management CD under **Documents / DM_Technical_System_Reference.pdf**.

Consider the following as you develop your backup plan:

- Use third-party backup software for all backups.

- Verify that when a folder is included in a backup, the backup software also includes the subfolders. The backup software should support recursive backups.

- Schedule the backup during off-peak hours, since all users must close Sage Timberline Office before you back up files.

- Always back up your entire Sage Timberline Office dataset. Do not perform incremental backups.

- Review the backup to be sure all data has been included. Back up all data and files, even if they are outside the default folders. For most Accounting and Management products, you can see a list of folders that are outside the current data folder.

  In **TS-Main**, select **File > Company Settings > File Locations** and review entries in the **Data Folder** column.
  In the Sage Timberline Office Desktop **Tasks** pane, click **Timberline Office > Common Tasks > File > Company Settings > File Locations**.

- Back up all data and application files within the Sage folder:

  - **In XP** and **Windows 2003**–*[Drive:]*\Documents and Settings\All Users\Application Data\Sage

  - **In Vista, Windows 2008, and Windows 7**–*[Drive:]*\Program Data\Sage

- Store backup media in a secure location outside your building.

- Test backups by restoring them to test folders. These tests are important because backup media may have a limited life, backup devices may malfunction, and you may have incorrect software settings in your backup software.

WARNING: When you test a backup, keep the restored data separate from your production data.

Follow Special File Tools Instructions for Inventory, Purchasing, and Service Management

Follow these instructions when you use File Tools with Inventory, Purchasing, and Service Management.

- To perform File Tools operations on Inventory or Purchasing files, start File Tools from TS-Main, Desktop, or another Accounting and Management product and include the POIV Data folder in the File Tools operation. You cannot start File Tools from Inventory or Purchasing.

- To perform File Tools operations on Service Management files, start File Tools from TS-Main, Desktop, or another accounting and management product and include the SMData folder in the File Tools operation. You cannot start File Tools from Service Management.

NOTE: To use Sage Timberline Office, users must have full control of the Pervasive installation folder and subfolders. For information on using Pervasive, see

Do Not Actively Scan Pervasive Program Files, Sage Timberline Office Program Files, or Sage Timberline Office Data Files for Viruses

IMPORTANT: Scan these files at a time when they are not in use (for example, schedule a daily scan overnight).

If you actively scan Pervasive program files, Sage Timberline Office program files, or Sage Timberline Office data files for viruses, this may cause Sage Timberline Office to run slowly or to close unexpectedly. Typical folders that contain files that you should not scan include:

- Pervasive program files
  In Windows XP and Server 2003:
  C:\Program Files\Pervasive Software
  C:\Documents and Settings\All Users\Application Data\Pervasive Software

  In Server 2008, Vista, and Windows 7
  C:\Program Data\Pervasive Software

- Sage Timberline Office program files: (for example, *[Drive]*:\Program Files\Timberline Office)

- Sage Timberline Office data files: (for example, *[Drive]*:\TSData)

Windows User Account Control (UAC)

Sage Timberline Office is designed to work with the Windows User Account Control (UAC) security scheme. With Windows Vista, Windows 7, and Windows Server 2008, you cannot save a file to a folder to which you do not have read/write permissions assigned. If such an attempt is made, Windows security diverts your data to a copy of the data file or report and associates the copy with your user profile, thereby possibly compromising the integrity of your application. To prevent this, Sage Timberline Office applications present you with an error message if you try to save a file to such a location. See page 9 for more information about UAC.

Accounting and Management Products

- New installations of Sage Timberline Office on Windows Vista, Windows 7, or Windows Server 2008 operating systems will place data files in the *[Drive]:***ProgramData\Sage\Timberline Office** folder.

- New installations on Windows XP or Windows Server 2003 will place data files in the *[Drive]:***Documents and Settings\All Users\Application Data\Sage\Timberline Office** folder.

□ Upgrades to existing installations on Windows XP or Windows Server 2003 will not move existing data folders. You do not need to move your data folders in this scenario.

□ Upgrades to existing installations on Windows Vista, Windows 7, or Windows Server 2008 require you to share the data folders and assign read/write permissions or move the folders to a shared location and assign read/write permission to the shared location.

NOTE: You can share the data files before installing the upgrade. You can move data folders after completing the upgrade installation. If you move your data files and you use **File Locations** (**File > Company Settings > File Locations**) to allow other data folders to access the folder's data files, be sure you update the locations using **File Locations** for each affected data folder.

If you install in a client/server environment, note that the WinInst folder and corresponding Install.exe file was moved in 9.5. The path to the WinInst folder is:

- **Windows XP and Windows 2003**–*[Drive]:*\Documents and Settings\All Users\Application Data\Sage\Timberline Office\9.5\Accounting\WinInst\Install.exe.

  Windows Vista, Windows 7, and Windows 2008– *[Drive]:*\ProgramData\Sage\Timberline Office\9.5\Accounting\WinInst\Install.exe.

Estimating Products

If you are upgrading Sage Timberline Office Estimating, all of the Sage Timberline Office Estimating data files and reports previously residing in the Program Files folder will be copied automatically to a shared location.

In Windows Vista, Windows 7, and Windows Server 2008, these files will be copied to the *[Drive]:***Users\Public\Estimating** folder.

In Windows XP and Windows Server 2003, these files will be copied to *[Drive]:***Documents and Settings\All Users\Estimating**.

After installation, verify your application operates correctly and you have access to your data then remove the original data files from the Program Files folder.

NOTE: Some folders may be hidden. To view them in:
Windows XP Professional and Windows Server 2003, open Windows Explorer, select **Tools > Folder Options**, and select the **View hidden files and folders** check box on the **View** tab.

Windows Vista, Windows 7, and Windows Server 2008, open WIndows Explorer, select **Organize > Folder and Search Options**, and then select **Show hidden files and folders** on the **View** tab.)

Do Not Use NTFS File Compression on Data or Program Files for Sage Timberline Office

Using Microsoft Windows NTFS file system to compress files causes Sage Timberline Office to run very slowly.

Terminal Services

Configure Terminal Services to Maintain an Operator's Session During Connection Breaks

Configuring Terminal Services to maintain an operator's session during connection breaks prevents a program from closing unexpectedly and helps preserve data integrity. To set up this aspect of Windows Terminal Services, use the Terminal Services Configuration program.

For more information about using Terminal Services, see "Terminal Services" on page 13.

Do Not Use Fast User Switching (Windows XP Professional and Vista)

Sage Timberline Office does not support fast user switching on Windows XP Professional, Windows Vista and Windows 7.

Pervasive Database Engines

The Pervasive database engines provide access to Sage Timberline Office data files. To use Sage Timberline Office, users must have full control of the Pervasive installation folder and subfolders.

Do Not Use the Subst or Netdrv Commands in Windows

The Subst and Netdrv commands may cause Pervasive status code 11 or 116 errors.

Do Not Exclusively Use the NetBEUI Network Protocol

We do not support the NetBEUI network protocol. If NetBEUI is your only network protocol, you must install TCP/IP before you install Sage Timberline Office. If no applications require the NetBEUI protocol, consult with a network technician about removing it.

Firewalls

Sage Service Host

Beginning with Sage Timberline Office version 9.5, the Sage Service Host uses TCP instead of named pipes for inter-machine communication. Sage Service Host is a Windows service that runs on Sage Timberline Office servers and workstations. This service facilitates communication between Sage Timberline Office applications.

If you use Windows Firewall, you do not need to take any action, as Windows Firewall is configured during installation to work correctly with Sage Timberline Office. However, if you use a non-Windows firewall, you may need to manually adjust some settings in order to ensure proper performance.

Setting Up Sage Service Host on Firewalls Other Than Windows Firewall

If you use a firewall other than Windows Firewall, you may be prompted during installation that the Sage Service Host is attempting to access the internet or is attempting to act as a server. The Sage Service Host must be given permission to perform these types of activities.

If you need to manually set up this exception, make the following changes on every machine where Sage Timberline Office is installed:

- Set up your firewall to allow an exception for the Sage Service Host. Refer to the Windows Firewall instructions below and your firewall documentation for specific instructions.

- If you have other software that uses TCP ports 8101 and 8102, you may need to manually configure either the other software or the Sage Service Host to use different port numbers.

  The Sage Service Host port numbers can be configured in the **Sage.STO.9.5.xml** file. This file is located in **Documents and Settings\All Users\Application Data\Sage\LS1\ServiceHost\1.0\Configuration**. If you need to change the default port numbers for Sage Service Host, this file should be changed on every machine on the network where Sage Timberline Office is being installed, including the accounting server.

Setting Up Sage Service Host on a Windows Firewall

Windows Firewall is automatically configured during installation to work correctly with Sage Service Host. However, if you need to manually set up Sage Service Host to communicate on a Windows Firewall, do the following:

- Open Windows Firewall and select the **Exceptions** tab. If Sage Service Host is not on the list, you can add it by selecting [**Add Program**], and then browsing to the following path: *[Drive]:***\Program Files\Common Files\Sage\LS1\ServiceHost\1.0\ Sage.LS1.ServiceHost.exe**.

- By default, the exception is set for any computer on the network. You can adjust this setting by selecting [**Change Scope**].

- If you have other software that uses TCP ports 8101 and 8102, you may need to manually configure either the other software or the Sage Service Host to use different port numbers.

  The Sage Service Host port numbers can be configured in the **Sage.STO.9.5.xml** file. This file is located in **Documents and Settings\All Users\Application Data\Sage\LS1\ServiceHost\1.0\Configuration**. If you need to change the default port numbers for Sage Service Host, this file should be changed on every machine on the network where Sage Timberline Office is being installed, including the accounting server.

Section 2
Frequently Asked Questions

If Sage Timberline Office stops responding during the workstation installation, how can I resolve this?

Try the following:

- Turn off antivirus software and unnecessary programs before you install.

- Verify that you have full user rights to the parent folder of the application data folders containing files needed so that Timberline Office can run correctly.

  For Accounting and Management applications, the default location is:

  - **Windows XP and Windows Server 2003**–*[Drive]*:\Documents and Settings\All Users\Application Data\Sage

  - **Windows Vista, Windows 7, and Windows Server 2008–** *[Drive]*:\ProgramData\Sage

  For Estimating applications, the default location is:

  - **Windows XP and Windows Server 2003**–*[Drive]*:\Documents and Settings\All Users\Estimating.

  - **Windows Vista, Windows 7, and Windows Server 2008–** *[Drive]*:\Users\Public\Estimating.

When I start Estimating or Buyout on my workstation, an Address Book Not Found window appears. The message in this window begins with "Unable to connect to the Address Book database." How do I connect to the Address Book database?

You must perform an additional installation and then configure Estimating and Buyout to access shared Address Book, Job Cost, and tax data.

For instructions about the additional installation, see the "Other Installation Scenarios" in the "Install Estimating Products" section of *Installation Guide*. It is located on your CD under **Documents > GetStarted.pdf**.

For instructions about configuring Estimating and Buyout to access shared Address Book, Job Cost, and tax data, see "Selecting a company data folder for Address Book and Job Cost information" in Estimating Help or "Select a company data folder for Address Book and accounting information" in Buyout Help.

How do I move Accounting and Management Products from one server to another?

WARNING: Incorrectly moving Sage Timberline Office data folders may severely damage your system. Sage Software is not responsible for damage to your data caused by incorrectly moving your Sage Timberline Office data folders. Before making changes to your Sage Timberline Office data, contact your system administrator for assistance and make a backup copy of all valued data.

We recommend that you upgrade your source server with 9.7 before you move to a new server. Verify that the installation is functioning correctly, then use the instructions below to move your program and data folders.

For detailed instructions for moving to a Windows 2003, Windows 2008, or a Vista server, host, or standalone workstation, open https://customers.sagenorthamerica.com/ and log on. Once you have logged on, open the Knowledgebase. In the **Knowledgebase Search** box, type *How do I move Accounting and Management Products to a different drive, host, server, or standalone workstation?*

See for more details on how to access the Knowledgebase.

Versions of Sage Timberline Office prior to 9.5 will not install correctly on a Vista, Windows 2007, or Microsoft Server 2008 operating system.

I upgraded from Sage Timberline Office 9.4. Do I need to move my data folders or reports to comply with User Access Control (UAC) requirements?

For Accounting & Management applications, you do not need to move folders to comply with UAC requirements unless you also install the Windows Vista or Windows Server 2008 operating system.

If you install Vista, Windows Server 2008 or Windows 7, you do not need to move folders if they are already shared. If your data and report folders are not already shared, you will need to share the location or move them to a shared location and then update their location at **File > Open Company > [Specify Folders]**. Refer to "Which Accounting & Management files have been moved for Sage Timberline Office?" below for information on folder locations.

The Sage Timberline Office folder continues to exist under Program Files but contains only the essential binary files required for the applications to operate.

For Estimating applications, your folders will be copied automatically to a shared location during upgrade.

In Windows Vista, these files will be copied to the *[Drive]:\Users\Public\Estimating* folder.

In Windows XP and Windows Server 2003, these files will be copied to *[Drive]:\Documents and Settings\All Users\Estimating*.

In Purchasing (PO) and Inventory (IV), if you originally set up your company (data) folder inside the Program Files folder, your data will not be accessible after you upgrade.

To prevent this issue, you should move your data from the Program Files folder to a different location prior to upgrading, as described in "Windows User Account Control (UAC)" on page 3.

Opening Purchasing or Inventory from a workstation before opening on a server will cause the DSN to be set incorrectly. After Purchasing or Inventory has been opened at the server, the applications can be opened at any workstation.

This issue is not specific to Windows Vista or UAC but the solution to resolve it is the same.

After installation, verify your application operates correctly and you have access to your data, then remove the original data files from the Program Files folder.

Which Accounting & Management files have been moved for Sage Timberline Office?

Many Sage Timberline Office folders have been moved from the Program Files folder to a shared location beginning with the 9.5 CD release. A list of the affected Accounting & Management application folders is provided in the tables below.

NOTE: Some folders may be hidden. To view them in:

Windows XP Professional and **Windows Server 2003**–Open Windows Explorer, select **Tools > Folder Options**, and select the **View hidden files and folders** check box on the **View** tab.

Windows Vista, Windows 7, and **Windows Server 2008**–Open Windows Explorer, select **Organize > Folder and Search Options**, and then select **Show hidden files and folders** on the **View** tab.)

File/Original Location	New Location (Windows XP and Windows 2003,)
[Program Files]\Timberline Office\Accounting\Formula	Documents and Settings\All Users\Application Data\Sage\TimberlineOffice\9.5\Accounting\Formula
[Program Files]\Timberline Office\Accounting\Inquiry	Documents and Settings\All Users\Application Data\Sage\TimberlineOffice\9.5\Accounting\Inquiry
[Program Files]\Timberline Office\Accounting\Report	Documents and Settings\All Users\Application Data\Sage\TimberlineOffice\9.5\Accounting\Report
[Program Files]\Timberline Office\Accounting\Template	Documents and Settings\All Users\Application Data\Sage\TimberlineOffice\9.5\Accounting\Template
[Program Files]\Timberline Office\Accounting\[Sample Data Folders]	Documents and Settings\All Users\Application Data\Sage\TimberlineOffice\Data\[Sample Data Folders]
[Program Files]\Timberline Office\Accounting\WinInst	Documents and Settings\All Users\Application Data\Sage\TimberlineOffice\9.5\Accounting\WinInst
[Program Files]\Timberline Office\Documents	Documents and Settings\All Users\Application Data\Sage\TimberlineOffice\9.5\Documents

File/Original Location	New Location (Windows Vista and Windows Server 2008)
[Program Files]\Timberline Office\Accounting\Formula	ProgramData\Sage\TimberlineOffice\9.5\Accounting\Formula
[Program Files]\Timberline Office\Accounting\Inquiry	ProgramData\Sage\TimberlineOffice\9.5\Accounting\Inquiry
[Program Files]\Timberline Office\Accounting\Report	ProgramData\Sage\TimberlineOffice\9.5\Accounting\Report
[Program Files]\Timberline Office\Accounting\Template	ProgramData\Sage\TimberlineOffice\9.5\Accounting\Template
[Program Files]\Timberline Office\Accounting\[Sample Data Folders]	ProgramData\Sage\TimberlineOffice\Data\[Sample Data Folders]
[Program Files]\Timberline Office\Accounting\Wininst	ProgramData\Sage\TimberlineOffice\9.5\Accounting\Wininst
[Program Files]\Timberline Office\Documents	ProgramData\Sage\TimberlineOffice\9.5\Documents

Why am I getting an error message when I try to save data or reports?

You cannot save data or report files to a location for which you do not have read/write permissions. This is to comply with Windows security requirements. To save the file, you must first have read/write permissions assigned or else save the file to another location to which you already have these permissions.

Section 3
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 Timberline Office products without the use of Terminal Services. Terminal Services provides remote users with a stable and well-performing experience with Sage Timberline Office.

NOTE: You must use License Manager in order to use Estimating with Terminal Services.

Terminal Services Configurations

IMPORTANT: If you use Citrix MetaFrame, you must install it before you install Sage Timberline Office.

You can install Sage Timberline Office applications on your terminal server, or you can use Terminal Services in conjunction with a server for Sage Timberline Office.

NOTE: Sage Software does not support the administrative configuration of Terminal Services with Sage Timberline Office products because it is a partially configured version of Terminal Services.

One Server: Terminal Server Provides Terminal Services and Hosts Sage Timberline Office Data
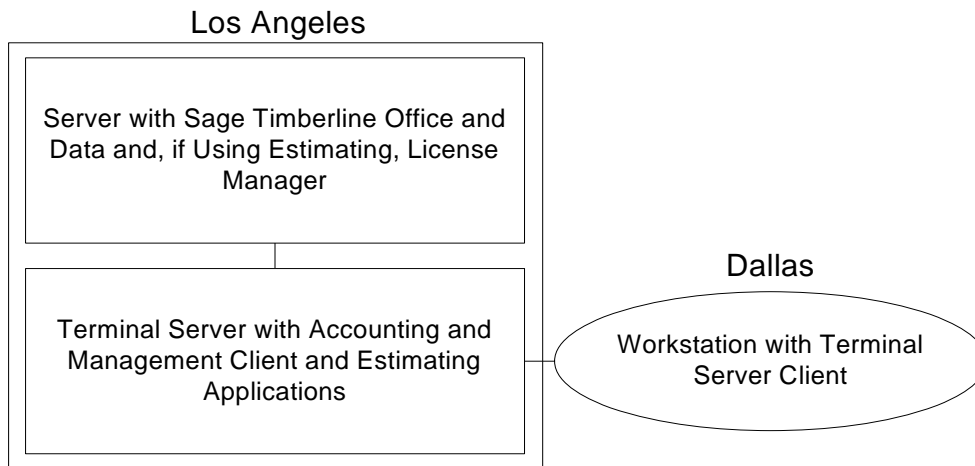
Los Angeles

Dallas

Terminal Server with Sage Timberline Office and Data

Workstation with Terminal Server Client

If Using Estimating: Workstation or Server with License Manager

Note: Windows Terminal Services does not support License Manager on a terminal server.
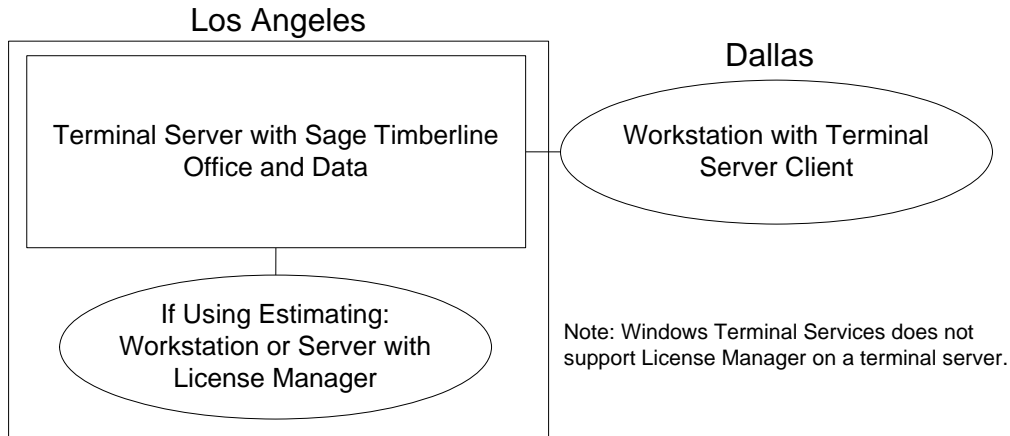
Two Servers: Terminal Server Provides Terminal Services and Different Server Hosts Sage Timberline Office Data

Los Angeles

Server with Sage Timberline Office and Data and, if Using Estimating, License Manager

Dallas

Terminal Server with Accounting and Management Client and Estimating Applications

Workstation with Terminal Server Client

Section 4

Printers

General Guidelines

Sage Timberline Office supports the use of business-class laser printers. We no longer support the use of dot matrix printers for printing 1099s and W-2s.

Sage Timberline Office Products Require a Laser Printer or Dot Matrix Printer

You should use inkjet or bubble jet printers only as backup printers. Sage Timberline Office does not test inkjet or bubble jet printers.

State Quarterly Report Forms Printers

For a state-by-state list of printer requirements, go to Payroll Help and type <u>states with special quarterly form requirements</u> on the **Index** tab.

Some Reports That Use the Crystal Reports Format Require a Laser Printer

You must use a laser printer to generate cost and contract invoices (AIA documents) that use the Crystal Reports® format. Billing, Service Management, Purchasing, and Inventory offer these invoices.

Laser Printers

Recommended Configuration

Printer Driver

We strongly recommend that you use a PCL 5e printer driver.

Most new printers also support a PCL 6 printer driver. A PCL 6 driver supports higher resolutions than a PCL 5e driver (1200 dots per inch versus 600 dots per inch. However, because of its higher resolution (and, thus, greater memory needs), PCL-6-based printing uses more toner, is slower, and is sometimes unstable.

Many printers come with both PCL 5e drivers and PCL 6 drivers. If your printer does not come with a PCL 5e driver, your printer manufacturer probably offers one for free online.

Try using the PCL 5e driver first. Switch to a PCL 6 driver only if your printer does not function properly with a PCL 5e driver.

Margins

The following margins work with most laser printers.

Products	Top (Inches)	Bottom (Inches)	Left (Inches)	Right (Inches)
Accounting and Management Products	0.25	0.5	0.25	0.5
Estimating Products—portrait printouts	0.2	0.2	0.3	0.3
Estimating Products—landscape printouts	0.3	0.3	0.2	0.2

Dot Matrix Printers

Recommended Dot Matrix Printers

We recommend a nine-pin, wide-carriage dot matrix printer. This type of printer effectively handles Sage Timberline Office's wide reports, which use 14 7/8 by 11 inch paper (US standard fanfold).

Recommended Configuration

Printer Class	Recommended Configuration
Narrow carriage (9 pin)	Emulation: Epson FX[1] Driver: Epson FX 286e (Windows CD) Print Quality: Draft[2] Margins (top, bottom, left, right; inches):0.25, 0.5, 0.25, 0.5
Wide carriage (9 pin)	Emulation: Epson FX[1] Driver: Epson FX 286e (Windows CD) Print Quality: Draft[2] Margins (top, bottom, left, right; inches): 0.25, 0.5, 0.25, 0.5 (1.29)[3]
Narrow carriage letter-quality (24 pin)	Emulation: Epson LQ[1] Driver: Epson LQ 2550 (Windows CD) Print Quality: Draft[2] Margins (top, bottom, left, right; inches): 0.25, 0.5, 0.25, 0.5
Wide carriage letter-quality (24 pin)	Emulation: Epson LQ[1] Driver: Epson LQ 2550 (Windows CD) Print Quality: Draft[2] Margins (top, bottom, left, right; inches): 0.25, 0.5, 0.25, 0.5 (1.29)[3]

[1]The emulation is set up on the printer itself. To check your current emulation, install the recommended Epson driver and print a test page with this driver. If the test page prints legibly, the emulation is set to Epson or your printer can automatically acquire the emulation from the driver. If the test page is not legible, physically change the emulation on the printer. Refer to your printer manual for instructions.

[2]Specify print quality under Printing Preferences. You can affect print quality only by changing the print resolution.

[3]If you print on plain, wide carriage paper (14 7/8 x 11 inches), set the right margin to 1.29 inches. If you print on a form, use the margins required by the form.

Tested Dot Matrix Printers

Model	Recommended Configuration
Epson DFX 5000+ (wide carriage 9 pin)	Emulation: Epson FX Driver: Epson FX 286e (available on Windows CD) Margins (top, bottom, left, right; inches): 0.25, 0.5, 0.25, 0.5 (1.29)[1]
Okidata ML 591 (wide carriage 24 pin)	Emulation: Epson LQ Driver: Epson LQ 2550 (available on Windows CD) Margins (top, bottom, left, right; inches): 0.25, 0.5, 0.25, 0.5 (1.29)[1]

[1]If printing on plain, wide carriage paper (14 7/8 x 11 inches), set the right margin to 1.29 inches. If you print on a form, use the margins required by the form.

Section 5

Install, Move, and Remove Sage Timberline Office

Sage Timberline Office uses Microsoft Installer (MSI) for the installation, repair, modification, and removal of Accounting and Management Products.

Install

The MSI installation occurs automatically when you install the Accounting and Management Products DVD. Use the Microsoft® Event Viewer to review the final status of the installation. You can find the **Event Viewer** in the **Control Panel** > **Administrative Tools** folder.

Auto-Repair

This feature occurs automatically when you start an application and does not require any action or response. MSI tracks important groupings of files that are necessary for an application to run. If an important component is missing, MSI restores these files from the original installation source.

If MSI detects missing components, you may notice a brief delay of approximately two minutes while MSI validates them. In a Sage Timberline Office server configuration, you will be prompted for the installation DVD unless the installation source was copied and installed from the hard drive. On a workstation running Sage Timberline Office, the utility retrieves the missing files from the shared Sage Timberline Office server if a valid network connection exists.

Use the Microsoft **Event Viewer** to review the changes made to the installation. You can find the **Event Viewer** in the **Control Panel** > **Administrative Tools** folder.

Modify

Use to add new programs or change program uses. This option is available when you reinstall a currently installed version of Accounting and Management Products on the server.

This utility proceeds through the traditional installation routine with the exception that you cannot change your registration name or client number.

To start the utility, insert your Accounting and Management Products DVD to begin the installation process. In the **Timberline Accounting Server - InstallShield Wizard** window, select **Modify**.

Remove

Use the **Remove** utility to permanently remove Sage Timberline Office products from a server or workstation. For additional information, see "Removing Accounting and Management Products" on page 21.

This utility removes application files and application registry folders which are created during the application installation process. It does not necessarily return the server or workstation to its original state. Files and registry values modified or created during the use of Accounting and Management products will still exist (for example, \HKEY_CURRENT_USER\Software\Timberline).

To start the utility, open the Windows **Add or Remove Programs** option, select **Timberline Accounting Server** or **Timberline Accounting Client**, and then click [**Remove**].

Alternately, you can insert your Accounting and Management Products CD to begin the installation process. In the **Timberline Accounting Server - InstallShield Wizard** window, select **Remove**.

Moving Accounting and Management Products to a New Server

WARNING: Incorrectly moving Sage Timberline Office data folders may severely damage your system. Sage Software is not responsible for damage to your data caused by incorrectly moving your Sage Timberline Office data folders. Before making changes to your Sage Timberline Office data, contact your system administrator for assistance and make a backup copy of all valued data.

We recommend that you upgrade your source server with 9.7 before you move to a new server. Verify that the installation is functioning correctly, then use the instructions below to move your program and data folders.

For detailed instructions for moving to a Windows 2003, Windows 2008, or a Vista server, host, or standalone workstation, log on to the knowledgebase at https://customers.sagenorthamerica.com/. After you have logged on, in the **Search** box type *How do I move Accounting and Management Products to a different drive, host, server, or standalone workstation?*

See "Sage Customer Knowledgebase" on page 23 for more details on how to access the Knowledgebase.

NOTE: Versions of Sage Timberline Office prior to 9.5 will not install correctly on a Vista, Windows 2007, or Microsoft Server 2008 operating system.

Removing Accounting and Management Products

A complete removal of the Accounting and Management Products includes running the uninstall program first then manually deleting the Program folder for Sage Timberline Office, manually deleting the application data folder for Sage Timberline Office, manually deleting the Current User registry keys for Sage Timberline Office, and uninstalling any third-party prerequisite products. If you decide to reinstall after doing a complete removal of Accounting and Management Products, you must restore all Accounting and Management Products folders and files from a backup and then reinstall the Accounting and Management Products.

Steps to Remove (Summary)

1 Backup the Sage Timberline Office program folder and all company data. Confirm that the backup was successful before continuing.

2 Remove Sage Timberline Office as described above.

3 Use Windows Explorer to delete the Sage Timberline Office folder (typically installed at X:\Program Files\Timberline Office).

4 Use Windows Explorer to delete the Sage application data folder (typically installed at *[Drive]*:\Documents and Settings\All Users\Application Data\Sage for Windows XP and Windows Server 2003, or *[Drive]*:\Program Data\Sage for Windows Vista and Windows Server 2008.

5 *(Optional)* Use the Microsoft Registry Editor to delete the registry key **\HKEY_CURRENT_USER\Software\Timberline**.

6 Use Windows **Add or Remove Programs** to remove Pervasive.SQL Server from the Sage Timberline Office Server. Use Windows **Add or Remove Programs** to remove Pervasive.SQL Workgroup from Sage Timberline Office workstations.

Section 6
Further Assistance

Online Help

Each Sage Timberline Office application includes Help, which provides many answers and instructions at the click of your mouse. To use Help, select Help Topics from the Help menu. An important feature of the Help system is What's This? Help. For detailed information about each field in an application, press F1 or click the question mark that appears on the toolbar or in the title bar of each window. Drag the question mark over the area in question and release.

Sage Customer Portal

Get instant access to software services and 24/7 support. Log on to find information about software updates and network patches, or view, update, and submit online support tickets. With the Sage Customer Portal, you will have access to the following services:

Sage Customer Knowledgebase

Access the Sage Customer Knowledgebase 24 hours a day, seven days a week for solutions and answers to thousands of topics as well as software alerts, notices, release guides, and year-end information. This is the same online tool our support staff uses when responding to calls from service plan customers.

To access the knowledgebase, go to https://customers.sagenorthamerica.com/ and click **Log on**.

1 Enter your email address and password, then click [**Log on**].

   a If you do not know your password, click the **Forgot your password?** link.
      Note: Do not click the **Need to register?** link.

   b Click **Reset Password**.

   c Enter and confirm your email address, then enter your first and last name. Click [**Submit**]. A new password will be sent to you.

2 After logging on to the portal, click the **Knowledgebase Search** link.

Release Updates

To get the latest information about this release, log on to the Sage Customer Portal. From the Home Page, click **Documents > For Customers > Sage Timberline Office > Release Materials.** Then click **Sage Timberline Office Release Documents**.

User Forums

Exchange information with Sage Timberline Office users. Log on to the Sage Customer Portal and click **Forums**.

Self Service

Manage your customer support relationship with Sage. View and submit Customer Support Tickets and Customer Service Requests online. Our Customer Support department is available to respond to online inquiries between 6 a.m. and 5 p.m. (Pacific Time) Monday through Friday.

Use the Self Service Details Sheet to view applications you own, the number of uses of each application, activation keys, and service plan information.

My Profile

View your individual profile, change your telephone contact information. Submit a Customer Service Request to a Sage representative to change other profile information.

Training Information

Learn about the Anytime Learning and Realtime Learning sessions that are available, view schedules of online sessions, or look for classroom training near you.

You can directly access Sage University from the Help menu in applications (**Help > Sage Timberline Office on the Web > Sage Software University**). This website offers a variety of professional product training options.

Contact Customer Support

Online Support Request

If you would like assistance with a solution and your service plan provides phone support:

1 Log on to https://customers.sagenorthamerica.com/.

2 Click **Support > Self Service.**

3 On the **My Requests** tab under "**Create**", click **Customer Support Ticket.**

4 Complete the form to submit a support ticket directly to Customer Support.

Phone Support

If you prefer to speak to Customer Support and your service plan provides telephone support assistance, in the U.S. or Canada call 800-551-8307. Support hours are Monday through Friday from 6 a.m. to 5 p.m. PT (Pacific Time).

Upgrading Your Service Plan

If your service plan does not provide online technical support and you would like to add or upgrade a service plan:

1 Call 800-858-7098, or log on to
   https://customers.sagenorthamerica.com/.

2 Select **Anonymous Portal Access** on the right.

3 On the **My Requests** tab under "**Create**", click **Customer Service Request.**

4 Complete the form to submit a service request.