Sage Timberline Office

Installation Guide

Accounting and Management Products 9.8
Estimating Products 9.8

sage

NOTICE

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03/2012

Contents—Installation Guide

Chapter 5: Server Migration 51

Installation Guide

Read the Supporting Documentation Before You Install

Be sure to read the following supporting documentation before you install:

- This *Installation Guide* includes an overview of this release, installation instructions, system requirements, and contact information.

- The Installation Checklist contains a brief description of the steps involved in upgrading your software.

- The *Important* document is shipped with your software and contains critical late-breaking topics.

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

- The *User's Guide* contains information about systems, security, Crystal reports, ODBC, and more.

To learn the more, log on to the Knowledgebase through the Sage Customer Portal at
https://customers.sagenorthamerica.com/irj/portal/anonymous/login

Introduction

About This Guide

This guide is designed to help you become familiar with the new features in this release, and learn about system requirements and installation changes. Review the instructions in Chapter 3 and Chapter 4 to install Accounting and Estimating. Chapter 5 contains an overview of the new server migration tool.

Conventions Used in this Document

This document uses the following conventions:

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

- Information you enter into the software is in bold type, as in the following example:
  Enter **Miscellaneous** in the **Amount Type** box.

- Names of keys are shown in capitals; for example, ENTER, TAB. A plus sign (+) between two key names indicates that you should press both keys at the same time; for example, SHIFT + TAB.

- The names of buttons you can click with your mouse are enclosed in bold type; for example, [**OK**] and [**Post**].

> **TIP:** Helpful information to make your experience better.

NOTE: This symbol draws your attention to information of particular interest, such as information not included in steps.

CAUTION: This symbol draws your attention to information that is important because it can help you avoid a costly or time-consuming error.

IMPORTANT: This symbol draws your attention to information that is of critical importance.

Menu Paths

In this document, menu paths show you the steps required to start a task. Here is a sample menu path:

PR:Tools > Download Taxes

To follow this path, open the Payroll module. From the **Tools** menu, select **Download Taxes**.

Support and Assistance

Online Help

Each Sage Timberline Office application includes Help, which provides answers to your questions about procedures as well as items in the windows.

To access Help in Sage Timberline Office:

- In a window, click the **Help** button or icon, or press [**F1**] to display the help topic for that window.
- In the Desktop, select **Help > Search for help on**, and then choose the desired module.

To aid you in finding the information you need, Help for each application includes the following tabs:

- **Contents** The table of contents is an outline of the Help for each application.
- **Index** Contains keywords that link to help topics related to that keyword.
- **Search** Type a search term and click [**Search**] to locate that text in the Help topics.

For more information about using Help, see Sage Timberline Office Desktop Help (in the Desktop, select **Help > Sage Timberline Office Desktop Help**).

We would like your feedback about Help so we can make improvements. Each Help topic contains an area where you can indicate whether the topic was helpful and provide additional comments. To protect your privacy, all comments are anonymous.

Training

Sage University offers online and classroom training sessions to help you get the most out of your Sage Timberline Office software. To access Sage University, from the Sage Timberline Office Desktop, select visit www.sageu.com.

You can also get access to Sage University from the Sage Timberline Desktop from **Help > Sage Timberline Office on the Web > Sage Software University**.

Technical Assistance

Depending on your Sage Service Plan, you may be able to take advantage of the following services:

Sage Customer Portal

You may log on to the Sage Customer Portal at https://customers.sagenorthamerica.com/irj/portal/anonymous/login to access any of the following:

- **Knowledgebase** Find answers to your questions, access downloads, and subscribe to your favorite articles. This service is available online 24/7.

- **Live Chat** Chat online with a customer support analyst - a great option for quick questions. Chat hours are Monday through Friday from 6 a.m. to 3 p.m. Pacific Time, with the same exceptions as telephone support (see below).

- **Online Support Request** Submit an online support ticket when you have a non-urgent question. One of our call center support analysts will assist you. Online support hours are the same as our customer support call center hours (see below).

Sage Customer Support Call Center

Telephone Support When you have a more urgent question or would prefer to speak to a customer support analyst directly, call us at 800-551-8307. Telephone support is available Monday through Friday from 6 a.m. to 5 p.m. Pacific Time with the following exceptions:

- Every Thursday from 2 p.m. to 3 p.m. Pacific time (closed for customer support staff meetings)

- Standard United States holidays

- Quarterly company meetings

Upgrading Your Service Plan

If your service plan does not provide online or telephone customer support and you would like to add or upgrade a service plan, please call 800-858-7098.

Phone Support for Australia and New Zealand

- **For Support in Australia:** Call 1800 120369 or send an email to support.pacific@sage.com. Support hours are Monday through Friday from 9 a.m. to 5 p.m. AET (Australian Eastern time).

- **For Support in New Zealand:** Call 0800 904409 or send an email to support.pacific@sage.com. Support hours are Monday through Friday from 9 a.m. to 5 p.m. AET (Australian Eastern time).

- **For Support in Asia-Pacific and other International Areas:** Call +503-533-2181. Support hours are Monday through Friday from 8 a.m. to 5 p.m. AET (Australian Eastern time)

Upgrading Your Service Plan

If your service plan does not provide online technical support assistance you may add or upgrade a service plan by calling:

1300 222 722 in Australia

0800 904409 in New Zealand

You may also email us at: softwareassurance.pacific@sage.com.

Submitting Enhancement Requests

We want to hear your suggestions for improving the software. To send us your comments, select **Help > Sage Timberline Office on the Web > Submit Enhancement Requests**.

Chapter 1: Release Overview

New Features in Accounting 9.8

You will find the following enhancements to Sage Timberline Office in this release:

Credit Card Management

The new Accounts Payable credit card management feature allows you to record and track credit card purchases, bank fees, and miscellaneous charges. You can record credit card receipts, reconcile the credit card statement against the receipts, track your balances, and select how you will pay the credit card issuer. In addition, you can record credit card payments or Electronic Funds Transfer (EFT) against existing invoices.

For detailed instructions on setting up and working with the credit card management feature, open **Accounts Payable Help**. Enter "credit card management" in the Index tab to access detailed Help topics.

To get started, set up a liability account for credit cards in **General Ledger**, then add the **Credit Card Payable Account** in **Accounts Payable: AP Settings > GL Entry Settings**.

Set up each credit card issuer as an AP vendor in **Setup > Vendors**, then set up one or more credit cards for each account or cardholder in **Setup > Credit Cards**.

As your employees turn in credit card receipts, open **Tasks > Record Payments by Credit Card** to record the transactions for each credit card. When you receive the billing statement from the credit card company, use **Tasks > Verify Statement Balance** to reconcile the transactions for each card. Once you've verified all the transactions on the statement, you can generate an invoice for the credit card (issuer) vendor from the **Verify Statement Balance** window. The invoice can be paid later by check. If the balance due is automatically deducted from your bank account, you can use **Tasks > Record Manual/Print Quick Checks** to record an electronic payment (EFT). Click [**Help**] in each task for detailed instructions.

NOTES:

- You can use the credit card management features described above if your accounting method is accrual. If your accounting method is cash or cash and accrual, see the Help topics on managing credit card transactions on a cash basis.

- Reports that use the AP Invoice Payment, Distribution Payment, Tax Distribution Payment and Lien Waiver records have been modified. If you have customized reports that use these records, open the reports in Report Designer and resave them. If you run these reports prior to resaving them, you will receive a prompt to resave them. The reports are upgraded and will run without error even if you do not resave them. The prompts will no longer appear after you resave.

- Lien waiver records are created and saved when you enter data and click [**Finish**] in **Tasks > Record Payments by Credit Card**.

- Set up task security to allow users to access the **Setup > Credit Cards, Tasks > Record Payments by Credit Card** and **Tasks > Verify Statement Balance** features.

Pervasive Update

For compatibility with the latest version of the Pervasive database, we have updated the file formats of Sage Timberline Office files.

✳ **IMPORTANT:** The upgrade may cause file sizes to increase up to 200% of the current size of your data. Be sure and allow for increased disk space requirements when you upgrade to 9.8. Do not install Sage Timberline Office products until you have sufficient hard disk space available.

Server and Data Migration Tools

The new server and data migration tools allow you to easily transfer your Sage Timberline Office Accounting customizations and data to a new server. Items such as reports and reports menu, inquiries, formulas, macros, and custom fields can be moved. Company data, security settings and attachments can also be moved with the server migration tool. You can select which companies you want to move, giving you the flexibility to move all companies or only move selected companies.

To learn more about the server and data migration tools, see Chapter 5: Server Migration.

Journals Enhancements

Automatically Print Journals

Use this option to automatically print your journals to a file, rather than selecting **Print to file** each time you finish and print. This new option will save you time and keystrokes. You can set up the option and the naming convention for journal folders and journal files in **Tools > Options > Journals**.

> **TIP:** Add the date and time to the **Journal File** name to eliminate the possibility of overwriting journals.

Forced Page Breaks Removed

Frequently used accounting journals have been updated to remove forced page breaks, allowing those journals to be printed on one page.

📋 **NOTE:** If the journal was created using Report Designer, the first page will print the design and the second page will print the report.

Print Audit Activity

Select **Tools > Options > Print audit activity** to print a journal when changes are made to fields controlled by the **Audit Setup Activity** setting.

Aatrix Updates

Human Resources Forms (US only)

You can now access many of the forms you need to provide documentation for every aspect of employee relations and payroll management, as well as a sample handbook. You can set up alerts to remind you when important tasks need to be performed; for example, when an employee reaches the end of their probationary period or when COBRA letters need to be sent. You can customize many of the forms to suit your business. All forms can be printed. Employee and company data from Sage Timberline Office is used to create the forms. You can also choose to create blank forms. To access Aatrix HR forms, open **Payroll: Tasks > Generate HR Forms**.

🗒 **NOTES:**

- Set up Task Security to allow users to access the HR Forms feature.

- HR alerts will notify you when you are in one of the following tasks:

  - **Accounts Payable > Government eFile and Reporting Form 1099 (USA)**

  - **Accounts Payable > Government eFile and Reporting > Form T5018 (CAN)**

  - **Payroll > Tasks > Quarterly Reporting > State eFile and Reporting**

  - **Payroll > Tasks > Federal Reporting > Federal eFile and Reporting**

  - **Payroll > Tasks > Generate HR Forms.**

Federal WH-347 (US)

You can now print the WH-347 Certified Payroll report through Aatrix. To access this and many other state and federal reports, open **Payroll: Tasks > Federal Reporting > Federal eFile and Reporting** or **Tasks > Quarterly Reporting > State eFile and Reporting**.

Canadian ROE Form

You can now eFile a Canadian Record of Employment form through Aatrix. To access this and many other reports, open **Payroll: Tasks > Federal Reporting > Federal eFile and Reporting**.

Live Chat With a Support Representative

You can now access Live Chat with a Customer Support representative from within any application in the software. Live Chat is a great option for quick questions. Click **Help > Live Chat**, then log in. Select **Support**, then **Live Chat** to initiate a session.

New InfoCenter tab in Desktop

You can now find all the information you need about Sage Timberline Office products and services, including new enhancements, technical tips, training, special offers and much, much more. To access the new InfoCenter, open **Desktop** and click the **InfoCenter** tab.

Use SMTP to Send Email

In **Tools > Options > Mail Settings**, you can set up your email system to use SMTP to send email. After you set up your system, click the [**Test SMTP mail**] to send a test email. The system will continue to use Simple MAPI if you do not set up SMTP.

NOTES:

- You may need to change your anti-virus settings to allow Sage Timberline Office applications to send email via SMTP. Click [**Help**] in the **Mail Settings** window for instructions on adding exclusions to your anti-virus software.

- Using Simple MAPI causes a security warning to appear each time you send an email from Sage Timberline Office. This message no longer appears if you use SMTP.

- Be aware that messages sent using SMTP do not appear in your "Sent" email folder, and therefore cannot be attached to the Project Management Correspondence Log. To record messages you send, enter your own email address in the Cc box of each message you wish to attach to the Correspondence Log.

Microsoft Office 2010 Compatibility

Sage Timberline Office 9.8 is compatible with 32-bit MS Office 2010. When you install Microsoft Office 2010, select to install the 32-bit version. Sage Timberline Office will not work with the 64-bit version.

NOTE: Sage Timberline Office 9.8 is required for Document Management and Project Management Correspondence Log to work with MS Office 2010.

Performance Enhancements

We have made general enhancements to the performance of Sage Timberline Office in the 9.8 release. You may experience faster performance with 9.8.

New Change Request Task Security

Administrators can now secure the **Update Job Estimate** task which appears in **Project Management: Contract Control > Change Requests** and **Change Orders**. If **Allow Update Job Estimate** is selected in **Task Security**, the user can update the job estimate as pending. If **Allow Update Job Estimate Approved** is selected, the user can approve the new estimate. If neither are selected, the user can not update job estimates.

Inquiry File Type Selections Persist

The system now remembers which file selections you made in Inquiries, and opens those selections when you next open that inquiry. This will save you time and keystrokes. For example, if you selected the **Current.jct** when you last ran the **Job Cost: Inquiry > Cost Control > Profit** inquiry, **Current.jct** is selected the next time you run the inquiry.

Create Tax Rate and Tax Group Records in ODBC

You can now create and update Tax Rate and Tax Group records in ODBC.

Sage Timberline Office now available as a Download

The 9.8 Accounting and Management Products and 9.8 Estimating Products are delivered as a download. Refer to Knowledgebase article KB980 for more information.

Installation Changes for 9.8

9.8 Available as a Download Only

As part of our ongoing efforts to "Go Green", we will deliver our 9.8 release via software download only. In addition to being more environmentally conscientious, this approach also helps us get the release into your hands more quickly than traditional shipping methods. For more information, see Knowledgebase article KB980.

Full Workstation Installations

The Accounting workstation install no longer includes an option to install partially in order to integrate with Estimating. Full Accounting installations are now required.

Application Files Installed to Shared Location

To increase system performance, we have moved the location of the .exe files to the **X://Program Files/Timberline Office/Shared** folder. We have placed links in the Accounting folder so that shortcuts you may have in place will continue to work.

> **NOTE:** If you set up a shortcut to Desktop, you must re-create it after installing 9.8. Select the Desktop.exe in **C:\ProgramFiles\Timberline Office\Shared**. All other applications' shortcuts will continue to work after installing 9.8.

New Features in Estimating 9.8

The following features are new for the 9.8 release.

Total Cost/Unit Adjustments

Previous releases required you to use the **Adjust Column** feature to edit a spreadsheet item's Total Cost/Unit. With this release, you can now edit the Total Cost/Unit by typing a new value directly into the spreadsheet cell.

Item Attachments

You can now attach an item, such as a PDF file, text file, image file, or hyperlink, to a database item. You make such item attachments in either the **Database Item** window or the estimate spreadsheet **Detail** window. You can also right-click on any item in an estimate spreadsheet and attach an item using the shortcut menu.

If you take off an item with an attachment, the attachment is taken off with the item. You can view the attachment at any time by right-clicking on it and selecting **View Attachment** from the shortcut menu.

Reprice Crews Using the Estimate Information Window

In previous releases, Sage Timberline Office Estimating required you to use the Reprice Crews feature to change the crew rate table for those items already in a spreadsheet. You can now reprice estimate items by selecting another rate table on the **Crew Pricing** tab of the **Estimate Settings** window.

Chapter 2: System Requirements

Be sure you read and understand this section before you install.

Supported Operating Systems

Sage Timberline Office supports the operating systems and service packs listed below. The service packs listed are the minimum required for installing Sage Timberline Office 9.8. You will realize optimal system performance by using up-to-date computer hardware.

For more information about Sage Timberline Office and the system environments, see the section on System Guidance in the *User's Guide*.

For help in selecting the right business-class computers for your business-class software, contact your authorized business partner.

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

Operating System	Minimum Service Pack	
Windows 7 Professional		**NOTE:** Within this document, "Windows 7" refers to all supported editions unless noted specifically.
Windows 7 Ultimate		
Windows 7 Enterprise		
Windows Server 2003 Small Business Server	SP2	**NOTE:** Within this document, "Windows Server 2003" refers to all supported editions unless noted specifically.
Windows Server 2003 Enterprise Edition	SP2	
Windows Server 2003 Standard Edition	SP2	
Windows Server 2003 R2 Small Business Server		**NOTE:** Within this document, "Windows Server 2003" refers to all supported editions unless noted specifically.
Windows Server 2003 R2 Enterprise Edition		
Windows Server 2003 R2 Standard Edition		
Windows Vista Business	SP2	**NOTE:** Within this document, "Vista" refers to all supported editions unless noted specifically.
Windows Vista Ultimate	SP2	
Windows XP Professional	SP3	

* **64-bit compatibility**– Sage Timberline Office Accounting and Management Products, Estimating Products, and Residential Management applications are compatible with 64-bit operating systems. Some third-party software is not currently compatible. For a complete list, see "Sage and Third-Party Compatibility with 64-Bit Operating Systems" on page 19.

> **NOTE:** Sage Timberline Office 9.8 is compatible with 32-bit MS Office 2010. When you install Microsoft Office 2010, select to install the 32-bit version. Sage Timberline Office will not work with the 64-bit version.

****Windows Server 2008 compatibility**– Sage Timberline Office Accounting and Management Products applications, Estimating, Document Management, and Residential Management are compatible with Windows Server 2008.
Estimating Cut and Fill 5.23.0 and some third-party hardware and software products are not currently compatible. This includes GTCO TabletWorks 10.08 driver and Primavera Project Planner (P3) 3.0. For a complete list, see "Sage and Third-Party Compatibility with Windows Server 2008" on page 20.

NOTE: Estimating Database Editor is not supported on Windows Terminal Services.

Recommended Minimum Processor

A Pentium 4 (P4) or later processor with a minimum of 2 gigahertz (GHz) processing speed is recommended for the server that hosts Sage Timberline Office and for the workstations using Sage Timberline Office. Having a fast processor on both the server and workstations will improve your system's performance.

Recommended Minimum Random Access Memory (RAM)

A minimum of 2 gigabytes (GB) of RAM is recommended for the server that hosts Sage Timberline Office and for the workstations using Sage Timberline Office. As a general rule, the more RAM you have on the server and workstations, the better your performance will be. Workstations with Vista or Windows 7 operating systems use more memory, so you may want to increase the RAM on Vista or Windows 7 workstations.

Hard Disk Space Required for Installation

The following tables list the hard disk space necessary to install Sage Timberline Office on a server, stand-alone computer, and workstation. Use this information to calculate your hard disk space requirements based on the applications that you install. Having adequate free space on the hard disk, a fast processing speed, and adequate RAM can improve your performance.

> ✳ **IMPORTANT:** Do not install Sage Timberline Office products until you have sufficient hard disk space available.

Server or Stand-Alone Computer

Product	Available Hard Disk Space	Purpose and Considerations
Accounting and Management Products	Up to 2 GB	For program files. Depends on the number of applications installed.
Estimating Products	Up to 650 MB	For program files.
Residential Management	Up to 580 MB	For program files.
Document Management	Up to 200 MB	For program files. Depends on configuration.
Third-Party Components	Up to 400 MB	Installed by Sage Timberline Office as necessary.

Workstations

Product	Available Hard Disk Space	Purpose and Considerations
Accounting and Management Products	Up to 450 MB	For program files. Depends on the number of applications installed. This assumes that a server hosts Accounting and Management data.
Estimating Products	Up to 650 MB	For program files.
Residential Management	Up to 580 MB	For program files.
Document Management	Up to 100 MB	For program files. Depends on configuration.
Third-Party Components	Up to 400 MB	Installed by Sage Timberline Office as necessary.

Hard Disk Space Required for Database Growth

The following table lists general guidelines regarding the hard disk space necessary for the growth of the Sage Timberline Office database. Use this information to calculate your hard disk space requirements per year based on usage. Your actual requirements will vary based on your actual usage.

Product	Hard Disk Space Per Year	Usage Definitions and Considerations
Accounting and Management Products	Active User: 1 GB	10 or more data entry clerks.
	Modest User: 400 MB	1 or 2 active data entry clerks.
Estimating Products	Active User: 6-9 GB	Database size varies primarily based on complexity and use.
	Per Estimate: 10 MB each	No estimate archive.
Residential Management	Active User: 500 MB	Database size varies primarily based on use.
	Modest User: 100 MB	
Document Management	Active User: 50 GB	Scans 1700 black and white pages per week with 200-300 dots per inch (DPI).
	Modest User: 10 GB	Scans several hundred black and white pages per week with 300 DPI. Database size varies primarily based on scanning resolution and use. See the *Document Management Technical System Reference* for more information about predicting your future disk space.

Hardware Requirements

Sage Timberline Office requires the following hardware.

Hardware	Purpose and Specifications
Network adapter	Connects computer to a network. Must be high quality.
Ports 443 and 80	For connecting hardware, such as a printer, to the computer. Set up firewall to accept these ports.
Port 25	To send email with Sage Installation Manager, Sage Timberline Office, and Document Management.
Printer	A Microsoft Certified printer driver is recommended.
Sound adapter	For audio playback.
Super VGA monitor	For high-resolution color display. 1024 pixels by 768 pixels is recommended.

Software Requirements

Sage Timberline Office requires the following software:

Software	Purpose and Specifications
Adobe Reader 5.0 or later	For viewing software documentation in Adobe PDF format. For faxing and sending documents from Sage Timberline Office. Free downloads are available at www.adobe.com.
Crystal Reports Professional 11.5 SP 3 or Crystal Reports 11.5 SP 3 for Sage	For modifying and creating Crystal Reports designs. Crystal Reports for Sage is installed as a prerequisite.
Faxing service	Simple Mail Transfer Protocol (SMTP) fax solution, Vista fax solution. For sending faxes in applications with this feature.
Microsoft Internet Explorer 6.0 Service Pack 1 or later	For software updates, customer support, and Help.
Microsoft .NET 3.5 Service Pack 1	Installed as a prerequisite. If not already installed, it will restart your server and workstations after the prerequisites are installed.
Microsoft Office 2003 SP 3 or later*	For Correspondence Log features in Project Management and for importing Sage Timberline Office data into Microsoft Excel or Microsoft Query. Sage Timberline Office is not compatible with 64-bit MS Office 2010.
Microsoft Outlook 2003 SP3 Microsoft Outlook 2007 SP2 Microsoft Outlook 2010*	For email features.
UniMessage Pro	For online faxing in Purchasing and Inventory.
Windows Services	Print service for printing. Log Viewer for troubleshooting. Print service and Log Viewer must be available on the server and workstations.

* Sage Timberline Office 9.8 is compatible with 32-bit MS Office 2010. When you install Microsoft Office 2010, select to install the 32-bit version. Sage Timberline Office will not work with the 64-bit version.

In order to use MS Office 2010 with Correspondence Log and Document Management, you must have installed Sage Timberline Office 9.8.

Supported Protocols

Protocol	Purpose
Transmission Control Protocol/Internet Protocol (TCP/IP)	Microsoft servers default to this protocol.
Remote Display Protocol (RDP) 5	Microsoft remote protocol, which is used in its remote connection applications.
Independent Computing Architecture (ICA)	Citrix remote protocol, which is used in its remote connection application.
SMTP	Email protocol used in Document Management, Sage Timberline Office applications, and Sage Installation Manager.

Additional Products Required for Estimating

Hardware or Software	Purpose and Specifications
Digitizing tablet or USB port	For Estimating Digitizer. Connect to RS-232 serial port and configure as COM1 or COM2. **NOTE:** Document Management also requires a USB port.
GTCO Wintab digitizer software	For Estimating Digitizer. Supplied by your digitizer manufacturer.
SafeNet Sentinel SuperPro USB hardware key (dongle)	For Estimating and License Management.
SafeNet Sentinel driver	Installed as a prerequisite for Estimating license management. To install a driver manually, open **...\980_Rev2_Estimating\Prerequisites\SafeNet\Sentinel Protection Installer<version x.x>.exe**.

NOTE: Estimating Database Editor is not supported on Windows Terminal Services.

Sage and Third-Party Compatibility with 64-Bit Operating Systems

At the time of this release, the following Sage and third-party software were not supported on 64-bit operating systems. For more information, visit the website of the software in question.

Not Compatible with 64-Bit Operating Systems
Primavera Project Planner (P3) 3.1 and earlier
Sage Master Builder v13.3 and earlier

Sage and Third-Party Compatibility with Windows Server 2008

At the time of this release, the following Sage and third-party software were not supported on Windows Server 2008.

For more information, visit the website of the software in question.

Not Compatible with Windows Server 2008
GTCO TabletWorks 10.08 driver
Primavera Project Planner (P3) 3.0
Sage Master Builder v13.3 and earlier
Sage Timberline Office - Estimating Cut & Fill 5.23.0

Required Privilege Settings

The following sections describe the access rights you need to successfully install and use Sage Timberline Office.

Elevate Permissions on Windows Vista and Windows 7

You must elevate your permissions before upgrading Sage Timberline Office.

You can usually start a program with elevated privileges by right-clicking the application and selecting **Run as Administrator**. In Sage Timberline Office open X:/Program Files/Timberline Office/Accounting.

During certain installation tasks, you will receive another prompt to elevate your privileges. If you do not acknowledge each prompt within two minutes, the installation process will quit the task. If this occurs, you will receive a separate prompt asking you to retry the task. Click [**Retry**] and then elevate your privileges at the prompt.

Sage Timberline Office Program Files and Data Files

You must have full control access rights to all folders or shares that contain Sage Timberline Office program files and data files.

Windows XP Professional, Windows Server 2003, Windows Vista, Windows 7, and Windows Server 2008 have stricter default access rights settings than earlier Microsoft operating systems.

When you create a share for a folder, users get read access instead of full control access. For example, when you create a shared folder to which you will install Sage Timberline Office, you must manually grant full control access to users who will access this folder.

Full Control of Specific Files and Folders Required

To use Sage Timberline Office, you must have full control of the following files and folders on your file server, terminal server, and workstations that have Sage Timberline Office 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 affect 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.

NOTE: Some of these folders may be hidden. To view them on:

- **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 and select **Organize > Folder and Search Options**, then select **Show hidden files and folders** on the **View** tab.

Product	Operating Systems	Required Folders and Files	Location and Specifications
Sage Timberline Office	All	*[Drive]*:\Program Files\Timberline Office	This folder is located on the server, terminal server, and workstations where you installed Sage Timberline Office. It is the default installation location for Sage Timberline Office. However, depending on your system configuration, your company may have renamed this folder or installed it to a different location.
Sage Timberline Office	Windows Vista Windows 7 Windows Server 2008	*[Drive]*:\Users\ *[username]*	This folder is located on the workstation or terminal server where you use Sage Timberline Office. Sage Timberline Office installs necessary files to this folder and requires that the user has full control of it. Typically, the user has full control of this folder by default.

Product	Operating Systems	Required Folders and Files	Location and Specifications
Sage Timberline Office	Windows XP Windows Server 2003	*[Drive]*:\Documents and Settings*[username]*	This folder is located on the workstation or terminal server where you use Sage Timberline Office. Sage Timberline Office installs necessary files to this folder and requires that the user has full control of it. Typically, the user has full control of this folder by default.
Accounting and Management Products	All	Company data folder	Typically, the data folder is located on the server where you installed Accounting and Management Products.
Accounting and Management Products	Windows Vista Windows 7 Windows Server 2008	*[Drive]* :\ProgramData\Sage\ Timberline Office	This folder is located on the server or host machine where you use Accounting and Management Products. This folder must be shared. Sage Timberline Office installs necessary files to this folder and requires that all users have full control permissions to this folder and all of its subfolders.
Accounting and Management Products	Windows XP Windows Server 2003	*[Drive]*:\Documents and Settings\All Users\ Application Data\Sage\ Timberline Office	This folder is located on the server or host machine where you use Accounting and Management Products. This folder must be shared. Sage Timberline Office installs necessary files to this folder and requires that all users have full control permissions to this folder and all of its subfolders.
Estimating Products	All	Database and estimates	Typically, these files are located on the server and the workstation where you installed Estimating Products.

Product	Operating Systems	Required Folders and Files	Location and Specifications
Estimating Products	Windows Vista Windows 7 Windows Server 2008	*[Drive]*:\Users\ Public\Estimating	This folder is located wherever you use Estimating Products. Sage Timberline Office installs necessary files to this folder and requires that all users have read/write permissions to this folder and all of its subfolders.
Estimating Products	Windows XP Windows Server 2003	*[Drive]*:\Documents and Settings\All Users\Estimating	This folder is located wherever you use Estimating Products. Sage Timberline Offices installs necessary files to this folder and requires that all users have read/write permissions to this folder and all of its subfolders.

Full Control of and Read Access to Specific Registry Keys Required

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

- HKEY_CURRENT_USER

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

- HKEY_Local_Machine\Software\ODBC

- HKEY_Local_Machine\Software\Pervasive Software

- HKEY_Local_Machine\Software\Timberline

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 should see Microsoft Registry Editor Help topics for detailed instructions.

Compatible Versions

The following versions of Sage Timberline Office are compatible with each of the others:

- Accounting and Management Products 9.8

- Document Management 9.8

- Estimating Products 9.8

- Estimating Products 11

- Residential Management 9.8

NOTE: If you use both Residential Management and Estimating, install Estimating before you install Residential Management.

Supported Upgrade Paths

Accounting

You must be running Accounting and Management Products version 9.4 or later in order to upgrade to 9.8. If you are running a version that is earlier than 9.4, we recommend that you upgrade to version 9.4 before you upgrade to 9.8. Contact your Business Partner for assistance.

Upgrade from	Upgrade Path
9.4.1–9.7	Upgrade directly to 9.8.
8.3.x–9.3.x	Upgrade to 9.4.x. Then, upgrade to 9.8.
7.5.0–8.2.3	Upgrade to 8.3.x or 9.1.x. Next, upgrade to 9.4.x. Then, upgrade to 9.8.
7.0.0–7.4.0	Upgrade to 7.5.x or 7.6.x. Next, upgrade to 8.3.x or 9.1.x. Next, upgrade to 9.4.x. Then, upgrade to 9.8.
5.4.x or earlier	1. From TS-Main, select **Tools > File Doctor** and apply this utility to all files before you upgrade your 5.4.x installation. You cannot wait until after the upgrade to perform this check because later versions of File Doctor are not compatible with 5.4.x data. 2. Upgrade to 7.5.x or 7.6.x. 3. Upgrade to 8.3.x or 9.1.x. 4. Upgrade to 9.4.x. 5. Upgrade to 9.8.

Estimating

You can upgrade any Windows-based version of Estimating Products (beginning with 1.0) to Estimating Products 9.8.

For information about Estimating 11, see the accompanying documentation.

Required Data File Upgrades

You must upgrade all Accounting and Management application data files after you install 9.8.

NOTE: You can upgrade the data files for Accounting applications—except for Service Management, Purchasing, and Inventory—using **TS Main > Tools > Upgrade files** or **Sage Timberline Office > Desktop > Tasks > Common Tasks > Tools > Upgrade files**. Service Management, Purchasing, and Inventory data files upgrade the first time you open those application. You must open the application and perform the upgrade at the server. Upgrading this data on a workstation will incorrectly set DSNs and cause data access errors after the upgrade is performed.

Chapter 3: Install Accounting

A. Before You Install

- Read the *Release Notes* for more information regarding this release of Sage Timberline Office.

- Read and understand the system requirements on page 11.

- Review the Installation Checklist.

- If you use Estimating products, install Accounting 9.8 before Estimating 9.8.

1 If you are upgrading, create a complete backup of all Sage Timberline Office data and program files.

2 Install the appropriate operating system service pack, make sure sufficient hard disk space is available, and verify that your server and workstations meet all other hardware and software requirements. For example, Accounting and Management Products require up to 2 gigabytes (GB) of available hard disk space in the following location on your server:

   - XP and Windows Server 2003 - X:\Documents and Settings

   - Vista, Windows 7, and Windows Server 2008 - X:\ProgramData

> ✳ **IMPORTANT:** The upgrade may cause file sizes to increase up to 200% of the current size of your data. Be sure and allow for increased disk space requirements when you upgrade to 9.8. Do not install Sage Timberline Office products until you have sufficient hard disk space available.

3 Make sure that you have full control of the required folders, files, and registry keys on your file server, terminal server, and workstations that will have Accounting and Management Products installed. For a list of the required folders, files, and registry keys for your operating system, see "Required Privilege Settings " on page 20.

4 Quit 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.

5 **Windows Vista, Windows 7, and Windows Server 2008–**You must elevate your permissions before installing Sage Timberline Office. During certain installation tasks, you will receive another prompt to elevate your privileges. If you do not acknowledge each prompt within two minutes, the installation process will quit the task. If this occurs, you will receive a separate prompt asking you to retry the task. To retry the task, click [**Retry**] and then elevate your privileges at the prompt.

6 If you are upgrading from Sage Timberline Office 9.4.x, use Report or Inquiry Manager to rename duplicates of reports and inquiries within the same application so that each report has a unique report or inquiry name. Starting in Sage Timberline Office 9.5, Security Administration applies security settings to only one instance of a report or inquiry. By using unique report and inquiry names, you can ensure that the security settings applied in previous versions of Sage Timberline Office are carried forward. Otherwise, other instances of the report or inquiry will be unsecured after upgrading.

7 If you have Estimating Products on the server or workstation, you should remove them before beginning to install Accounting products. Go to **[Start] > Settings > Control Panel > Add or Remove Programs** and select **Estimating**.

8 Determine which installation instructions to read in this document. Most users should start with "B. Install to a Server or Stand-Alone Computer" on page 28. If you have a terminal server or peer network, start with "D. Other Installation Scenario" on page 32. If you are installing Estimating only, see "Chapter 4: Install Estimating" on page 39.

B. Install to a Server or Stand-Alone Computer

✳ **IMPORTANT:** Do not install Accounting and Management Products unless you have sufficient hard disk space available. See "Hard Disk Space Required for Installation" for more information.

The installation process may restart your server or stand-alone computer several times.

1 At the server or stand-alone computer, log on with full administrative rights. Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives). If you are unsure whether you have full administrative rights, ask your network administrator for assistance. Alternately, you can ask your network administrator to log on with the network administrator ID before you start the installation.

2 Download the software. For details about the download, see Knowledgebase article KB980.

3 In the **Installation** window, click **Install Sage Timberline Office software**. This step installs prerequisite components necessary to run Sage Timberline Office applications.

NOTES ABOUT INSTALLING PREREQUISITES:

■ If you receive a firewall warning message during the installation of the Pervasive database engine, work with your network administrator to allow the Pervasive database engine to communicate through your firewall software. For example, if a Microsoft Windows Firewall **Security Alert** window lists the **Database Service Manager** by **Pervasive Software Inc.**, confirm with your network administrator that you wish to proceed. Then, select **Unblock this program** and click [**OK**].

■ You may receive a similar message during the installation of Sage Service Host. Follow the same steps to proceed.

■ If .NET 3.5 SP1 is not already installed, it will be installed with other prerequisites. If .NET 3.5 SP1 is installed as a prerequisite, the system will restart your server and workstations after the prerequisites are installed.

■ If you are required to restart your computer, remember to stop antivirus, backup, and other services that may have automatically started again after you restart your computer.

4 Follow the on-screen prompts to install the software.

5 At the conclusion of the installation, you will be prompted to restart your computer. After you restart your computer and log on with full administrative rights, wait until the message **All configuration tasks for Sage Timberline Office completed successfully**. Do not attempt to start any Sage Timberline Office applications until after you have received this message. It may take awhile before you see the message.

6 Some of the data and report folders and files will be hidden by default. At the end of the installation, you can display hidden files and folders:

- On Windows XP Professional or Windows Server 2003, open Windows Explorer, select **Tools > Folder Options**, and select **View hidden files and folders** on the **View** tab.

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

7 If you have not yet removed Estimating from the server, a message will appear that asks you to remove it before proceeding. Remove Estimating Products from **[Start] > Settings > Control Panel > Add or Remove Programs**. Then, continue with the installation of Accounting and Management Products. Afterwards, follow the instructions in "Chapter 4: Install Estimating" on page 39 to upgrade Estimating Products.

Automatic Creation of Timberline Office Share

The installation automatically creates a shared Timberline Office folder on the server if one does not already exist. Read and write permission are automatically granted to the Everyone group. If the Timberline Office folder is already present and shared, the installation will skip this step. The system will not change any permissions you have already set up.

You will connect your workstation to the shared **Timberline Office** folder in the next section.

C. Install to a Workstation Connected to a Network

After you install to a server ("B. Install to a Server or Stand-Alone Computer" on page 28), follow these steps to set up your workstations.

✳ **IMPORTANT:** Do not install Accounting and Management Products unless you have sufficient hard disk space available. See "Hard Disk Space Required for Installation" for more information.

📋 **NOTE:** The installation process may restart your workstations several times.

Installing to a Terminal Server

If you are installing to a workstation that will be used as a terminal server, follow installation steps A, B, and C, with these exceptions:

- Use **Add or Remove Programs** to start an installation to a terminal server. This makes the software available to remote operators.

- If you are installing Sage Timberline Office on a Windows Server 2008 terminal server, begin the installation by selecting **Control Panel > Install Application on Terminal Server**. Follow the prompts and browse to the **install.exe** file.

NOTE: In Windows Server 2008 R2, "terminal services" is called "Remote Desktop".
Open **Start > Control Panel > Install Application on Remote Desktop**
or **Start > Control Panel > Programs > Install Application on Remote Desktop**.

Follow the prompts and browse to the **install.exe** file.

- If your terminal server does not host Sage Timberline Office programs and data files:

  ▫ Install to the server as if it were a workstation. Perform the steps in "C. Install to a Workstation Connected to a Network" on page 29.

  ▫ After you install Sage Timberline Office, verify that the Pervasive.SQL database service on the terminal server uses an account with access rights to the **Local System** account and access to all Sage Timberline Office program and data files. To verify your account and access rights, select **Start > Programs > Administrative Tools > Services** on the terminal server. In the **Services** window, right-click the **Pervasive.SQL** service and select **Properties**. Then, on the **Log On** tab, select **[Use this account]**. Work with your network administrator to enter an account that has the access rights of the **Local System** account and access to all Sage Timberline Office program and data files on the file server.

  ▫ For more information about using terminal services, see "C. Install to a Workstation Connected to a Network," on page 29.

NOTE: The **Local System** account, which does not typically have access to files located on another server, should not be selected on the **Log On** tab. If you use an account with insufficient access rights, you may receive a Pervasive status code 94 or 3119 error.

Installing to a Workstation

1 If you have Estimating Products on the workstation, you will need to remove Estimating Products before you proceed. Remove Estimating Products from [**Start**] > **Settings** > **Control Panel** > **Add or Remove Programs**.

2 At the workstation, log on with full administrative rights. Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives). If you are unsure whether you have full administrative rights, ask your network administrator for assistance. Alternately, you can ask your network administrator to log on with the network administrator ID before you start the installation.

3 Establish a connection with the shared **Timberline Office** folder on the server or peer server by mapping a drive to it.

  a In Windows Explorer, click **Tools > Map network drive**.

  b Select a letter for the drive name.

  c In the **Folder** box, browse to **[Server Name]\Timberline Office**.

✳ **IMPORTANT:** We strongly recommend mapping a drive to the location listed above. Mapping to a different folder can cause unexpected errors. In addition, when mapping a drive to the shared **Timberline Office** folder, do not disconnect or redirect existing mapped drives for Sage Timberline Office products to the new location.

While we recommend the use of mapped drives to establish a connection with the shared folder, you may also use a UNC path. For example, if you choose to use a UNC path to the shared data folder, the UNC path is *[Server name]*\Timberline Office\9.5\Accounting\WinInst\Install.exe. See step 5 below for instructions.

4 Click [**Start**] > **Run**.

5 In the **Run** window, click [**Browse**]. In the **Browse** window, select **Install.exe** in the **Wininst** folder on the server.

- If you are using mapped drives, select T:\9.5\Accounting\WinInst\Install.exe, where T is the drive you mapped to the **Timberline Office** folder in step 3.

- Alternatively, if you are using UNC paths, select \\[Server name]\Timberline Office\9.5\Accounting\WinInst\Install.exe. Click [**Open**]. Then, click [**OK**].

6 In the **Installation** window, click **Install Timberline Office software**. This step installs components necessary to run Sage Timberline Office applications.

📋 **NOTE:** If you receive a firewall warning message during the installation of the Pervasive database engine, work with your network administrator to allow the Pervasive database engine to communicate through your firewall software. For example, if a Windows Firewall **Security Alert** window lists the **Database Service Manager** by **Pervasive Software Inc.**, confirm with your network administrator that you wish to proceed. Then, select **Unblock this program** and click [**OK**].

You may also receive this message during the installation of Sage Service Host. Follow the same steps to proceed.

7 Repeat steps 1–6 for each workstation.

8 At the conclusion of the installation, you will be prompted to restart your computer.

9 Some of the data and report folders and files will be hidden by default. At the end of the installation, show hidden files and folders.

- On Windows XP Professional or Windows Server 2003, open Windows Explorer, select **Tools > Folder Options**, and select **View hidden files and folders** on the **View** tab.

- On Windows Vista, Windows 7, or Windows Server 2008, select **Organize > Folder and Search Options**, and then select **Show hidden files and folders** on the **View** tab.

10 If you set up a shortcut to Desktop, you must re-create it after installing 9.8. Select **Desktop.exe** in **C:\ProgramFiles\Timberline Office\Shared**. All other applications' shortcuts will continue to work after installing 9.8.

D. Other Installation Scenario

Peer Server Networks with Estimating Products

Follow installation steps A, B, and C, but perform this step after the installation:

At the peer server, map a drive to the same shared folder that the workstations use. Use this mapped drive to access Address Book data.

E. Modify Security Settings

If you use security, modify the security settings to meet your company's requirements (**Sage Desktop > Tools > Security Administration > Security Settings**). For more information, see the chapter on Security in the *User's Guide*.

F. Upgrade Data Files

If you upgraded to a new version of Accounting and Management Products, read and follow the information in this section. If this is a first-time installation of Accounting and Management Products, skip to "G. Install Crystal Reports XI (Optional)" on page 35.

NOTE: Service Management, Purchasing, and Inventory have specific upgrade requirements. First, remember to log on to the operating system as an administrator. Then, open and upgrade Service Management, Purchasing, and Inventory data files at the server the first time you open these applications. Upgrading this data on a workstation will incorrectly set DSNs and cause data access errors after the upgrade is completed.

Prepare to Upgrade Files

For optimal performance, we recommend that you upgrade your data from the server. If you prefer to upgrade your data from a workstation instead, you must install the software at both the server and the workstation before starting the **Upgrade Files** process.

1 Back up your data files.

2 Make sure no one is using Sage Timberline Office applications.

3 Log in to Sage Timberline Office as the application administrator.

4 Open TS-Main.

    a If you are prompted to select a company but you do not see your company, click [**Specify Folders**].

    b In the **Specify Data Folders Path** window, click [**Browse**]. Then, select the UNC path to the folder that contains your Sage Timberline Office data and click [**OK**].

    c Select your data folder from the **Specified Folders** area and click [**OK**].

    d Select your company from the list of companies in the **Select Company** window and click [**OK**].

5   If you use file locations and the path is not accessible from the server (for example, you use mapped drives instead of specific paths), modify the locations to point to files on the local hard drive of your server.

> **TIP:** We recommend that you convert your mapped drives to the equivalent UNC paths using the following instructions. If you convert now, you will not have to perform this step during future upgrades, and you can skip to .

   a   In TS-Main, select **File > Company Settings > File Locations**.

   b   In the **File Locations** window, look for network paths in the **Data Folder** column.

   c   If you have network paths, write them down. You need this information for a later step.

   d   In the **File Locations** window, modify each network path to point to the appropriate file on the local hard drive of your server.

   e   Close the **File Locations** window.

6   Repeat steps 4 and 5 for each data folder you will upgrade.

Upgrade Files

NOTE: You must upgrade Service Management, Purchasing, and Inventory at the server. Files cannot be used by other applications while they are being upgraded.

If you are upgrading from Sage Timberline Office 9.4.x, security changes will be made during upgrade as follows. See the chapter on security in the *User's Guide*.

In 9.4.x	Converted to the Following During Upgrade
Customer Operators	UserName_Role (for example, Karen_Role)
Operators	Users
Unlimited Operators	Both Security Administrator and Application Administrator roles
Groups	Roles
Mixed case alpha characters in passwords	Lowercase alpha characters in passwords

1 In TS-Main, select **Tools > Upgrade Files**.

NOTE: To save processing time, the **Upgrade Files** feature only updates files that have dictionary changes. You can, however, select the **Force file upgrades** check box (**TS-Main: Tools > Upgrade Files**) if you want to upgrade all of your data files.

2 Select to upgrade the current data folder or all data folders.

If you select **Current data folder**, you upgrade files in the data folder in which you currently work.

If you select **All data folders**, you upgrade files in all data folders that appear in the **Open Company** window. This may include data folders on other drives. With this option, the upgrade process can take a long time if you have many data folders.

3 Select files to upgrade from the **Files** list. You must upgrade all data files after you install 9.8.

4 Click [**Start**]. The **Print File Selection** window opens.

5 In the **File name** box, type a name for the upgrade report file and click [**Save**]. The upgrade process begins in the background.

6 Review the report when the process is complete.

Restore File Locations

If you modified file locations and the path is not accessible from the server (for example, you use mapped drives instead of UNC paths), restore the previous file location entries.

> **TIP:** If you use UNC paths or converted to UNC in step 5 on page 33, you can skip this step now and in future upgrades.

1 In TS-Main, select **File > Company Settings > File Locations**.

2 In the **File Locations** window, find the file locations you changed previously and change them back to the original network path.

3 Close the **File Locations** window.

G. Install Crystal Reports XI (Optional)

If you own Crystal Reports XI and have already installed it, you can skip this step. For more information about setting up Crystal Reports with Sage Timberline Office, see the *Users Guide*.

Crystal Reports XI is installed from three separate CDs. The first two CDs install the Crystal Reports XI software. The third CD installs a service pack. This service pack ensures Crystal Reports XI is compatible with Sage Timberline Office. Follow these steps to install Crystal Reports XI.

1 Ensure all Windows programs are closed. Insert the first CD into the drive of the server or workstation where your report designs are kept.

2 When the setup wizard appears, click [**Next**]. Follow the on-screen instructions to begin the installation.

3 Insert the second CD when prompted. Click [**OK**] to continue.

4 Click [**Finish**] after the Crystal Reports installation is finished and remove the second CD.

5 Insert the service pack CD into the drive. Open Windows Explorer and browse to the CD. Double-click **Setup.exe** to begin the service pack installation.

   NOTE: This step assumes you are installing Crystal Reports XI for Sage. If you are installing Crystal Reports XI from a CD supplied by another vendor, contact the manufacturer for instructions on applying the service pack update.

6 Follow the on-screen instructions to install the Crystal Reports service pack. Restart your computer when prompted.

   NOTE: Do not remove the CD; it must remain in your computer during restart for the installation to continue.

7 Remove the service pack CD after the installation is finished.

H. After You Install

Some of the data and report folders and files will be hidden by default. At the end of the installation, show hidden files and folders.

- On Windows XP Professional or Windows Server 2003, open Windows Explorer, select **Tools > Folder Options**, and select **View hidden files and folders** on the **View** tab.

- On Windows Vista, Windows 7, or Windows Server 2008, select **Organize > Folder and Search Options**, and then select **Show hidden files and folders** on the **View** tab.

Elevated Permission Levels After Installing

If you install Service Management (SM), Purchasing (PO), and Inventory (IV) on Windows Vista, Windows 7, or Windows Server 2008, you should elevate your permission level. Crystal Reports may not run correctly in these applications if the permission level is set too low. If you encounter an error message when starting SM, PO, or IV for the first time after installation, close the application, elevate your permission level, and start the application again. To do this:

1 Close the Pervasive Workgroup engine (Right-click the Pervasive Database icon in the systems tray and select **Stop Engines and Exit**.)

2 Right-click **SM.exe**, **PO.exe**, or **IV.exe**.

3 Select **Run as Administrator**.

4 Open each company data set at the server.

5 Repeat these steps for each company data folder.

If You Have Purchasing, Inventory or Service Management Data Inside Program Files

If, before upgrading, your company data folder was inside the **Program Files** folder in Purchasing (PO), Inventory (IV), or Service Management (SM), follow these steps at the server to move your data to a shared location and to make the data available to your users.

1 Move your data to a shared location. The default shared location is *[Server name]*\Timberline Office\Data.

2 At the server, remove all Pervasive System DSNs and User DSNs for each Sage Timberline Office installation.

   a Click [**Start**] > **All Programs > ODBC > 32bit ODBC Administrator**. The **ODBC Data Source Administrator** window appears.

   b From the **System DSN** tab, select the first **Name** associated with a **Pervasive ODBC Engine Interface Driver** and then click [**Remove**].

   c Repeat for each **Name** associated with a **Pervasive ODBC Engine Interface Driver**.

   d From the **User DSN** tab, select the first the first **Name** associated with a **Pervasive ODBC Client Interface Driver** and then click [**Remove**].

   e Repeat step d for each **Name** associated with a **Pervasive ODBC Client Interface Driver**.

   f Click [**OK**].

3 At the server, delete the **DBNAMES.CFG** file.

   a From *[Server name]*\WINDOWS, right-click **DBNAMES.CFG** and select **Delete**.

   b On the **Confirm File Delete** window, click [**Yes**].

4 Add each company to the company list.

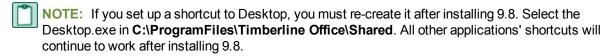   a In TS-Main, select **File > Open Company**.

   b Click [**Specify Folders**].

   c Click [**Browse**] to browse to the location that you selected in step 1.

   d Select a folder and click [**OK**].

   e At the server, open the SM and PO or IV applications for each Sage Timberline Office company. See Additional Steps for Network Installations That Have Accounting and Management Products in "D. Other Installation Scenario," on page 32.

   f Repeat for each company folder that you want to add.

5 If you use security, give the appropriate users rights to the companies (**Sage Desktop > Tools > Security Administration > User Setup > Companies**). For more information, see the section on security in the *User's Guide*.

If You Have Estimating-Only Workstations

To access Address Book, Job Cost, and tax data on a server, see Additional Steps for Network Installations That Have Accounting and Management Products in "D. Other Installation Scenario," on page 32. Workstations that have both Estimating Products and Accounting and Management Products have already been configured as part of the Accounting and Management Products installation and do not require these steps. The steps apply to both upgrades and first-time installations.

I. Final Steps

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

2 Review the following guidelines for custom reports or custom third-party applications.

   a If you have custom reports that use the Crystal Reports format, be sure to open these reports in Crystal Reports Professional. Select the **Database > Verify Database** command, and then save the report.

   b If you use Inventory, Purchasing, or Service Management custom Crystal reports, see the section on Crystal Reports in the User's Guide for special information and detailed instructions about upgrading these reports.

   c As with any release, database changes in Sage Timberline Office applications may affect your custom report designs or custom third-party applications. Contact your authorized business partner to discuss any issues relating to custom reports or third-party applications.

3 Sage Timberline Office provides numerous supporting documents in Adobe Acrobat (PDF) format. If you do not already have Acrobat Reader, you can download it from www.adobe.com.

4 To increase system performance, we have moved the location of the .exe files to the X://Program Files/Timberline Office/Shared folder. We have placed links in the Accounting folder so that shortcuts you may have in place will continue to work.

> **NOTE:** If you set up a shortcut to Desktop, you must re-create it after installing 9.8. Select the Desktop.exe in **C:\ProgramFiles\Timberline Office\Shared**. All other applications' shortcuts will continue to work after installing 9.8.

Chapter 4: Install Estimating

A. Before You Install or Upgrade

Read the *Release Notes* for more information regarding this release of Sage Timberline Office.

1 If you are upgrading, create a complete backup of all Sage Timberline Office data and program files.

2 If you use Accounting products, install Accounting 9.8 before Estimating 9.8.

3 Install the appropriate operating system service pack level, make sure that there is sufficient hard disk space available, and make sure that your server and workstations meet all other hardware and software requirements. For example, Estimating Products require up to 650 MB of available hard disk space. See "Chapter 2: System Requirements" on page 11 for more information.

4 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 Accounting and Management Products installed. For a list of the required folders, files, and registry keys for your operating system, see "Required Privilege Settings" on page 20.

5 Quit 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.

6 **Windows Vista, Windows 7, and Windows Server 2008:** You must elevate your permissions before installing Sage Timberline Office. During certain installation tasks, you will receive another prompt to elevate your privileges. If you do not acknowledge each prompt within two minutes, the installation process will quit the task. If this occurs, you will receive a separate prompt asking you to retry the task. To retry the task, click [**Retry**] and then elevate your privileges at the prompt.

7 If you are upgrading, use **Add or Remove Programs** to remove Estimating Products (if you have not already done so when installing Accounting and Management Products in the previous section).

8 If Sentinel protection devices are not already attached to your computer, delay attaching these devices until after you install Estimating. If you already have Sentinel protection devices attached, you can leave these devices in place during the Estimating installation.

9 Decide which installation instructions to read in this document. Most readers should start with "B. Install to a Workstation" on page 40. If you have Accounting and Management Products, a terminal server, or a peer network, start with "D. Other Installation Scenarios" on page 42.

10 Crystal Reports XI software is installed from three installation CDs. For more information, see "G. Install Crystal Reports XI (Optional)," on page 35

11 You can upgrade any Windows-based version of Estimating Products (beginning with version 1.0) to Estimating Products 9.8.
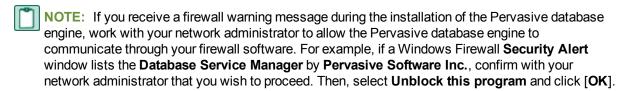
B. Install to a Workstation

IMPORTANT: Do not install Estimating Products until you have sufficient hard disk space available. See "Hard Disk Space Required for Installation" for more information.

NOTE: The installation process may restart your workstations several times.

1 At the workstation, log on with full administrative rights. Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives). If you are unsure whether you have full administrative rights, ask you network administrator for assistance. Alternately, you can ask your network administrator to log on with the network administrator ID before you start the installation.

2 Download the software. For details about the download, see Knowledgebase article KB980.

3 In the **Installation** window, click **Install Timberline Office software**. Follow the on-screen prompts to install Estimating Products and decide whether you want to install databases. You can install databases to your workstations, or you can install databases to a server. Install databases at your server if you want to share databases across your network.

NOTE: If you receive a firewall warning message during the installation of the Pervasive database engine, work with your network administrator to allow the Pervasive database engine to communicate through your firewall software. For example, if a Windows Firewall **Security Alert** window lists the **Database Service Manager** by **Pervasive Software Inc.**, confirm with your network administrator that you wish to proceed. Then, select **Unblock this program** and click [**OK**].

4 When the installation has completed, you will be prompted to restart your computer.

5 If you are upgrading from Estimating 9.5 or later, you can skip to step 7. After restarting, Estimating will automatically bring up the **Estimating User Account Control and Configuration Setup** window. This process sets up all default User Account Control (UAC) compliant folders, transfers all Windows registry settings, scans and copies any data found in Program Files, and copies relevant application data to a UAC-compliant location.

  - If this is the first time Estimating is being installed on your computer, this process ensures that your data will be stored in a UAC-compliant location and your computer is configured properly.

  - If you are upgrading from a previous version of Estimating, this process ensures any data stored in a non-UAC compliant location is copied to a UAC-compliant location.

  Select [**Click to Begin**] to start the upgrade process.

Windows Vista, Windows 7, and Windows Server 2008: You must elevate your permissions before installing Sage Timberline Office. During certain installation tasks, you will receive another prompt to elevate your privileges. If you do not acknowledge each prompt within two minutes, the installation process will quit the task. If this occurs, you will receive a separate prompt asking you to retry the task. To retry the task, click [**Retry**] and then elevate your privileges at the prompt.

NOTE: For more information on User Account Control, see the *User's Guide* or see the User Account Control topics included in Estimating Help.

6 Repeat steps 1–6 for each workstation to which you want to install Estimating Products.

7 At the conclusion of the installation, you will be prompted to restart your computer. After you restart your computer and log on with full administrative rights, wait until the message **All configuration tasks for Sage Timberline Office completed successfully**. Do not attempt to start any Sage Timberline Office applications until after you have received this message.

> **NOTE:** It may take awhile before you see the message **All configuration tasks for Sage Timberline Office completed successfully**.

8 If you set up a shortcut to Desktop, you must re-create it after installing 9.8. Select the Desktop.exe in **C:\ProgramFiles\Timberline Office\Shared** All other applications' shortcuts will continue to work after installing 9.8.

9 If you plan to install Estimating Products to a server or if you plan to share estimates and databases from a server, continue with "C. Install to a Server," on page 41. Otherwise, skip to "E. Set up Stand-Alone Security Devices" on page 44.

C. Install to a Server

> ✴ **IMPORTANT:** Do not install Estimating Products unless you have sufficient hard disk space available. See "Hard Disk Space Required for Installation" for more information.

> 📋 **NOTE:** The installation process may restart your server several times.

Many users choose to share databases and estimates across their network. They also install Estimating Products to their server so they can more efficiently perform file maintenance on their data. Follow these steps if you want to install Estimating Products or share databases or estimates from your server. Even if you do not install Estimating Products on your server, you still need to follow these steps to install required components that allow you to access data.

1 At the server or stand-alone computer, log on with full administrative rights. Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives). If you are unsure whether you have full administrative rights, ask you network administrator for assistance. Alternately, you can ask your network administrator to log on with the network administrator ID before you start the installation.

2 Download the software. For details about the download, see Knowledgebase article KB980.

3 If you want to install Estimating on the server, skip to step 6. Otherwise, if you want to access databases and estimates from the server, but you do not want to install Estimating, cancel the installation when the **License Agreement** window appears. Pervasive SQL Database Engine and SQL Server Express are automatically installed with the prerequisites.

   ▪ After you have canceled the installation, run the Sage System Verifier (SSV). This sets the Pervasive settings to the Sage Timberline Office recommended minimums. If Sage Timberline Office is installed, you can run the Sage System Verifier (SSV) from **Desktop > Tasks > Tools > System Verification**.

   ▪ Run SSV by browsing to and double-clicking **[...\980_Rev2_ Estimating\AdditionalInstalls\SSV\SageSystemVerifierSA.exe**.

4 In the **Installation** window, click **Install Timberline Office software**. In the resulting installation, choose to install databases, Estimating Products, or both databases and Estimating Products.

You can install Estimating to a server in order to perform file maintenance, but you should not perform other Estimating tasks at the server. These tasks should be performed at workstations.

NOTE: If you receive a firewall warning message during the installation of the Pervasive database engine, work with your network administrator to allow the Pervasive database engine to communicate through your firewall software. For example, if a **Windows Firewall Security Alert** window lists the Database Service Manager by Pervasive Software Inc., confirm with your network administrator that you wish to proceed. Then, select **Unblock this program** and click **[OK]**.

D. Other Installation Scenarios

Additional Steps for Network Installations That Have Accounting and Management Products

To access Address Book, Job Cost, and tax data on a server, follow these steps on each Estimating-only workstation. (Workstations that have both Estimating Products and Accounting and Management Products have already been configured as part of the Accounting and Management Products installation and do not require these steps.) The following steps apply to both upgrades and first-time installations.

1 For purposes of this installation, establish a connection (map a drive) to the shared **Timberline Office** folder on the server or peer server where the Accounting and Management Products data folder is installed. This shared folder should be the parent to the folder where the application data is installed.

  ▪ For Windows XP, Windows Server 2003, the path is [Drive]:\Documents and Settings\All Users\Application Data\Sage\Timberline Office.

  ▪ For Windows Vista and Windows Server 2008, the path is [Drive]:\ProgramData\Sage\Timberline Office.

  Map a drive to the **Timberline Office** shared folder.

  a In Windows Explorer, click **Tools > Map network drive**.

  b Select a letter for the drive name.

  c In the **Folder** box, browse to **[Server Name]\Timberline Office**.

  We strongly recommend mapping a drive to the location listed above. Mapping to a different folder can cause unexpected errors. In addition, when mapping a drive to the shared Timberline Office folder, do not disconnect or redirect existing mapped drives for Sage Timberline Office products to the new location. While we recommend the use of mapped drives to establish a connection with a server, you may also use a UNC path. For example, if you choose to use a UNC path to the shared data folder, the UNC path is *[Server name]*\Timberline Office\9.5\Accounting\WinInst\Install.exe.

2 Click [**Start**] **> Run**.

3 In the **Run** window, click [**Browse**]. In the **Browse** window, select **Install.exe** in the **Wininst** folder on the server.

  ▪ If you are using mapped drives, select X:\9.5\Accounting\WinInst\Install.exe, where X represents the drive mapped to the shared folder name in [step 1](#).

- Alternatively, if you are using UNC paths, select \\[Server name]\Timberline Office\9.5\Accounting\WinInst\Install.exe. Click [**Open**]. Then, click [**OK**].

4 In the **Installation** window, click **Install Timberline Office software** and follow the instructions as they appear in the windows.

> **NOTE:** If you receive a firewall warning message during the installation of the Pervasive database engine, work with your network administrator to allow the Pervasive database engine to communicate through your firewall software. For example, if a Windows Firewall **Security Alert** window lists the **Database Service Manager** by **Pervasive Software Inc.**, confirm with your network administrator that you wish to proceed. Then, select **Unblock this program** and click [**OK**].

> You may also receive this message during the installation of Sage Service Host. Follow the same steps to proceed.

5 Repeat steps 1–4 for each Estimating-only workstation. When finished, follow the steps in .

6 At the conclusion of the installation, you will be prompted to restart your computer. After you restart your computer and log on with full administrative rights, wait until the message All configuration tasks for Sage Timberline Office completed successfully. Do not attempt to start any Sage Timberline Office applications until after you have received this message. It may take awhile before you see the message **All configuration tasks for Sage Timberline Office completed successfully**.

7 Some of the data and report folders and files will be hidden by default. At the end of the installation, show hidden files and folders.

- On Windows XP Professional or Windows Server 2003, open Windows Explorer, select **Tools > Folder Options**, and select **View hidden files and folders** on the **View** tab.

- On Windows Vista or Windows Server 2008, select **Organize > Folder and Search Options**, and then select **Show hidden files and folders** on the **View** tab.

8 If you set up a shortcut to Desktop, you must re-create it after installing 9.8. Select the Desktop.exe in **C:\ProgramFiles\Timberline Office\Shared**. All other applications' shortcuts will continue to work after installing 9.8.

Terminal Server

Follow the installation steps for a Windows server, with these exceptions:

- Always use **Add or Remove Programs** to start an installation to a terminal server.

- If you install Sage Timberline Office on a Windows Server 2008 terminal server, begin the installation by selecting **Control Panel > Install Application on Terminal Server**. Follow the prompts and browse to the **install.exe** file.

  - In Windows Server 2008 R2, "terminal services" is called Remote "Desktop ".
    Open **Start > Control Panel > Install Application on Remote Desktop**
    or **Start > Control Panel > Programs > Install Application on Remote Desktop**.

    Follow the prompts and browse to the **install.exe** file.

> ■ If you use another server to host Estimating databases, install only Estimating applications to the terminal server.

NOTE: If you install Estimating Products on a terminal server that uses Windows Server 2003, you must log on to the terminal server with full administrative rights when you use Estimating Products. This ensures that Estimating Products have proper access to the Windows registry.

Pervasive Manual Installation

The Pervasive database engines are installed automatically with other prerequisite software when you install Sage Timberline Office products.

To manually install this program, download the software and install the prerequisites. Then, cancel the installation at the **License Agreement** window. Pervasive SQL Database Engine is automatically installed with the prerequisites.

After you have canceled the installation, you should run the Sage System Verifier (SSV), which will set Pervasive settings to the Sage Timberline Office recommended minimums.

If Sage Timberline Office is installed, you can run the Sage System Verifier (SSV) from **Desktop > Tasks > Tools > System Verification**.

If Sage Timberline Office is not installed, run SSV by browsing to and double-clicking **...\980_Rev2_ Estimating\AdditionalInstalls\SSV\SageSystemVerifierSA.exe**.

> **NOTE:** Some Sage System Verifier checks may not pass if Sage Timberline Office is not installed. This is acceptable provided that you ensure the **Sage Timberline Office—Pervasive PSQL License** and **Sage Timberline Office—Pervasive PSQL Settings** checks are completed successfully when you run the Sage System Verifier.

E. Set up Stand-Alone Security Devices

If you use License Manager to provide license security, skip to .

If you already use stand-alone security devices, skip to .

Install the Sentinel Driver

The Estimating installation program automatically installed a Sentinel driver if you did not have one. If you need instructions to install the Sentinel driver manually, open the Customer Portal at https://customers.sagenorthamerica.com/irj/portal/anonymous/login. Once you have logged on, in the **Knowledgebase Search** box, type "KB156918."

Attach Protection Devices to Workstations

1 If you have a parallel port protection device, disconnect any hardware or peripheral devices attached to the parallel port of a workstation.

2 Plug a protection device into the parallel port or USB port of the workstation.

3 If you disconnected devices in step 1, reconnect these devices.

4 Repeat steps 1–3 for each workstation. Then, skip to "G. Upgrade Estimates and Databases" on page 47.

F. Set up License Manager

If you use stand-alone security devices to provide license security, see "E. Set up Stand-Alone Security Devices" on page 44.

Guidelines

Please note the following:

- You must install License Manager to a Windows server or workstation.

- All license-managed servers and workstations must use the same network protocol (TCP/IP).

- You cannot install License Manager to a terminal server. If you have a terminal server, install to a workstation.

- If you use firewall software on your license server, you may not be able to use the WlmAdmin or WCommute applications to view or check out licenses. To resolve this issue, discuss the server's firewall security with your network administrator. If you are willing to adjust your firewall security settings on the license manager server, consider granting access to the **lservnt.exe** file.

- Check in any licenses before upgrading.

For more information about License Manager, see:

- *Getting Started With License Management*

- *Sentinel License Manager System Administrator Online Help* (index.html). This file is in the **...\980_ Rev2_Estimating\AdditionalInstalls\LicenseManager\SysAdminHelp.**

Install the Sentinel Driver

The Estimating installation program automatically installed a Sentinel driver if you did not have one. If you need instructions to install the Sentinel driver manually, see Knowledgebase article KB156918 .

Attach a Protection Device to the Computer That Will Have License Manager

1 If you have a parallel port protection device, disconnect any hardware or peripheral devices attached to the parallel port.

2 Plug the protection device into the parallel port or USB port.

3 If you disconnected devices in step 1, reconnect these devices.

Install License Manager

If you already have License Manager installed, skip to "Upgrade License Manager," on page 47.

1 Log on with full administrative rights. Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives). If you are unsure whether you have full administrative rights, ask you network administrator for assistance. Alternately, you can ask your network administrator to log on with the network administrator ID before you start the installation.

2 Open and double-click **...\980_Rev2_ Estimating\AdditionalInstalls\LicenseManager\Server\Setup\Setup.exe**.

3 Follow the on-screen prompts. The installation automatically installs the appropriate software for the operating system.

   NOTE: Be sure to accept the default installation path when you install License Manager. If you need to change the default installation path, change it to a local drive. You cannot install License Manager to a network drive.

Install License Codes

The number of network licenses purchased for an application indicates the total number of concurrent network uses allowed for that application. To install license codes, follow these steps:

1 Verify that the Sentinel License Manager service is running. Click **[Start]**. Then select **Settings > Control Panel > Administrative Tools > Services** (or **Start > Control Panel > System and Maintenance > Administrative Tools > Services** in Windows Vista). Look for **Sentinel RMS License Manager** in the list of services.

2 Open and double-click **...\980_Rev2_ Estimating\AdditionalInstalls\LicenseManager\Admin.net\Win32\WlmAdmin.exe**.

   NOTE: Consider copying the entire License Tools folder to your local hard drive. This makes License Tools more accessible for future maintenance.

3 Expand "Subnet Servers".

4 Install license codes using one of the following methods.

   ▪ **To enter license codes from a file:** In the **WlmAdmin** window, right-click your server and select **Add Feature > From a File > To Server and Its File**. In the **Open** window, select your license file and click [**Open**]. This installs all license codes in the file.

   ▪ **To type license codes:** In the **WlmAdmin** window, right-click your server and select **Add Feature > From a String > To a Server and its File**. In the **Add feature to server** window, type your license code exactly as it appears in the license file or on the packing slip. (The code is not case-sensitive.) Be sure to select the **Add feature to server's file** check box.

   When you enter a license code, the software adds this code to a file named **Lservrc** (which has no file extension) in the License manager installation path.

5 If you receive a message that a license is invalid or already exists, review the information in *Getting Started With License Management*

6 Enter license codes.

Upgrade License Manager

To upgrade License Manager, you must use the following steps to remove the previous version of License Manager and then install the new version (version 8.3). Perform these steps at the computer where License Manager is installed.

1 Check in any licenses before upgrading.

2 Run **LoadLS.exe**, located in the folder where you installed the previous version of License Manager (typically, C:\Program Files\Rainbow Technologies\SentinelLM7x.x.xServer\English). Click [**Remove**], and then click [**OK**] to remove the Sentinel LM license manager.

3 Remove the previous License Manager version (in XP: **Start** > **Settings** > **Control Panel** > **Add or Remove Programs**; in Windows Vista: **Start > Control Panel > Programs > Uninstall a Program**). Remove **Sentinel LM x.x.x.x. Server**.

4 Install the new version of License Manager. See "Install License Manager".

5 Copy the **Lservrc** file from the directory you identified in step 2 to the 8.1 directory of License Manager. Typically, the 8.1 directory is C:\Program Files\Common Files\SafeNetSentinel\Sentinel RMS License Manager\WinNT.

6 Click [**Start**] and then select **Settings > Control Panel > Administrative Tools > Services**. Find **Sentinel RMS License Manager** in the list of services, right-click the service, and then select [**Restart**].

G. Upgrade Estimates and Databases

If you upgraded to a new version of Estimating Products, read the information in this section. If this is a first-time installation of Estimating Products, skip to "H. After You Install" on page 48.

NOTE: If you manually create a backup, clear the check box to auto-create a backup.

1 If you access data on another computer, map a drive to the network shared folder in which you have data. Use the same drive letter for all workstations. To avoid network disruptions and to maximize performance, upgrade files at the computer that hosts your data.

2 Back up your data files.

3 In Estimating Tools, select **Upgrade Files**.

4 In the **Upgrade Files** window, select the **Upgrade - For current users of Estimating for Windows** option.

5 Select the folder containing the estimates or databases that you want to upgrade. Click [**Browse**] to browse for a folder.

6 Complete the remaining fields in the window.

7 Click [**Finish**] to upgrade the selected files. During the upgrade, a progress bar in the lower right corner of the **Estimating Tools** window shows the name and path of each file as well as the name of each

record type. Afterwards, you can print (**File > Print Audit**) or save (**File > Save Audit**) the information shown in the window.

8 If you are prompted to upgrade Address Book data, follow the steps in .

> **TIP:** Keep the following in mind if you are upgrading from an earlier version.

- If you are upgrading from a version earlier than 6.0, you must upgrade databases before you upgrade estimates. The update occurs automatically if the database and the estimates are in the same folder. If Estimating Tools cannot upgrade an estimate because it cannot find the associated database, use **File > File Tools** to move the estimate and database to the same folder; then, upgrade the single estimate. Click [**Yes**] when asked if you want to use the database that is in the same folder as the estimate.

- When you move a database to a different location, the estimates that were created must be re-associated with the database's new location.

H. After You Install

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

2 If you access data on another computer, map a drive to the network shared folder in which you have data. Use the same drive letter for all workstations. You may have already completed this step for one workstation when you upgraded files (). Be sure to complete this step for all Estimating workstations that access data on another computer.

3 If necessary, configure Estimating Products to access an Accounting and Management Products data folder. For instructions, 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.

4 If you upgraded and your Estimating data resided in the **Program Files** folder, your Estimating data was copied to a shared location. Verify proper operation of your files after upgrading, and then delete the original data in the **Program Files** folder. Update any workstation maps to point to the new shared location.

5 Sage Timberline Office provides numerous supporting documents 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.

I. Upgrade Your Estimating Explorer Data

If upgrading from 9.4.x, perform a back-up and restore operation to upgrade your existing Estimating Explorer data from MSDE to SQL Server Express.

Backup Estimating Explorer Version 2 Data

1 Have all users close Estimating.

2 Log on to the computer where you store your Estimating data.

3 Start Explorer on the computer where the data source resides.

4   Close any open data sources by selecting **Close Data Source** from the Estimating Explorer **File** menu.

5   From the **File** menu, select **Data Source Tools**. Click [**Next**] in the **Data Source Tools** window.

6   Select the name or address of the SQL Server where the data source you want to back up resides. If you do not see the server in the list, click [**Refresh**] to update the list of available servers or type the server's computer name; for example, [Server name] or [Server name]\instance.

7   Click [**Next**].

8   Select **Back up the Explorer data source** and click [**Next**].

9   Browse to the location of the folder where you want to create the backup. You must select a folder located on the computer that hosts the data source.

10 Click [**Start**]. If a backup copy already exists in the folder, Estimating Explorer warns you that the backup copy will be overwritten. If you get this warning, click [**OK**] to continue. Otherwise, click [**Cancel**].

11 When you finish working with the data source tools, click [**Finish**].

Restore Estimating Explorer Data

1   Close any open data sources by selecting **Close Data Source** from the **File** menu.

2   From the **File** menu, select **Data Source Tools**.

3   In the **Run As** window, select the user account to use with **Data Source Tools**. Note that the user account you select must be an administrator account on the local computer.

4   If you select **Current user**, clear the **Protect my computer and data from unauthorized program activity** check box.

5   Click [**OK**], and then click [**Next**] in the **Data Source Tools** window.

6   Select the name or address of the SQL server on the destination computer.

   If you do not see the server in the list, click [**Refresh**] to update the list of available servers or type the server's computer name. For example, type [Server name]\SQLEXPRESS for the default instance of SQL Server Express or [Server name]\instance for a named instance of SQL Server Express.

7   Click [**Next**]. Select **Restore an Explorer data source from a previous backup** and click [**Next**] again.

8   Click [**...**] to browse to the folder that contains the data source backup. Then, click [**Start**].

   If an Explorer data source already exists on the server, Explorer warns you that the existing data source will be overwritten.

9   To overwrite the existing data source, click [**OK**]. Otherwise, click [**Cancel**].

10 Click [**Finish**] to close **Data Source Tools**.

Chapter 5: Server Migration

The server and data migration tool allows you to easily transfer your Sage Timberline Office Accounting customizations and data to a new server. Items such as reports and the Reports menu, inquiries, formulas, macros, and custom fields can be moved. Company data, security settings and attachments can also be moved with the server migration tool. You can select which companies you want to move, giving you the flexibility to move all companies or only move selected companies.

> **TIP:** Click [**Help**] in any of the Server Migration windows for detailed instructions.

Things to Know Before you Begin

- You must first install Sage Timberline Office Accounting 9.8 on your new server to access the server migration tool. You will need your registration name and activation codes to access the tool.

- You can migrate data from Sage Timberline Office 9.6 or later.

- You must have administrative rights to the new server and a minimum of read permission to the old server.

- Ensure that your new server has enough disk space to hold the information from the old server.

- Most of the migration tasks are performed in a few minutes. However, moving attachments can take more time. If you have a large number of attachments, consider transferring them during non-business hours.

- Estimating and Document Management items are not included in the migration. The following Knowledgebase articles contain additional information:

    - Document Management - kb211550.

    - Estimating - kb146500.

    - Migration - kb241.

- We recommend that you perform a test migration, then validate that all of your data, reports, macros and settings work properly on the new server. You can then stop work on the old server and perform the migration again with the latest files.

- The migration will overwrite companies and security on the new server. You should perform the migration first, then set up companies and security (for example, if you start a new job).

- Set up existing or new printers on your new server. The TS PDF printer cannot be the only printer on your system and cannot be selected as the default.

- Macros must be in the Company folder on the old server prior to migration. You can copy the

macros to the Company folder, if necessary. If the macros are not in the Company folder, will need to recreate them on the new server after the migration.

Recommended Procedure

Prepare Your System

If you have not already installed and run Sage Timberline Office, do so now.

1. Install Sage Timberline Office Accounting 9.8 on your new server. See for assistance.

2. Click **Start > All Programs > Sage > Sage System Verifier 9.8**.

3. In the Sage System Verifier window, click [**Scan System**]. When the system verification has completed, click [**Close**].

4. Set up administrative rights on the new server.

Migrate Your Server

The following items are moved from the old server to the new server during this step:

- Security settings

- Companies

- Custom fields

- User formulas

- Reports - via UNC and mapped drives

- Macros - Printers

- Attachments - via UNC and mapped drives

1. On the new server, open **[Drive]:/Program Files/Timberline Office/Shared**. Double-click **Sage.STO.ServerMigrator.exe**. The **Server Migration Tool** window opens.

2. In the **Old server location** box, enter or browse to the location where Sage Timberline Office is installed on your "old" server. For example, \\servername\Timberline Office\9.5\Accounting\.

3. In the **Log file path** box, accept the default or enter the location on the new server and name for the server migration log; for example, \\servername\Timberline Office\9.5\Accounting\Migration\ServerMigrationLog1.pdf.
   You can refer to the log after you have completed the migration to ensure all files transferred correctly.

4. Click [**Validate**] to perform a test of the files to be transferred. **Validation complete** is displayed when this process has finished.

5. When validation is successful, click [**Migrate**]. **Migration complete** is displayed when this process has finished.

6. Refer to the server migration log you set up in Step 2 to ensure all files have transferred correctly.

Migrate Your Data Folders

1. If it is not already open on the new server, open [Drive]:/Program Files/Timberline Office/Shared. Double-click **Sage.STO.ServerDataMigrator.exe**. The **Server Data Migration Tool** window opens.

2. In the **Log file path** box, accept the default or enter the location on the new server and name for the data folder migration log; for example, \\servername\Timberline Office\9.5\Accounting\Migration\DataFolderMigration.pdf.
   You can refer to the log after you have completed the migration to ensure all files transferred correctly.

3. Select the companies you wish to move.

4. Click [**Validate**] to perform a test of the files to be transferred. **Validation complete** is displayed when this process has finished.

5. When validation is successful, click [**Migrate data folders**]. **Migration complete** is displayed when this process has finished.

6. Refer to the server data migration log you set up in Step 2 to ensure all files have transferred correctly.

Migrate Your Macros

Macros must be in the Company folder on the old server prior to migration. You can copy the macros to the Company folder, if necessary. If the macros are not in the Company folder, will need to recreate them on the new server after the migration.

1. If it is not already open on the new server, open [Drive]:/Program Files/Timberline Office/Shared. Double-click **Sage.STO.ServerDataMigrator.exe**. The **Server Data Migration Tool** window opens.

2. In the **Log file path** box, accept the default or enter or browse to the location on the new server and the name for the macro migration log, for example, \\servername\Timberline Office\9.5\Accounting\Migration\MacroMigration.pdf. You can refer to the log after you have completed the migration to ensure all files transferred correctly.

3. Select companies. Macros for the companies you choose will be transferred to the new server.

4. Click [**Migrate macros**].

5. In the **Macro Printers** window, click [**Change**] to select different printers. If you will use the same printers, no action is needed.

6. Click [**Migrate macros**]. **Macro migration complete** displays when this process is finished.

7. Refer to the macro migration log you set up in Step 2 to ensure all macros have transferred correctly.

Migrate Your Attachments

Migrating attachments can take some time. If you have a large number of attachments, you may want to consider moving them during non-business hours.

1. If it is not already open on the new server, open [Drive]:/Program Files/Timberline Office/Shared. Double-click Sage.STO.ServerDataMigrator.exe. The **Server Data Migration Tool** window opens.

2. In the **Log file path** box, accept the default or enter or browse to the location on the new server and the name for the attachment migration log, for example, \\servername\Timberline Office\9.5\Accounting\Migration\AttachmentMigration.pdf.
You can refer to the log after you have completed the migration to ensure all files transferred correctly.

3. Select companies if you have not already done so. Attachments for the companies you choose will be transferred to the new server.

4. Click [**Migrate attachments**].
Note: This step may take a long time, depending on the number of attachments in your system. When complete, the **Attachment Paths** window displays.

5. In the **Attachment Paths** window, review the old and new location for each set of attachments. Click [**Change**] to set up a new location or path for each line. If you want to change the location of more than one directory in the path, use the **Find and replace** link.

6. Select the rows for the attachment paths you want to transfer.

7. Click [**Migrate attachments**]. **Attachments migration complete** displays when this process is finished.

8. Refer to the attachment migration log you set up in Step 2 to ensure all attachments have transferred correctly.