

TIMBERLINE OFFICE

Get Started

Accounting and Management Products 9.1.3

Estimating Products 7.1.3

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03/05

Document Number: 32792.7 (TCTV#04)

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Section 1

Release Overview

Introduction

Thank you for choosing Timberline Office. With this release, you can conduct year-end processing with the latest 1098, 1099, W-2, and T4 tax forms.

Be sure to read supporting documentation before you install:

- This *Get Started* document contains an overview of the release, installation instructions, and system requirements.
- The *Important* document contains key late-breaking topics.
- The *Release Notes* describe new features, known issues, and fixes. This document is available on your CD in the Documents folder. *Release Notes* for earlier releases are available on your CD in the Documents\Archives folder.

These documents are current at the time of the release. To review support documentation published after the release, open www.timberline.com and click **Logon**. In the next window, on the left, click **Knowledgebase**. Follow the instructions to log on.

After you have logged on, type a question for a specific issue, or click **Release Update** at the top of the page for a list of key support topics.

Support for 8.x to End in 2005

We will not provide a year-end 8.x.x CD. If you have not yet updated your software from the 8.x.x CD to a 9.x.x CD, you should upgrade now to save time at year-end. If you need

help with this upgrade, contact your certified consultant or solution provider for assistance.

New Application

Timberline Office Desktop

(This change occurred in Estimating Products 7.1.0 and Accounting and Management Products 9.1.0.)

Desktop is the centerpiece of Timberline Office. From Desktop, you can open any Timberline application. You can also open Timberline tasks without opening their associated applications. For example, you can open the Correspondence Log task without opening Project Management.

In Desktop's **Favorites** pane, you can create links to the applications or tasks that you use the most. For example, you can create links to the Enter Invoices, Post Invoices, and Print Checks tasks. You can also create links to any Web page or third-party application.

Desktop's home pages show the status of your projects, properties, accounts, and estimates. You can choose from dozens of home pages that Timberline provides, or you can select a home page of your own design.

To start Desktop, select **[Start] > Programs > Timberline Office > Desktop**.

To learn more about Desktop, please see Desktop.pdf, available in the Documents folder on your CD.

New Features

Accounts Payable—1099 Update

1099 Mag Media output has been revised to conform with government-mandated changes.

Accounts Receivable—Aging Report Enhancements

(This change occurred in Accounting and Management Products 9.1.0.)

Accounts Receivable contains several aging report enhancements:

- New application function formulas prevent record overlines from printing on aging reports if there is no corresponding detail for that record.
- New retainage released transactions provide improved reporting for retainage.
- Aging reports now include retainage-only invoices.
- Aging reports now handle duplicate customer invoices.

Accounts Receivable—Agings and Statement Crystal Reports

(This change occurred in Accounting and Management Products 9.1.0.)

Accounts Receivable provides these new reports:

- Crystal aging reports for Customer, Customer Name, Contract, and Job.
- Crystal statement.

Accounts Receivable—Future Year Warning

(This change occurred in Accounting and Management Products 9.1.0.)

You now receive a warning if you use an accounting date that is more than one year beyond the year-end date in the **AR Settings** window (**File > Data Folder Settings > AR Settings**). This warning occurs in the **Enter Invoices** window (**Tasks > Enter Invoices**) and in the **Deposit Information** window (**Tasks > Enter Cash Receipts**).

Accounts Receivable—Write Off Retainage

(This change occurred in Accounting and Management Products 9.1.0.)

Accounts Receivable now allows you to write off retainage amounts for retainage billed invoices in Cash Receipts and enter write-off adjustments for retainage billed invoices in Adjust Receivables.

Billing—Retainage Percent to Bill

(This change occurred in Accounting and Management Products 9.1.0.)

Billing has a new, convenient method to bill retainage. In **Enter Worksheets**, you can now enter a retainage percentage to bill for the period. Use **Fill Down** on the shortcut menu in the **Retainage Percent to Bill This Period** column to assign a percentage to multiple contract items.

Billing—Accounting Date Option in Generate Invoices

(This change occurred in Accounting and Management Products 9.1.0.)

Billing has a new option that increases your flexibility when you generate invoices. In **Generate Invoices**, you are no longer limited to a WIP cut-off date when you generate cost-based invoices. You can now choose between an accounting cut-off date and a WIP cut-off date.

Contracts—Change Approved Contract Item Amounts

(This change occurred in Accounting and Management Products 9.1.0.)

If you have security permissions, you can now change approved contract item amounts without the inconvenience of having to unapprove the contract item. For more information, see the Contracts Help topic “Change approved contract item amounts.”

Crystal Reports 9

(This change occurred in Accounting and Management Products 9.1.0.)

Crystal reports in Timberline Office now use the Crystal Reports[®] 9 format. The Crystal Reports viewer that comes with Timberline Office reads reports that are based on Crystal Reports 9 as well as earlier versions of Crystal reports.

Notes About Custom Reports

- If you have custom reports that use the Crystal Reports format, be sure to open these reports in Crystal Reports Professional 9 or Timberline’s Crystal Reports 9, select the **Database > Verify Database** command, and then save the report. This optimizes report performance. For detailed instructions, please see *Crystal Reporting* (Crystal.pdf, available in the Documents folder of your CD).
- If you use Inventory, Purchasing, or Service Management custom Crystal reports, please see *Crystal Reporting* for special information about upgrading these reports.

- As with any release, database changes in Timberline applications may affect your custom report designs or custom third-party applications. Please contact your Timberline Office business partner (solution provider) or certified consultant to discuss any issues relating to custom reports or third-party applications.

Estimating—Database Item Sorting

(This change occurred in Estimating Products 7.1.0.)

In Estimating you can customize how you want items to sort when you perform takeoff or database maintenance. You can create up to four multiple-level sort orders that sort items by WBS code, group phase, phase, price code, job cost phase, or material class. For more information about setting up item sort orders refer to the “Setting up item sorting” Help topic (**Estimating > Help > Help Topics**).

Estimating—Multiple Item Labor Productivities and Material Prices

(This change occurred in Estimating Products 7.1.0.)

Estimating now supports multiple item labor productivities and material prices. New tables allow you to store values that Estimating can apply to labor and material costs for items in an estimate or database. In addition to the database item productivity and material price, you can enter up to ten (10) labor productivity tables and twenty (20) material price tables.

For example, you could use the tables to store different productivity factors for levels of difficulty; it may take 30 hours per thousand linear feet to run conduit at the ground level of a building, but to run the conduit on the 3rd floor it may take 45 hours per thousand linear feet. Or maybe your company uses different prices based on negotiated or competitive work. In that case you could setup two different tables for prices.

This feature is activated in Estimating (**Database > Database Settings**). After you turn it on and build your tables in the **Database Settings** window, you must add the values for the labor productivity factors and material prices or percentages in Database Editor. For more information refer to the “Multiple labor productivities and material prices in Estimating” Help topic in Estimating Help (**Estimating > Help > Help Topics**).

Estimating—New Search Capability for Item Lists

(This change occurred in Estimating Products 7.1.0.)

Now in an item list, you can search for items that meet specific criteria. In the new **Search** field, you can type a combination of full or partial words or special characters. Estimating finds all the items whose descriptions contain all the keywords entered. The more specific your criteria, the more focused your search results. For more information about searching for items refer to the “Searching a list” Help topic (**Estimating > Help > Help Topics**).

Payroll—W-2 Update

W-2 printed and Mag Media output has been revised to conform with government-mandated changes for year-end processing.

Pervasive.SQL V8 Database Engine

(This change occurred in Estimating Products 7.1.0 and Accounting and Management Products 9.1.0.)

The Accounting and Management Products 9.1.3 and Estimating Products 7.1.2 CDs use the Pervasive.SQL V8 database engine. With the new engine, you should notice that some Timberline reports open significantly faster.

Project Management—Change Management

(This change occurred in Accounting and Management Products 9.1.0.)

The new Project Management change management system is a simple, integrated, and efficient way to manage project changes. You can track vendor quotes, contract, and cost estimate changes through the entire change cycle. PJ change management allows you to:

- Record and produce pending change requests when they are first discovered (such as from an RFI).
- Set up default markups, add-ons, and tax descriptions to make data entry easier.
- Send cost estimate changes to Job Cost whenever you choose, without waiting for the "official" change order.
- Group approved change requests onto change orders and send approved contract changes to Job Cost and Contracts from one entry point.
- Route and track the distribution of change documents and related attachments using transmittals and Timberline's sending feature.

- Track due dates for vendor quotes and owner responses and produce dunning letters.
- Correct errors and apply revisions easily with the flexibility to unapprove changes or even edit them in an approved state.
- Produce professional AIA style forms and change documents with Crystal designs using the latest formats.

For more information, see the PJ Training Supplement at **Help > Documents > ProjectManagementChangeManagement.pdf**, and the following topics in **Help > Help Topics > Contents** under **Change Orders - Project Management**:

- About PJ change management
- Converting existing jobs to PJ change management
- Set up a job for PJ change management

Property Management—1098 and 1099 Updates

1098 and 1099 Mag Media output has been revised to conform with government-mandated changes.

Property Management—Cash Receipts and Import Payments

(This change occurred in Accounting and Management Products 9.1.0.)

Cash Receipts and Import Payments allow you to exempt a charge type from being automatically paid during cash receipts. Property Management also has improvements related to Cash Receipts, Change Lease, Import Payments, and Desktop.

Revised Installation

(This change occurred in Estimating Products 7.1.0 and Accounting and Management Products 9.1.0.)

The installation has been revised to be faster, more stable, and more informative. Messages now inform you if you are using an invalid operating system, an unsupported network protocol, or inadequate access permissions. Messages also notify you if you are installing a product that is incompatible with another Timberline Office product.

The installation now displays which third-party components are being installed and the progress of those installations. Finally, the installation requires fewer restarts.

Service Management—Dispatch Board Improvements

(This change occurred in Accounting and Management Products 9.1.0.)

You can now view the dispatch board based on scheduled time, create custom dispatch board views, and track miscellaneous time such as training and vacation. Additional enhancements to the dispatch board include:

- **Drag and Drop**—Use the drag and drop feature to move assignments and ECards between the new scheduled and priority views.
- **Miscellaneous Assignments**—Track non-work order time such as shop time, vacation, training, and medical appointments with a miscellaneous assignment on the dispatch board.
- **Named Views**—Set up custom, named views your dispatcher, service manager, and other office personnel can use to save them time when they open a dispatch board.
- **Resize ECards**—Resize ECards by clicking the bottom edge of the ECard and dragging it up or down and the estimated repair hours field updates automatically.
- **Dispatch Board Settings**—The **Dispatch Board Settings** now include a list of your named views and if you select multiple views at once, all of them will open simultaneously.
- **Scheduled View**—This is a new view of the dispatch board that displays ECards based on their scheduled times as opposed to timeslots.
- **Split an ECard**—Split an ECard by highlighting it; right-clicking; then selecting **Split ECard**. This divides the original ECard into two equal ECards by the scheduled time (useful when you need to schedule around an appointment or lunch hour).

Service Management—Interface with @Road® Mobile Resource Management

(This change occurred in Accounting and Management Products 9.1.0.)

You can now create an interface between the @Road Mobile Resource Management system and Service Management. If you subscribe to the @Road service, you can share Service Management information such as employees, service locations, and work orders

with the @Road service for Global Positioning System (GPS). The interface lets you track, via the internet, your employees' vehicles and positions in relation to service sites. It also lets you monitor important work order information such as status and department. Note: Timberline provides an activation code to owners of this feature.

Other

Support Policy for Custom Reports and Custom Third-Party Applications

As with any release, database changes in Timberline applications may affect your custom report designs or custom third-party applications. Please contact your Timberline Office business partner (solution provider) or certified consultant to discuss any issues relating to custom reports or third-party applications.

Purchasing and Inventory Applications CD

(This change occurred in Accounting and Management Products 9.1.0.)

All content from the Purchasing and Inventory Applications CD has been moved to other CDs. Purchasing and Inventory are part of the Accounting and Management Products 9.1.0 CD. Mobile Purchasing, Mobile Inventory, Procurement TRA-SER® Integrator, barcode fonts, and sample files are part of the Training Data Sets 9.1.0 CD.

Supported Operating Systems

(This change occurred in Estimating Products 7.1.0 and Accounting and Management Products 9.1.0)

Timberline supports Microsoft® Windows® 2000 Professional, Windows 2000 Server, Windows 2000 Advanced Server, Windows XP Professional, Windows Server 2003 Standard Edition, Windows Server 2003 Enterprise Edition, and Windows Small Business Server 2003. Timberline discontinued support for Windows 98 SE, Windows Me, and Windows NT® beginning with the Accounting and Management Products 9.1.0 CD, Estimating Products 7.1.0 CD, and Residential Management Application 9.1.1 CD.

Timberline also supports Novell® NetWare® 4.2 and 5.1, but will discontinue this support for all software released after December 31, 2004.

You can read "Software Notice 04-S," dated April 9, 2004, which provides more information on this issue. To read this notice, open www.timberline.com and click **Logon**. In the next window, on the left, click **Knowledgebase**. Follow the instructions to log on. In the **Search for a solution section**, type [Notice 04-S](#). In the **Document library** section, select **Software Alert/Notice**. Click [**Submit**].

Additional Electronic Documentation

The *Technical System Reference* provides detailed information about system issues. This document, which replaces parts of the *Resource and Installation Guide*, is available on your CD in the Documents folder.

Support

Technical Support Knowledgebase

The Knowledgebase is an online source to get answers to your Timberline application issues. To access the Knowledgebase, open www.timberline.com and click **Logon**. In the next window, on the left, click **Knowledgebase**. Follow the instructions to log on.

After you have logged on, type a question for a specific issue, or click **Release Update** at the top of the page for a list of key support topics.

Contact Information

U.S. or Canada

Call 1-800-551-8307, fax 503-439-5333, or e-mail support@timberline.com
Support hours: Monday through Friday 6 a.m. to 5 p.m. PT (Pacific time)

Australia

Acctg/Mgmt: 1800-120-369, fax +503-439-5763, e-mail austracct@timberline.com
Estimating: 1800-120-369, fax +503-439-5333, e-mail austrest@timberline.com
Support hours: Monday through Friday 8 a.m. to 5 p.m. AET (Australian Eastern time)

Asia-Pacific

Acctg/Mgmt: +503-439-5178, fax +503-439-5763, e-mail austracct@timberline.com

Estimating: +503-439-5178, fax +503-439-5333, e-mail austrest@timberline.com

Support hours: Monday through Friday 8 a.m. to 5 p.m. AET (Australian Eastern time)

Other International Areas

Call +503-439-7155, fax +503-439-5333, or e-mail support@timberline.com

Support hours: Monday through Friday 6 a.m. to 5 p.m. PT (Pacific time)

Section 2

Install Accounting and Management Products

Installation Changes

If you are familiar with Accounting and Management Products 8.x.x installations, review the bullets below to see changes that began with the 9.1.0 release. If you are a first-time installer of accounting and management products, please skip to [“Compatible CDs” on page 14](#).

- The installation prevents you from installing to a computer that uses Microsoft® Windows® 98 SE, Windows Me, or Windows NT®. This is in accordance with Timberline’s discontinuation of support for these operating systems.
- Service Management customers who upgrade from 8.x.x or earlier: This release replaces Paging Services with Service Messaging, which is part of Service Management’s new Communication Center. If you own Paging Services, the upgrade program automatically adds an activation code for Service Messaging but fails to add an activation code for Communication Center. To activate Service Messaging, you must manually enter an activation code for Communication Center. Retrieve this code from Gold Online (<http://www.timberline.com/login/gold/logon.asp>). At this Web page, select the Company Information tab; then select the Activation Data tab. You can also retrieve codes from the voice response unit at 800-848-4173.
- Timberline Office now uses the Pervasive.SQL® V8 database engine, which offers improved performance. Do not delete this engine from your Windows startup folder. In earlier releases, Timberline Office used the Pervasive database engine differently, and you could delete the engine from the startup folder to save memory. The new engine must remain in the startup folder to ensure proper initialization and improved performance.

- Purchasing and Inventory applications are now part of the Accounting and Management Products 9.1.3 CD. To install these applications, run <CD-ROM drive letter>:\Install.exe (the same program that you would run to install other accounting and management products).
- Due to a space limitation of the Accounting and Management Products CD, Mobile Purchasing and Mobile Inventory are now part of the Training Data Sets 9.1.0 or 9.1.3 CD. To install these applications, run:
 - <CD-ROM drive letter>:\Main\tools\POIV\Mobile Applications\Mobile_PO\Setup.exe
 - <CD-ROM drive letter>:\Main\tools\POIV\Mobile Applications\Mobile_IV\Setup.exe
- In earlier releases, the installation had an **Install prerequisite software** step. This step has been incorporated into the **Install Timberline Office software** step. You can still manually install prerequisite software from subfolders of D:\Prerequisites, though.
- Previously, during the installation to a network workstation, you could choose whether to install system files (.exe and .dll files). Now, Timberline Office always installs these files to the workstation.

Compatible CDs

- Accounting and Management Products 9.1.3 CD
- Estimating Products 7.1.2 CD
- Residential Management Application 9.1.1 CD
- Training Data Sets 9.1.3 CD

IMPORTANT: If you install both an Accounting and Management Products CD and an Estimating Products CD, install the Accounting and Management Products CD first. Also, be sure to install the compatible versions listed above. Do not install incompatible versions (for example, do not install Estimating Products 6.7.2 and Accounting and Management Products 9.1.3).

Supported CD Upgrade Paths

Upgrade From	Upgrade Path
7.5.0–8.x.x	Upgrade directly to 9.1.3.
7.0.0–7.4.0	Upgrade to 7.5.x or 7.6.x; then upgrade to 9.1.3.
5.4.x or earlier	<ol style="list-style-type: none"> 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 9.1.3.

A. Before You Install

- 1 If you are upgrading, back up all Timberline Office program and data files.
- 2 Quit all programs and services for the duration of the installation. This includes programs that may be running in the background such as antivirus, e-mail, and backup programs.
- 3 Decide which installation instructions to read in this document. Most readers should start with [“B. Install to a Server or Stand-Alone Computer” on page 15](#). If you have a Novell network, terminal server, or peer network, please start with [“D. Other Installation Scenarios” on page 17](#).

B. Install to a Server or Stand-Alone Computer

- 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. You can also ask your network administrator to log on with the network administrator ID before you start the installation.
- 2 Insert the Accounting and Management Products CD into the CD-ROM drive of the server or stand-alone computer.

- 3 If the **Installation** window does not open, click **[Start] > Run**. In the **Run** window, click in the **Open** box and type D:\Install.exe (D:\ represents your CD-ROM drive). Click **[OK]**.
- 4 In the **Installation** window, click **Install Timberline Office software**. Follow the instructions in the installation windows. This step may require you to restart your server or stand-alone computer.



NOTE: If you receive the message **Pervasive.SQL V8 (SP1) is already installed. Do you want to reinstall the same version?** please click **[Yes]**.



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 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]**.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 15](#)), follow these steps to set up your workstations.

- 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 your network administrator for assistance. You can also ask your network administrator to log on with the network administrator ID before you start the installation.
- 2 Map a drive to the network shared folder on the server or peer server where you installed accounting and management products. This shared folder should be a parent to the folder where you installed Timberline Office. For example, if you installed to C:\TSApps\Timberline Office, you should map a drive to the shared folder TSApps.



NOTE: The shared location mentioned above is not the same as a folder that Timberline Office installs called “Shared.”

- 3 Click **[Start] > Run**.

4 In the **Run** window, click [**Browse**]. In the **Browse** window, select **Install.exe** in the Wininst folder on the server. For example, select **T:\Timberline Office\Accounting\Wininst\Install.exe** (T:\ represents a drive mapped to the shared folder name in which you installed accounting and management products). Click [**Open**]; then click [**OK**].

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

If you have estimating products on the workstation, a message will appear that asks you to remove estimating products 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 [“Section 3” on page 23](#) to upgrade estimating products.



NOTE: If you receive the message **Pervasive.SQL V8 (SP1) is already installed. Do you want to reinstall the same version?** please click [**Yes**].



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**].

6 Repeat steps 1–5 for each workstation.

D. Other Installation Scenarios

Read the sections below that apply to your installation scenario.

Peer Server Networks That Also Have 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.

Novell Server

Follow installation steps A, B, and C, with these exceptions:

- Install to the server from a workstation. Make sure that you have a drive mapped to the Sys volume of the Novell server.
- Be sure to click the **Install Software for a Novell Server** step before you select the **Install Timberline Office** step in the **Installation** window.



NOTE: You must have Novell Client 4.9 (SP1) for the **Install Software for a Novell Server** step to appear.

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 your terminal server does not host Timberline Office programs and data files:
 - Install to the server as though it were a workstation. Perform the steps in [“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 \[OK\].C. Install to a Workstation Connected to a Network” on page 16.](#)
 - After you install Timberline Office, verify that the Pervasive.SQL database service on the terminal server uses an account that has the access rights of the **Local System** account plus access to all 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 the **Use this account** button. Work with your network administrator to enter an account that has the access rights of the **Local System** account plus access to all Timberline Office program and data files.



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 3119 error, which states “No authentication context is available.”

E. Upgrade Data Files

If you upgraded to a new version of accounting and management products, read the information in this section. If this is a first-time installation of accounting and management products, skip to [“F. After You Install” on page 21](#).

Prepare to Upgrade Files

The following instructions assume that you upgrade data files at your server. Timberline strongly recommends this method because it avoids network irregularities that can disrupt the upgrade.



NOTE: If you upgrade accounting and management product data files and estimating product data files, be sure to upgrade accounting and management product data files first.

- 1 Back up your data files.
- 2 Make sure that no one is using Timberline Office applications.
- 3 Open TS-Main.
 - a If you are prompted to select a data folder, but you do not see your data folder, click [**Change Drives**].
 - b In the **Change Drives** window, click [**None**], and select the drive that contains your Timberline data. Click [**OK**].
 - c Select your data folder, then click [**OK**].
 - d If you still cannot see your data folder after you change drives, click [**Specify Folders**]. In the **Specify Data Folder Paths** window, click [**Browse**]. In the **Browse for Folder** window, select a data folder; then click [**OK**]. Finally, click [**OK**] in the **Specify Data Folder Paths** window.
- 4 If you use file locations, modify the locations to point to files on the local hard drive of your server.
 - a In TS-Main, select **File > Data Folder Settings > File Locations**.
 - b In the **File Locations** window, look for network paths in the **Data Folder** box.
 - 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.
- 5 Repeat steps 3 and 4 for each data folder that you will upgrade.

Upgrade Files

- 1 In TS-Main, select **Tools > Upgrade Files**.
- 2 Select to upgrade either 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 display in the **Open Data Folder** 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. Please review the table below to determine which files require an upgrade.

Upgrade From	Applications That Require Data Upgrades
9.1.0 with Service Pack 1	General Ledger and either Purchasing or Inventory (When you open Purchasing or Inventory, you will be prompted to upgrade data. This process upgrades data for both Purchasing and Inventory.)
9.1.0	General Ledger
8.3.4 and earlier	All accounting and management applications

- 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, restore the previous file location entries.

- 1 In TS-Main, select **File > Data Folder Settings > File Locations**.
- 2 In the **File Locations** window, find the file locations that you changed previously, and change them back to the original network path.
- 3 Close the **File Locations** window.



NOTE: You can select to automatically upgrade files when you install the software. Files cannot be used by other applications while they are being upgraded.

F. After You Install

If You Have Estimating-Only Workstations

To access Address Book, Job Cost, and tax data on a server, follow the steps below for 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 product installation).

- 1 Map a drive to the network shared location on the server or peer server where you installed Timberline accounting and management products. This shared folder should be a parent to the folder where you installed Timberline Office. For example, if you installed to C:\TSApps\Timberline Office, you should map a drive to the shared folder TSApps. The mapped drive would appear as T:\Timberline Office.



NOTE: The shared location mentioned above is not the same as a folder that Timberline Office installs called "Shared."

- 2 Click [**Start**] > **Run**.
- 3 In the **Run** window, click [**Browse**]. Select the path to Wininst\Install.exe on the server (for example, T:\Timberline Office\Accounting\Wininst\Install.exe, if T:\ is the drive that you mapped in step 1). 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.
- 5 Repeat steps 1–4 for each Estimating-only workstation.

Final Steps

- 1 Please restart all programs and services that you shut down for the installation.
- 2 Please review these guidelines about custom reports or custom third-party applications:
 - If you have custom reports that use the Crystal Reports format, be sure to open these reports in Crystal Reports Professional 9 or Timberline's Crystal Reports 9, select the **Database > Verify Database** command, and then save the report. This optimizes report performance. For detailed instructions, please see *Crystal Reporting* (Crystal.pdf, available in the Documents folder of your CD).
 - If you use Inventory, Purchasing, or Service Management custom Crystal reports, please see *Crystal Reporting* for special information about upgrading these reports. For detailed instructions, please see *Crystal Reporting* (Crystal.pdf, available in the Documents folder of your CD).
 - As with any release, database changes in Timberline applications may affect your custom report designs or custom third-party applications. Please contact your Timberline Office business partner (solution provider) or certified consultant to discuss any issues relating to custom reports or third-party applications.
- 3 Timberline provides numerous supporting documents in Adobe® Acrobat (pdf) format. If you do not already have Adobe Acrobat or Acrobat Reader, you should install Acrobat Reader by starting the program D:\AdditionalInstalls\Adobe\ar500enu.exe on your Accounting and Management Products CD (D:\ represents your CD-ROM drive).

Section 3

Install Estimating Products

Installation Changes

If you are familiar with Estimating Product 6.7.x installations, review the bullets below to see changes that began with the the 7.1.0 release. If you are a first-time installer of estimating products, please skip to [“Compatible CDs” on page 24](#).

- The installation prevents you from installing to a computer that uses Microsoft Windows 98 SE, Windows Me, or Windows NT. This is in accordance with Timberline’s discontinuation of support for these operating systems.
- Timberline Office now uses the Pervasive.SQL V8 database engine, which offers improved performance. Do not delete this engine from your Windows startup folder. In earlier releases, Timberline Office used the Pervasive database engine differently, and you could delete the engine from the startup folder to save memory. The new engine must remain in the startup folder to ensure proper initialization and improved performance.
- In earlier releases, the installation had a step called **Install prerequisite software**. This step has been incorporated into the installation of Timberline Office applications, and the installation step is now called **Install Timberline Office software**. You can still manually install prerequisite software from subfolders of D:\Prerequisites (D:\ represents your CD-ROM drive).
- Cut and Fill is now part of the main estimating products installation. You no longer need to install Cut and Fill separately.
- The estimating products installation automatically installs a Sentinel driver if you do not have one. Previously, you had to manually install the Sentinel driver.

Compatible CDs

The following CDs are compatible:

- Accounting and Management Products 9.1.3 CD
- Estimating Products 7.1.2 CD
- Residential Management Application 9.1.1 CD
- Training Data Sets 9.1.3 CD

IMPORTANT: If you install both an Accounting and Management Products CD and an Estimating Products CD, install the Accounting and Management Products CD first. Also, be sure to install the compatible CDs listed above. Do not install incompatible products (for example, do not install Estimating Products 6.7.2 and Accounting and Management Products 9.1.3).

Supported CD Upgrade Paths

You can upgrade any Windows-based version of Estimating Products (beginning with the 1.0 CD) to the Estimating Products 7.1.0 CD.

A. Before You Install or Upgrade

- 1** Do you have accounting and management products? If so, you must install these products before you install estimating products.
- 2** If you are upgrading, back up all Timberline Office program and data files; then use Add or Remove Programs to remove estimating products (if you have not already done so as a result of installing accounting and management products in the previous section).
- 3** Quit all programs and services for the duration of the installation. This includes programs that may be running in the background such as antivirus programs.
- 4** If you do not have Sentinel protection devices 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.

- 5 Decide which installation instructions to read in this document. Most readers should start with [“B. Install to a Workstation” on page 25](#). If you have accounting and management products, a Novell network, a terminal server, or a peer network, please start with [“D. Other Installation Scenarios” on page 27](#).

B. Install to a Workstation

- 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 your network administrator for assistance. You can also ask your network administrator to log on with the network administrator ID before you start the installation.
- 2 Insert the Estimating Products CD into the CD-ROM drive of the workstation.
- 3 If the **Installation** window does not open, click **[Start] > Run**. In the **Run** window, click in the **Open** box and type [D:\Install.exe](#) (D:\ represents your CD-ROM drive). Click **[OK]**.
- 4 In the **Installation** window, click **Install Timberline Office software**. In the resulting installation, install estimating products, and decide whether you want to install databases. You can install databases to your workstation, or you can install databases to a server. Install databases to your server if you want to share databases across your network.



NOTE: If you receive the message **Pervasive.SQL V8 (SP1) is already installed. Do you want to reinstall the same version?** please click **[Yes]**.



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]**.

- 5 Repeat steps 1–4 for each workstation to which you want to install estimating products.
- 6 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 26](#), otherwise skip to [“E. Set Up Stand-Alone Security Devices” on page 28](#).

C. Install to a Server

Many operators choose to share databases and estimates across their network. They also install estimating products to their server so that 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 at your server, you still need to follow these steps to install required components that allow you to access data.

- 1 At the server, 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. You can also ask your network administrator to log on with the network administrator ID before you start the installation.
- 2 Insert the Estimating Products CD into the CD-ROM drive of the server.
- 3 If you see the **Installation** window, skip to step 4. Otherwise, click [**Start**] > **Run**. In the **Run** window, type D:\Install.exe (D:\ represents your CD-ROM drive). Click [**OK**].
- 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 the message **Pervasive.SQL V8 (SP1) is already installed. Do you want to reinstall the same version?** please click [**Yes**].



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

IMPORTANT: You must install accounting and management products before you install estimating products.

To access Address Book, Job Cost, and tax data on a server, follow the steps below for 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 product installation). The steps below apply to both upgrades and first-time installations.

- 1 Map a drive to the network shared location on the server or peer server where you installed Timberline accounting and management products. This shared folder should be a parent to the folder where you installed Timberline Office. For example, if you installed to C:\TSApps\Timberline Office, you should map a drive to the shared folder TSApps. The mapped drive would appear as T:\Timberline Office.



NOTE: The shared location mentioned above is not the same as a folder that Timberline Office installs called "Shared."

- 2 Click [**Start**] > **Run**.
- 3 In the Run window, click [**Browse**]. Select the path to Wininst\Install.exe on the server (for example, T:\Timberline Office\Accounting\Wininst\Install.exe, if T:\ is the drive that you mapped in step 1). 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.
- 5 Repeat steps 1–4 for each Estimating-only workstation. When finished, follow the steps in [“B. Install to a Workstation” on page 25](#).

Novell Server

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

- Install to the server from a workstation. Make sure that you have a drive mapped to the Sys volume of the Novell server.

- Before you insert the Estimating Products CD into your CD-ROM drive, click [**Start**] > **Run**. In the **Run** window, click in the **Open** box and type D:\Prerequisites\Tspvinst\Setup.exe -nw (D:\ represents your CD-ROM drive). Be sure to include a space before "-nw." Click [**OK**]. Follow the instructions in the windows to install the Pervasive database engine for Novell servers.

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 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.

E. Set Up Stand-Alone Security Devices

If you use License Manager to provide license security, please skip to [“F. Set Up License Manager” on page 29](#).

If you already use stand-alone security devices, skip to [“G. Upgrade Estimates and Databases” on page 32](#).

Install the Sentinel Driver

The Estimating installation program automatically installed a Sentinel driver if you did not have one. If you need instructions to manually install the Sentinel driver, open www.timberline.com and click **Logon**. In the next window, on the left, click **Knowledgebase**. Follow the instructions to log on. In the **Search for a solution** section, type How do I install the Sentinel driver?. Click **Submit**.

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. If you use a USB protection device and are prompted to browse to an .inf file, browse to D:\AdditionalInstalls\LicenseManager\Setup\Driver\WIN_NT\1386\SNTNLUSB.INF (D:\ represents your CD-ROM drive).
- 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 32.](#)

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 28.](#)

Guidelines

Please note the following:

- The Estimating Products 7.1.2 CD contains Sentinel LM 7.2.0.13 Server software. This version corrects multiple issues with previous versions of LM Server.
- You must install License Manager to a Windows server or workstation.
- All license-managed machines must use the same network protocol (TCP/IP or IPX/SPX).
- You cannot install License Manager to a terminal server, Novell server, or server that uses Windows Server 2003. If you have one of these servers, install to a workstation instead.
- 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.

For more information about License Manager, see:

- *Getting Started With License Management* (LicenseManagementGettingStarted.pdf). This file is in the Documents folder of your Estimating Products CD.

- *Sentinel License Manager System Administrator's Guide* (SLM71sys.pdf). This file is in the AdditionalInstalls\LicenseManager\RainbowSysAdminGuide folder of your Estimating Products CD.

Install the Sentinel Driver

The Estimating installation program automatically installed a Sentinel driver if you did not have one. If you need instructions to manually install the Sentinel driver, open www.timberline.com and click **Logon**. In the next window, on the left, click **Knowledgebase**. Follow the instructions to log on. In the **Search for a solution** section, type How do I install the Sentinel driver?. Click **Submit**.

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, start with [“Upgrade License Manager” on page 32](#).

- 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 your network administrator for assistance. You can also ask your network administrator to log on with the network administrator ID before you start the installation.
- 2 Click [**Start**] > **Run**. In the **Run** window, click [**Browse**]. In the **Browse** window, select D:\AdditionalInstalls\LicenseManager\Server\Setup\Setup.exe (D:\ represents your CD-ROM drive).
- 3 Click [**Open**]; then click [**OK**] to start the installation.

- 4 Follow the on-screen prompts. The installation automatically installs the appropriate software for the operating system.
- 5 Restart the computer.



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**. Look for **SentinelLM** in the list of services.
- 2 Insert the Estimating Products CD into the CD-ROM drive of the License Manager server.
- 3 Click [**Start**] > **Run**. In the **Run** window, click in the **Open** box and type D:\AdditionalInstalls\License Manager\Admin_net\WlmAdmin.exe (D:\ represents your CD-ROM drive). Click [**OK**].



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

- 4 Install license codes using one of the methods described below.
 - To type license codes: In the **WlmAdmin** window, right-click your server and select **Add Feature > From a String**. 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.
 - To enter license codes from a file: In the **WlmAdmin** window, 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.

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. The default path is C:\Program Files\Rainbow Technologies\SentinelLM 7.x.x Server\English (C:\ represents your hard drive).

- 5 If you receive a message that a license is invalid or already exists, review the information in *LicenseManagementGettingStarted.pdf*. This file is in the documents folder of your Estimating Products CD.
- 6 After you enter license codes, remove the CD and store it in a safe place.

Upgrade License Manager

To upgrade License Manager, remove the previous version of License Manager and then install the new version (version 7.2.0.13):

- 1 Check in all commuter licenses to the server.
- 2 Locate the license manager service. Click [**Start**]; then select **Settings > Control Panel > Administrative Tools > Services**. Look for **SentinelLM** in the list of services.
- 3 Right-click the service and select [**Stop**].
- 4 Use Add or Remove Programs to remove License Manager.
- 5 In Windows Explorer, delete the folder C:\Program Files\Rainbow Technologies\SentinelLM 7.x.x Server.
- 6 Install the new version of License Manager. See [“Install License Manager” on page 30](#).

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 33](#).



NOTE: If you upgrade accounting and management product data files and estimating product data files, be sure to upgrade accounting and management product data files first. To learn how to upgrade accounting and management product data files, see [“E. Upgrade Data Files” on page 19](#).

- 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, try to 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** radio button.
- 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 on the screen.
- 8 If you are prompted to upgrade Address Book data, follow the steps in [“E. Upgrade Data Files” on page 19](#).

Tips

- You must convert databases before you convert estimates. This happens automatically if the database and estimate are in the same folder.
- Do not move a database from the location it was in when you created estimates. The original, folder relationship between a database and estimate should be maintained (see the next bullet for handling the case when the folder relationship is broken).
- If Estimating Tools cannot upgrade an estimate because it cannot find the associated database, use File Tools (**File** menu) to move the estimate and database to the same folder; then upgrade that single estimate. Answer **Yes** when asked if you want to use the database that is in the same folder as the estimate.

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 ([“G. Upgrade Estimates and Databases” on page 32](#)). 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** Timberline provides numerous supporting documents in Adobe® Acrobat (pdf) format. If you do not already have Adobe Acrobat or Acrobat Reader, you should install Acrobat Reader by starting the program D:\AdditionalInstalls\Adobe\ar500enu.exe on your Estimating Products CD (D:\ represents your CD-ROM drive).

Section 4

System Requirements

The hardware and software requirements below provide a guideline. For more detailed information, please contact your Timberline business partner or sales representative.

Supported Operating Systems

- Microsoft Windows Server 2003 Enterprise Edition
- Windows Server 2003 Standard Edition
- Windows Small Business Server 2003
- Windows 2000 Advanced Server
- Windows 2000 Server
- Windows 2000 Professional
- Windows XP Professional
- Novell® NetWare® 4.2 with Service Pack 9
- NetWare 5.1
- Palm OS® 4.0, 4.1, 5.2-5.2.1 (Mobile Estimating, Mobile Purchasing, and Mobile Inventory)
- Palm OS 3.1-3.53 (Mobile Purchasing and Mobile Inventory also support these operating systems)



NOTE: Residential Management does not support NetWare. Database Editor does not support Windows terminal services or NetWare. Timberline does not support License Manager with Windows Server 2003.

Processor

- 800 MHz PC

RAM

- 512 MB RAM for Windows Server 2003 and Windows 2000 Server (all supported editions)
- 256 MB RAM for Windows 2000 Professional and Windows XP Professional
- 8 MB RAM for Mobile Purchasing and Mobile Inventory, 2 MB for Mobile Estimating (handheld device RAM)

Hard Disk Space

- Accounting and management products on a server or stand-alone computer: 600 MB available disk space plus 25 MB per accounting and management application¹
- Accounting and management products on a workstation: 295 MB available disk space (this assumes that a server hosts accounting and management data)¹
- Estimating products on a server, workstation, or stand-alone computer: 260 MB available disk space¹
- Residential Management on a server, workstation, or stand-alone computer: 580 MB

¹Add up to 400 MB for required third-party components, which Timberline Office installs as necessary.

Other Requirements—General

- CD-ROM drive
- Crystal Reports® Professional or Timberline's Crystal Reports (Required to modify or create Crystal Reports designs)

- High-quality network interface card
- Sound card
- SVGA monitor (800 x 600 pixels, 1024 x 768 pixels recommended for Project Management and Database Editor)
- Microsoft Internet Explorer 6.0 (Service Pack 1)
- Microsoft Outlook® (required to use e-mail features)
- Printer
- WinFax Pro 10.0, 10.01, or 10.03 (required to send faxes in applications with this feature)

Other Requirements—Estimating Only

Digitizers

- 32-bit WinTAB digitizer driver software (supplied by your digitizer manufacturer)
- Digitizing tablet connected to RS-232 serial port configured as COM1 or COM2

Sentinel Protection Device

Timberline supports Sentinel SuperPro protection devices.

Estimating products automatically install the Sentinel system driver if one is not already installed. To manually install this driver, run

D:\AdditionalInstalls\SentinelDrivers\Sentinel System Driver 5.42.0 (32-bit).msi (D:\ represents your CD-ROM drive). You can also download the driver from www.rainbow.com.

Supported Protocols

- TCP/IP Transmission Control Protocol/Internet Protocol. Microsoft servers default to this protocol.

- IPX/SPX (Internetwork Packet Exchange/Sequenced Packet Exchange. Novell protocol that is the standard in NetWare 4.x.)
- RDP 5 Remote Display Protocol. Microsoft remote protocol, which is used in its remote connection applications.
- ICA Independent Computing Architecture. Citrix remote protocol, which is used in its remote connection application.