SAGE TIMBERLINE OFFICE

Get Started

Accounting and Management Products 9.2.0
Estimating Products 9.2.0

sage software

NOTICE

Visit our Web site at www.sagetimberlineoffice.com, or call 1-800-330-7163 to learn about training classes that are added throughout the year.

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Contents

Get Started

Section 1
Release Overview

Introduction

Thank you for choosing Sage Timberline Office. This release contains improvements to existing applications. 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, database changes, 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.sagetimberlineoffice.com and click **Logon**.

Sage Software

In order to better align with our global parent company, Best Software is becoming Sage Software. While our name is changing, our commitment to being 100% customer-focused remains the same. You will find the Sage Timberline Office applications on the **Start** menu, under **Start > All Programs > Sage Software > Sage Timberline Office**.

Sage Information Center

The Sage Information Center delivers a variety of live news and announcements, such as new features, overviews for both new and existing products, company changes, and updates to conferences. The updates occur real-time on your desktop through your Internet connection.

Support for 8.x.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 business partner for assistance.

Version Change

The version number for Estimating has jumped from 7.1.3 to 9.2.0, so it corresponds to rest of the Sage Timberline Office applications. There were no interim Estimating releases between the 7.1.3 and 9.2.0 CDs.

New Features

Accounts Payable—Quick Checks

In this version of Accounts Payable, you can record an invoice and print a check from one place. This timesaving feature is useful for such situations as when a vendor comes into the office for a payment, when you need to make a quick COD payment, or when you just need to cut a check for Payroll-related liabilities. In addition, the Accounts Payable functionality has been improved as part of this quick checks feature.

This new feature is easy to use and find. The menu title of **Record Manual Checks** is now **Record Manual/Print Quick Checks** (**Tasks > Record Manual/Print Quick Checks**).

Accounts Payable—Record Manual/Print Quick Checks

The Record Manual Checks function includes transaction-wrapping capability. This functionality protects data integrity due to interruptions or aborts. For more information on transaction wrapping, see the “Transaction rollback” topic in TS Main Help.

The Check Detail report (AP Record Manual/Print Quick Checks journal) and Check Summary reports have been enhanced. You will see a summarize section on the reports and, if there are no totals to display, the Totals section will not appear on the journal.

Titles for check boxes in **Check Settings** have been modified (**File > Data Folder Settings > AP Settings > [Check Settings]**). The check box title **Record Manual Checks updates Last Check number** is now **Manual check updates Last Check number**. For quick checks, the check box **Quick check updates Last Check number** has been added.

Accounts Receivable—Aging Reports

The Crystal designs of the Accounts Receivable aging reports use new formulas that significantly improve processing time. The new formulas are:

- tsarCustomerDetailWithRetainage
- tsarJobOnlyDetail
- tsarJobCustomerDetail
- tsarContractOnlyDetail
- tsarContractCustomerDetail

Billing—Contract-Based Invoices

Options on the **Tasks** menu have changed. The **Enter Worksheets** task is now **Contract-Based Invoices**.

You can do most of the workflow for contract-based billing from within the **Contract-Based Invoices** task. Use this task to generate, preview, and then print draft or final copies of your contract-based invoice.

It is no longer necessary to generate invoices for contract-based invoices, as these automatically generate during the **Contract-Based Invoices** task. The **Generate Invoices** task is now **Generate Cost-Based Invoices** and applies to cost-based billing only.

Synchronization between the contract and the invoice occurs automatically. Billing compares the contract amounts, customer, invoice format, billing contact, and billing type each time you select an invoice from within the **Contract-Based Invoices** task. If it finds differences, it displays a message and allows you to synchronize the contract and invoice. It is no longer necessary to delete a worksheet and recreate it in order to update the billing invoice with changes made to the contract.

You can approve an invoice from within the **Contract-Based Invoices** task. Task security allows increased control over who can approve and print a final invoice.

You can use the **Send** function to send a contract-based invoice for approval or payment.

The Enter Worksheets journal has been replaced with a Contract-Based Invoices journal. The change is automatic and requires no action on your part. However, if you previously used a customized journal and want to revert to that design, you can change it in **BL Settings** (**File** > **Data Folder Settings** > **BL Settings** > **Journals/Forms**).

NOTE: To work properly, your custom design must use the **BL - Invoice** record as the primary record.

Billing—Quick Bill for Contract-Based Jobs

You can use the **Quick Bill Invoices** task to bill a contract job. A new setting in **BL Settings** activates this feature. Use it to bill items that relate to the job but are not part of the approved contract amounts. For example, use this to do a charge-back billing to an original subcontractor to pay for rework done by a second contractor.

Buyout—Sort Options on Quote Sheets and Purchase Orders

Previous versions of Buyout sorted quote sheets and purchase orders in alphabetical order by material class description. With this release, you can set up a sorting method for both quote sheets and purchase orders in the **Work File Information** window. This window is found under **Actions > Work File Information**.

Buyout—Quote List

The **Quote List** window is resizable, which allows you to see longer descriptions. This window opens when you click the [**List Quotes**] button.

Buyout—Work File Performance

Processing has been improved and updating a work file will be much quicker than previous versions.

Cash Management—Residential Management Transaction Records

Cash Management accepts accounting dates on transactions records for deposit transactions coming from Residential Management.

Crystal Reports 10

Crystal reports in Sage Timberline Office now use the Crystal Reports 10 format. For information about using Crystal reports, see *Crystal Reporting*. (Crystal.pdf is available on your CD in the **Documents** folder.)

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 10 or Sage Timberline's Crystal Reports 10, select the **Database > Verify Database** command, and then save the report. This optimizes report performance. For detailed instructions, please see *Crystal Reporting*.
- 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 Sage Timberline applications may affect your custom report designs or custom third-party applications. Please contact your Sage Timberline Office business partner or certified consultant to discuss any issues relating to custom reports or third-party applications.

- Crystal Reports 10 installs to a new location, X:\Program Files\Common Files\Crystal Decisions\2.0\Bin (X:\ represents your computer's system drive). The new location lets multiple versions of Crystal Reports run on the same computer. If you save a report in Crystal Reports 10, you cannot open the report in earlier versions.

Database Editor—Lists and Filters

You can scroll through a layout's drop-down list and a filter's list in the grid of an open item or phase and the layouts and filters do not apply to the grid.

Estimating—Export To Excel

In Estimating, you can export any report to an Excel (.xls) file where you can perform custom analysis. The report looks the same in Excel as it does in Estimating and maintains all of the formatting, colors, fonts, and layout. The report prints in three Excel worksheets: the cover page, the main body of the report, and the totals page.

Estimating—Named Report Layouts Default

This feature allows you to save a report's settings, such as Allocate Addons, Rounding, Item Sorts, and Summarization. In addition, it allows you to give that group of settings a name. When printing the report, select the layout name to apply those settings.

You can create and manage numerous named layouts for each report type in the **Report Options** window. To apply a named layout, select a name from the **Report Layout** drop-down list. To create a new layout, change the report's settings, click the [**Save Layout**] button, and then type a new name. Click [**Manage Layouts**] to rename and delete existing layouts.

If you have used Estimating before, you will notice the **Report Layout** drop-down list contains one layout called **#Existing Layout**. This is the default report layout created with the **[Save as Default]** button in your previous version of Estimating. You can rename **#Existing Layout** or delete it.

Estimating—Totals Window

- **Dockable Totals Window—**You can dock the **Totals** window, which allows you to view and modify totals information while you work in an estimate. You can dock the **Totals** window horizontally (on the top or bottom) or vertically (on the right or left) in the **Estimating** window. In addition, you can adjust the size of the **Totals** window. To dock the window, click **[Dock]** in the upper-right corner of the **Totals** window to select a docking position from the menu.

- **Grand Total Display**—The grand total and cost per unit (if you have entered a job size) appear in the status bar of the estimate and increment as you work. Right-click the status bar to select the option to view or hide the grand total and cost per unit.
- **Totals Page Formatting and Templates—**You can adjust the formatting for rows, cells, and columns in the **Totals** window to include font, color, shading, and the ability to hide areas from view on printed reports. In addition, you can arrange add-ons, subtotals, and category rows in any order. Once you have set up a **Totals** window the way you want, you can save the page as a template to be used again with other estimates.
- **Totals Page Notes—**The notes feature has been added to the **Totals** window. This allows you to include notes specific to the **Totals** window as a whole. You have the option to print the notes with reports in the **Report Options** window.
- **Add-ons Flexibility**—It is easier to control how you want to work with add-ons in the **Totals** window. You can drag and drop add-ons once they are placed in the window, and you can designate an add-on as one you can allocate by selecting the **Allocatable** check box. A new hover tip is available so you can view information about add-ons, such as how they are calculated or whether they are dependent on other add-ons.
- **Add-ons to Allocate during Reporting—**You can designate which add-ons you must allocate directly in the **Totals** window, without editing the add-on. Select the **Allocate Addons** check box in the **Report Options** window.
- **Press [Esc] Exits Totals**—You can press the **[Esc]** key on your keyboard to exit the **Totals** window. In previous versions, you could click **[Cancel]** or **[OK]** to exit, but the **[Esc]** key did not function to exit Totals.

Estimating—Show Decimal Places in the Totals Window

You have the ability to show pennies in category, add-on, and total amounts in the **Totals** window. To show pennies, open the **Totals** window, right-click a column header, and select **Format Column**.

Estimating—Reports

The following reports and report functions have been updated:

- **Print Reports from Multiple Folders**—You can select estimates from different folders to print comparison and variance reports.
- **Resize Variance Report Setup Window**—You can resize the **Select Estimates for Variance Report** window, so you can easily see the information in this window.
- **Print Headers and Footers**—This feature was enhanced to allow the header to print on all pages except the cover page.
- **Print Comparison and Variance Reports When Estimates Are in Different Folders**—You can browse to different folders to select estimates to use for comparison or variance reports.
- **Exporting Reports**—When you export Estimating reports to .pdf, .tsv, .csv, .xls, or .txt, the file name prefills with the name of the estimate.

Estimating—Recalculate Option

You can select the option to not show a message when the estimate recalculates. This option is available under **Edit > Options > Spreadsheet**.

Estimating—Reset Don’t Ask Messages

You can click the [**Reset Don’t Ask Messages**] button found under **Edit > Options > Miscellaneous** to select all the check boxes for messages to appear.

Estimating—Totals

The totals and grand totals appear on the estimate in the status bar.

Estimating—USB Device Driver

Estimating's Sentinel device driver has been upgraded to version 7.1.0. It supports USB devices and installs both the parallel and USB drivers automatically.

Estimating—Copy and Paste in Excel

When you copy and paste a row from an estimate spreadsheet into an Excel worksheet, the columns maintain properly aligned headers.

Estimating Explorer Version 2—Architecture and User Interface

The architecture of Estimating Explorer has been improved in the follow areas:

- Open database architecture using Microsoft® SQL Server™ (MSDE)
- Scalable for workgroups that produce large volume of estimates
- Improved messaging interface with Sage Timberline Estimating
- Integration with Microsoft® Outlook® Calendar
- Integration with Sage Timberline Address Book
- Flexible platform for easier customization and future development
- Better support for Citrix environments
- Clean, web-like user interface that is easy to use.

Estimating Explorer Version 2—Archives Module

With the **Archives Module**, you can:

- Scan archive files (*.zip and *.tszip) and *.tszip2.
- Create *.tszip archives.
- Archive multiple files at the same time.
- Create an archive that contains multiple estimates and designate a master estimate display and reporting purposes.
- Configure the **Archives** list to display column values for any of the **Estimate Info**, **Job Classifications**, **Events**, or **File Properties** fields. There are more than 80 fields from which to choose.
- View the **Spreadsheet sequences** of an archived estimate and export the data to Excel.
- Add any kind of file to an archive, such as *.doc, *.xls, and *.ppt.

- Extract and delete files from an archive without restoring the archive.

Estimating Explorer Version 2—Estimate Management

With the new file management features, you can:

- Batch move, copy, delete, and archive multiple files at the same time.
- Drag and drop estimate files from one folder to another.
- Rename, refresh, and recalculate estimate files.
- Send deleted files to the **Recycle Bin** as a *.tszip.
- Create and edit estimates using an improved user interface without launching Estimating.
- View and work with your hidden files.
- View the spreadsheet sequences of an estimate and export the data directly to Excel.
- Configure the **Estimates** list to display column values for any of the **Estimate Info**, **Job Classifications**, **Events, or File Properties** fields. There are more than 80 fields from which to choose.
- Export estimate events to Microsoft® Outlook®.
- View and manage your legacy estimates and generate reports based on your legacy estimate data without upgrading the estimate files to your current Estimating version.

Estimating Explorer Version 2—Folder Management

With the new folder management features, you can:

- Create a new folder.
- Rename a folder.
- Refresh a folder.
- Use Window's **Explorer** to open a folder.
- Manage the **New Estimate Defaults** of folders and subfolders in one place.

Estimating Explorer Version 2—Preferences Module

With the improvements to application preferences, you can:

- Specify both user and global application settings.
- Import **Job Classification** labels from a selected Sage Timberline database.
- Scrub the values for **Project**, **Estimator**, **Bidders**, **Events**, **Units**, and **Status** and write the changes to the estimate files.

Estimating Explorer Version 2—Reports Module

With the improvements to reports, you can:

- Create unlimited user-definable named and saved reports.
- Use the much improved report filtering and report options to maximize your report types.
- View the bid performance of your company and your competitors.

Estimating Explorer Version 2—Search Module

Explorer's greatly improved search capabilities allow you to:

- Search for documents by any value in an estimate's information or a file's properties. There are 51 estimate information fields, 16 job classification fields, 10 file properties fields and, in total, more than 80 searchable fields.
- Move, copy, delete, archive, edit, open, and rename files from a search result.
- Configure the search results columns to display values for any of the **Estimate Info**, **Job Classifications**, **Events, or File Properties** fields. There are more than 80 fields from which to choose.

Estimating Explorer Version 2—Migration

Explorer makes migration from Estimating Explorer easy. When you initialize the Explorer data source, you can choose to import your Estimating data and application settings directly from the Estimating Explorer database (pex.mdb). If you are new to Address Book, Explorer can migrate your Estimating Explorer contacts directly into the Address Book associated with your Sage Timberline database.

File Tools—Folder and Subfolder Selection

Sage Timberline Office File Tools has a new face and the ability to back up the entire company data folder, including Purchasing, Inventory, and Service Management data. For more details on how to back up your company data folder, see the File Tools Help topic “Backing up files.” You must exit the Purchasing and Inventory applications before using the Sage Timberline Office File Tools to back up or restore the company folder.

- You can back up multiple folders and subfolders in a single File Tools back up operation. In the previous File Tools application, you could not include subfolders in File Tools operations. This feature allows you to back up databases and estimates in one step.
- You can use File tools to back up multiple databases and estimate directories in a single backup operation.
- Because you can select folders and subfolders, files such as printout files (files with a .prn extension) that are stored in separate folders will be included when you back up the data set.

File Tools—Error Checking

File Tools offers more error checking during operation processing.

- Checks for in-use files
- Notifies you of any files that will be overwritten
- Validates that selected files are complete files
- Verifies the available space requirement for an operation

File Tools—Save and Reuse File Sets

You can save folder and file lists from one File Tools session and later open the saved file set to reuse.

File Tools—Journal

At the end of a File Tools session, you have the opportunity to print a File Tools journal or save the journal to a file.

Government Reporting

In Accounts Payable and Property Management, you can select a check box for magnetic media prior year reporting.

Help

- **Project Management**—Online Help has been added for the new Commitment Change Order feature.
- **Property Management**—Online Help has been improved and updated in several areas of Property Management, mainly in Manage Leases and Change Entries.
- **Purchasing**—The ability to view a list of Purchasing users to verify the system administrator has been re-added to the **Help** menu (**Help > Users**).
- **Service Management—**Help has been updated in a number of areas, including the **Filters** view, the **Freight Product** field, the **Products** tab in **SM Settings**, default payment method information, the **5 Week Schedule**, the **DBoard**, and Import Trade Services Pricing. In addition, you will find new PageRunner topics in the table of contents (**How to** > **Set up PageRunner**).

Inventory—Batch Information in Enter Stock Issues

When you enter stock issues (**Tasks > Enter Stock Issue**) and you add a new batch name and date, the **Batch Detail** window automatically opens so you can directly enter the batch detail information. When you entered a new batch in previous years, the batch listed in the window and you had to select and open the new batch before you could enter information.

Inventory—New Data Sets

When you open Inventory and you open a new data set, the process is consistent with the way you open new data sets in other Accounting applications.

Job Cost—Dictionary

You can update the **Job Tax Group** on the **Job** record using Open Database Connectivity (ODBC).

License Manager

Included in this release of the software is a new version of License Manager, version 7.3.0.2. This version is compatible with the supported Windows 2003 server™ editions.

You can check out a license using the WCommute utility for a period of 180 days.

This version also addresses the issue of commuter licenses occasionally not queuing back to the license server.

For additional information regarding the new version of License Manager, see the *Getting Started with License Manager* guide.

If you are using an older Sentinel SuperPro hardware key and you have been experiencing issues (for example, you cannot obtain a license, your license is being dropped, or you have issues checking out a commuter license), please contact Sage Timberline Support. See "Support" on page 32 for contact information.

Model Estimating—Models Drop-Down Lists

Models includes the ability to create drop-down lists. This enables you to limit a model user's input to a specific list of choices. Making this list of choices available for selection helps to reduce errors, such as mistyping information or entering values outside the range of accepted values. Some of the main features include the following:

- You can add a drop-down list to a model in the **Model** window (**Database > Models)** when you select a new drop-down list question type. Use the **Properties** window for the question to set up the choices in the drop-down list.
- Once a drop-down list is set up, operators who use that model can select values from the list in the **Create Interview** window (**Takeoff > Model Takeoff**).

Model Estimating—Copy Interview

You can click [**Copy Interview**] with a model selected in the **Model Takeoff** window to copy your answers and selections from one pass through a model to create a second pass quickly. Then you can modify your second pass without answering every question again.

Model Estimating—Add Pass and Add Assembly in Context Menus

The menu items **Add Pass** and **Add Assembly** have been added to the context menu within assembly and item lines in the **Model Interview** window. This allows you to make multiple passes easily through an assembly and to add an assembly by a specific assembly number. To access the context menu, right-click an assembly or item line, and then select **Add Pass** or **Add Assembly**.

Payroll—Check Forms

The **Modify Check Forms** task has been updated to provide more flexibility when using check formats. Now, there are three types of check formats:

Standard—This is the original, or existing, form that contains six YTD buckets. It has not changed from previous versions. You can print duplicate stubs with the **Standard** form.

Short stub—This form introduces up to 15 current and YTD earnings and deduction items and the duplicate stub feature.

Extended stub—This form allows for up to 30 current and YTD earnings and deduction items. The duplicate stub feature is not available with the **Extended** form.

In addition, you can choose to control the earnings and deduction items that print on the check stub and whether taxes appear on the check stub. Alternately, you can print automatically the earnings and employee paid taxes and deductions that appear on the check.

Payroll—Check Form Reports

The following check form reports are available but have not been added to the menu:

- PR Check Format Detail for Deducts Taxes and Fringes.rpt
- PR Check Format Detail for Earnings.rpt

Payroll—Print Masked Account Number on Direct Deposit Notification

In order to help prevent identity theft, you have the option to print the employee's masked account number on the direct deposit notification. If you choose this option, only the last four characters of the employee's bank account number will be printed. To use this option, select the **Print masked account number on direct deposit notification** check box in the **Modify Check Forms** window.

Payroll—Print Masked Social Security Number

In a continued effort to help prevent identity theft, the print social security number option has been modified. By selecting the new **Print masked soc sec number** check box in the **Modify Check Forms** window, you can still print the employee's social security number on the check or direct deposit stub. However, the first five numbers of the social security number will be masked with Xs. For example, the social security number 123-45-6789 will print as XXX-XX-6789.

Payroll—Print Preview in GL Recap and Quarterly Forms

The **Print Preview** feature is available in the GL Recap report.

Payroll (Australia)—Cheque Forms

The **Modify Cheque Form** task has been updated to provide more flexibility when using cheque formats. Now, there are three types of cheque formats:

Standard—This form is the original or existing form that contains six YTD buckets. It has not changed from previous versions. You can print duplicate slips with the **Standard** form.

Short slip—This form introduces up to 15 current and YTD earnings and deduction items and the duplicate slip feature.

Extended slip—This form allows for up to 30 current and YTD earnings and deduction items. The duplicate slip feature is not available with the **Extended** form.

In addition, you can choose to control the earnings and deduction items that print on the cheque slip and whether taxes appear on the cheque slip. Alternately, you can print automatically the earnings and employee paid taxes and deductions that appear on the cheque.

Payroll (Australia)—Cheque Form Reports

The following cheque form reports are available but have not been added to the menu:

- PR Cheque Format Detail for Deducts Taxes and Fringes.rpt
- PR Cheque Format Detail for Earnings.rpt

Payroll (Australia)—Print Masked Account Number on Direct Deposit Notification

For security purposes, you can print the employee's masked account number on the face of the direct deposit notification by selecting the **Print masked account number on direct deposit notification** check box in the **Modify Cheque Forms** window. The last four characters of the employee’s bank account number are printed.

Payroll (Australia)—Print Masked Tax File Number

For security purposes, you can select the **Print masked tax file number** check box in the **Modify Cheque Forms** window to print the employee's tax file number on the cheque or direct deposit slip with all but the last three digits of the tax file number masked with Xs. For example, the tax file number 123-456-789 prints as XXX-XXX-789. You must print a masked tax file number or no tax file number at all.

Payroll (Canada)—Cheque Forms

The **Modify Cheque Form** task has been updated to provide more flexibility when using cheque formats. Now, there are three types of cheque formats:

Standard—This form is the original or existing form that contains six YTD buckets. It has not changed from previous versions. You can print duplicate stubs with the **Standard** form.

Short stub—This form introduces up to 15 current and YTD earnings and deduction items and the duplicate stub feature.

Extended stub—This form allows for up to 30 current and YTD earnings and deduction items. The duplicate stub feature is not available with the **Extended** form.

In addition, you can choose to control the earnings and deduction items that print on the cheque stub and whether taxes appear on the cheque stub. Alternately, you can print automatically the earnings and employee paid taxes and deductions that appear on the cheque.

Payroll (Canada)—Cheque Form Reports

The following cheque form reports are available but have not been added to the menu:

- PR Cheque Format Detail for Deducts Taxes and Fringes.rpt
- PR Cheque Format Detail for Earnings.rpt

Payroll (Canada)—Print Masked Social Insurance Number

For security purposes, you can select the **Print masked soc ins number** check box in the **Modify Cheque Forms** window to print the employee's social insurance number on the cheque form with all but the last three digits of the social insurance number masked with Xs. For example, the social insurance number 123-456-789 prints as XXX-XXX-789. You must print a masked social insurance number or no social insurance number at all.

Project Management—Commitment Change Orders

Project Management contains a new Commitment Change Order **(Contract Control > Commitment COs)** feature you can use to view commitment history, process pending and approved changes to commitments, and print commitment change order documents. Integrated with change management and commitments, you can link and prefill information from change requests and commitment items.

Project Management—Commitment Change Order Column in Details View

You can add commitment change order columns to the detail view of Change Request and Change Order inquiries.

Project Management—Commitment Change Order Numbers on Reports

Commitment Change Order numbers have been added to the following reports:

- CR Log-Full Detail (CR) (**Reports > Change Request**)
- CR Log-Internal Detail (CR) (**Reports > Change Request**)

- CO Log with Detail (CR) (**Reports** > **Change Order**)
- Change Order Release Log (CR) (**Reports** > **Change Order**)

Project Management—Inquiries

The following inquiries have been added to the **Inquiry** menu:

- Commitment CO Log (**Inquiry** > **Change Order**)
- CCOs not signed (**Inquiry** > **Change Order**)
- CCOs not released (**Inquiry** > **Change Order**)
- CCOs released, commit not revised (**Inquiry** > **Change Order**)
- Unassigned CCOs (**Inquiry** > **Change Order**)
- Subcontract CO Log (**Inquiry** > **Subcontract**)
- PO CO Log (**Inquiry** > **Purchase Order**)

Project Management—Purchase Order Reports

The following reports have been added to the **Reports** menu under **Purchase Order**:

- Purchase Order CO Form 1 (CR)
- Purchase Order CO Form 2 (CR)

The following report has been added as the default **Purchase Order CO** report on the **Change Management** tab (**File** > **Data Folder Settings** > **PJ Settings)**.

- PJ Purchase Order CO Form 1 (T) (CR)

If you prefer, you can use PJ Purchase Order CO Form 2 (T) (CR) as the default Purchase Order CO report instead.

Project Management—Commitment Change Orders on Reports

The following reports include information from the new Project Management commitment change orders:

- Commitment Change Order Log (**Reports** > **Change Order**)

- PO Change Order Log (**Reports > Purchase Order**)
- Subcontracts with CO Detail (**Reports > Subcontract**)

Previously, these reports used information from Job Cost commitment change orders.

Project Management—Subcontract Reports

The following reports have been added to the **Reports** menu under **Subcontract**:

- Subcontracts with CO Detail
- Subcontract CO Form 1 (CR)
- Subcontract CO Form 2 (CR)

The following report has been added as the default **Subcontract CO** report on the **Change Management** tab (**File > Data Folder Settings > PJ Settings)**.

- PJ Subcontract CO Form 1 (T) (CR)

If you prefer, you can use PJ Subcontract CO Form 2 (T) (CR) as the default Subcontract CO report instead.

Project Management—Unreleased Documents Report

The Unreleased Documents report has been added to the **Reports** menu under **Other**.

Property Management—Amend Terminated Lease Process

Several enhancements were made to the amend lease process. The main feature allows you amend leases that have a status of terminated. You can use this feature for leases that may have been incorrectly terminated. In the **Amend Lease - New Amendment** window, you can select the lease you want to amend from a list of current or terminated leases. For leases that are terminated, the amend function includes the move-in portion of the process. The Amend Lease journal and lease modification history include more information about the status of the lease you are amending.

Property Management—Amend Lease Informational Messages

Messages have been added in the amend lease area to help you through the process. Any time you create a new amendment or edit a lease on an existing amendment in the amend lease task, a message appears that provides a way to print the step required to activate the amendment. If you click [**OK**] in the **Amend Lease –Effective Now** window, a message appears that provides information about how the software uses the dates you entered, with an option to print the topic.

Purchasing—Case Sensitive Searches for Inquiries

By using a case-sensitive search, you can narrow you search for inquiry orders (**Inquiry > Orders**).

Purchasing—New Data Sets

When you open Purchasing and you open a new data set, the process is consistent with the way you open new data sets in other Accounting applications.

Purchasing—Service Management Task and Settings

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

The SM Synchronization task and its related settings are available within the Purchasing application (**File > Data Folder Settings > SM Integration**). Previously, the synchronization task and settings were only available in the Inventory application.

Reconciliation Tool and Reports

A reconciliation tool and reports were added to this version of Accounts Payable, Accounts Receivable, Cash Management, General Ledger, and Job Cost. This feature is included to help streamline your reconciliation process.

You can access the Reconciliation tool from Sage Timberline Desktop. The reconciliation reports are available from Sage Timberline Desktop or from the **Reports** menu within the appropriate application.

The reconciliation tool provides the following features:

- **Dashboard**—A quick overview of your account reconciliation status for General Ledger, Cash Management, and Accounts Payable.
- **Account Reconciliation**—Each application has a page dedicated to the reconciliation of that specific sub ledger to the General Ledger. The Summary reports provide a

quick look at the sub ledger balance compared to the General Ledger balance, and it shows differences that might exist.

- **Batch Reconciliation**—Each application page contains a batch report that lists transaction-level detail in addition to the batch totals.
- **Common Out of Balance Causes**—Each application page provides this section, which includes reports that will help identify the most common causes for out of balance situations.
- **Common Period End Reports**—You can run common period-end reports.
- **Data Validation**—This feature allows you to validate the integrity of your data.
- **Multi-User**—This tool can be used by several users, such as controllers and those who specialize in a particular application.

Sage Timberline Desktop

The following enhancements have been made to the Timberline Office Desktop:

- Timberline Office Desktop has been renamed Sage Timberline Desktop.
- The **Catalog** pane has been renamed **Tasks**.
- The **Favorites** pane has been renamed **My Tasks**.
- All Timberline Office applications and menu items are located in the **Sage Timberline Office** folder in the **Tasks** pane.
- You can access menu items in the **Tasks** and **My Tasks** panes from the **Tasks** and **My Tasks** menus.
- Timberline Office Security has been implemented from the Sage Timberline Desktop menu items. You can access Timberline Office Security settings under **Tools > Security > Tasks (Operators and Groups)**.
- You can access all Cash Management, General Ledger, Payroll and Property Management menu items and functions from the Desktop. To learn more about Desktop, please see *Sage Timberline Desktop*. Desktop.pdf is available on your CD in the **Documents** folder.
- You can access the Reconciliation tool from the Desktop.

- The new Sage Software Information Center on the Sage Timberline Desktop contains sections for News and Announcements, Tips and Techniques, Training and Support, and Alerts and Notifications. You can access the Sage Software Information Center in the **Tasks** pane, and you can set it as your default home page under **Tools > Options Current Home Page [Use Default]**.

Service Management—Accounting Dates for Purchase Order Invoicing

You can select an accounting date when you approve an invoice for a purchase order.

Service Management—Billed Amount in Work Order List View

In the **Work Order List** on the **Location Details**, the **Billed** column has been replaced with a **Total Billed** column. **Total Billed** includes taxes billed.

Service Management—Calculate Payment Days

You can enter an invoice payment date when approving a vendor invoice. The default date is determined using the invoice date and Accounts Payable vendor information, but you may enter any date. Service Management will include the invoice payment date on the invoice information exported to Accounts Payable.

Service Management—Call Type Report

The **Call Type** report (calltlst.rpt) has been updated with a new invoice format field under the rate sheet column.

Service Management—Cancel Open Purchase Order Items

You can cancel open purchase order items in the purchase order view (**View > Purchase Orders**) by right-clicking an open purchase order and selecting **Cancel Open Items** from the menu.

Service Management—Change Standard Cost

You can change the standard cost of a part without the Inventory add-on installed.

Service Management—Default Payment Method

You can select the **Default payment method** on the **Taxes/Payments** tab under **File > Data Folder Settings > SM Settings**. You can change the **Usual payment method** on the service location's **Billing** tab.

Service Management—Default Work Order Item Type

You can select the **Default item type** on the **Work Orders** tab under **File > Data Folder Settings > SM Settings**. The default item type is **Parts**.

Service Management—Employee Sort Order

You can sort employee lists throughout Service Management, including the DBoard, by selecting **Name**, **PR Employee ID**, or **Alias** in the **Sort Employees by** box on the **Misc** tab under **File > Data Folder Settings > SM Settings**.

Service Management—Expiring Agreements

If an agreement has no billings generated for the current period, you can expire and then renew that agreement.

Service Management—Filter Views

You can filter the following views by clicking the buttons that appear at the top of the view:

- **Location List** (All, Customers, Jobs, Properties, Units)
- Work Orders List
- Agreements List
- Invoices List
- Purchases List
- Vendors List
- **Setup Location Lists** (Customers, Jobs, Properties, Units)
- **Setup Parts** (also used in WO Register)

- **Setup Flat Rate** (also used in WO Register)
- **Setup Miscellaneous Items** (also used in WO Register)
- **Work Order List Dialog** (used when entering POs)
- **Location View** tabs (Work Orders, Equipment, Agreement, Invoices, Leads, Notes)
- **Vendor View** tabs (Open POs, Closed POs, Notes)
- Edit Time Entries
- **Accounting Entries** window

Service Management—Invoices Generation in the Work Order Billing Invoice Tree

Invoices generate in the same order they appear in the **Work Order Billing - Invoice Tree**.

Service Management—Invoice List Report

You can double-click a work order's or agreement's invoice. Then, click the **[Preview]** button to open the invoice list report.

Service Management—Labor Detail Report

The **Labor Detail** report retrieves the correct unbilled items.

Service Management—Outstanding Balance in Location View

The balances in the aging buckets of a service location view now display an **Outstanding** balance.

Service Management—Part Description

The part's **Description** field on the work order's **Register** tab **Select part** window has increased from 26 characters to the full 40 characters allowed. Now you can read a more complete description.

Service Management—Prefill Labor Items

If you select the **Automatically prefill labor based on timestamps** check box on the **Work Orders** tab under **File > Data Folder Settings > SM Settings**, the labor items will prefill automatically on started and suspended timestamps.

Service Management—Preventive Maintenance Work Order Reports

The following reports have been updated so parts for preventive maintenance tasks that do not reference standard tasks appear on the report. In addition, the equipment description appears correctly on these reports if the manufacturer on the equipment is none:

- pmwrkord.rpt
- pmwrkord-both.rpt
- pmwrkord-pm.rpt
- pmwo(AU).rpt
- pmwo(AU)-both.rpt
- pmwo(AU)-pm.rpt

Service Management—Sort Views

If there are lookup buttons in the view, you can click a button to change the sort from ascending to descending, or descending to ascending order.

Service Management—Vendor Lookup View

The **Vendor Lookup** view (**View > Vendors**) has been updated to match the other lookup views in Service Management. You can look up vendors by **Vendor Name**, **Timberline Vendor ID**, **Address**, and **Phone**.

Service Management—Re-Open Cancelled Work Orders

You can re-open a work order that has a status of cancelled by selecting it in the list, right-clicking, and selecting **Re-Open Work Order** from the menu. The work order wizard will start and you can make the selections you want to apply when the work order changes to an open status.

Service Management—Reports

- The **SM Batch** report has been added to the **Reports > Accounting** menu.
- You can preview and print a new purchase order list report from the context menu on a work order's **Purchase Order** tab.
- You can preview and print an invoice list report from the context menu of a work order's **Invoice** tab and from an agreement's **Invoice** tab.

Service Management—Sales Tax Amount in Work Order Register

The sales tax amount for a small job work order appears on the **Register** tab.

Service Management—Standard Task Check List

The standard task check list is sorted in alphabetical order.

Service Management—Standard Task To-Dos

If you select more than one standard task for a preventive maintenance task, all related to-do items for each standard task appear on the work order. The following reports that list To-Dos have been updated:

- pmwrkord.rpt
- pmwrkord-both.rpt
- pmwrkord-pm.rpt
- pmwo(AU).rpt
- pmwo(AU)-both.rpt
- pmwo(AU)-pm.rpt

Service Management—Synchronize PR Employees

When you set up a new employee, you can select a **PR Employee ID** without first pressing [**Synchronize**]. The order of the **Employee ID** and **Name** has changed to simplify the entry process. The **PR Employee ID** will be saved correctly on the **SM Employee** record when you press [**Synchronize**].

Service Management—Hover Tip on the Part Description Field

A new hover tip has been added to the part's **Description** on the work order **Register** tab. This hover tip allows you to see the full description.

Service Management—Vendor List Report

The **Vendor List** report (vendolst.rpt) has been updated with the discount information of days and percent and the contact field. The vendor phone has been renamed vendor main phone.

Service Management—Vendor Synchronization

When you select **Tasks > Synchronize vendors from AP**, the Accounts Payable vendor retrieves the contact phone number instead of the main phone number.

Service Management—Voided? Column

The **Voided?** column appears in the **Accounting Entries** view and on the **Accounting Entries** tabs of work orders, invoices, and purchase orders.

Service Management—Work Order Item Description

The work order item's **Description** field increased from 50 characters to 61 characters to accommodate the full length of the part number, the description, and a space between the part number and description.

Service Management—Work Orders Report

The **Work Orders** report (wrkordlst.rpt) has been updated so the **Cost** field includes parts and miscellaneous cost in addition to labor cost.

TRA-SER Integrator—New Reports

If changes occur in pricing, such as manufacturer changes that cause trade services to discontinue or change items in their database, these changed items do not update in Sage Timberline's TRA-SER database. Two new reports have been added to TRA-SER Integrator to help you find and change items.

- **Item Code Report—**Click [**Item Code Report**] in the **Timberline TRA-SER** window to view and print a report that lists all discontinued items or items unlisted by the manufacturer.
- **TRA-SER Update Report—**This report appears each time you update your Estimating database from Trade Services data using the TRA-SER Integrator. The report lists all newly discontinued items and items without UPC codes. (That is, the report lists UPC codes that no longer reference the item.)

For additional information, please refer to the document *Getting Started with TRA-SER Integrator*. This document is located on your CD at \Documents\GettingStartedTRA-SERIntegrator.pdf.

Other

Accounting and Management Products Installation and CD

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

The Inventory and Purchasing applications are included on the Accounting and Management Products CD. To install Inventory and Purchasing, select D:\Install.exe from the Accounting and Management Products CD (D:\ represents your CD-ROM drive).

Activation Codes for Accounting and Management Products

During installation, the activation codes for the Accounting and Management Products are on one window. Previously, the activation codes were on two windows.

MAS Integration Server Installation

MAS Integration server installation is included on the Estimating Products CD (for MAS 90/MAS 200 integration).To install the MAS Integration server, go to: D:\AdditionalInstalls\EstMasInt (D:\ represents your CD-ROM drive).

Mobile Inventory and TRA-SER Installation

You can install Mobile Inventory and TRA-SER applications from the main Accounting and Management Products CD at D:\AdditionalInstalls\POIV (D:\ represents your CD-ROM drive).

MSDE Installation for Estimating Explorer Version 2

When you install Estimating Explorer Version 2, Microsoft® SQL Server™ Desktop Edition 2.0 (MSDE) will install as well. If your database administrators regularly back up the Estimating Explorer data, they must stop MSDE services before backing up the data. For instructions for stopping MSDE services, please see “I. Backup Estimating Explorer Version 2 Data” on page 56.

If you have customs reports created for a previous version of Estimating Explorer that used Access database, you must recreate the report for the current version, which uses SQL.

Pervasive Engine Installation

By installing the Pervasive engine, you can access databases and estimates from the server without installing Estimating. To install the Pervasive engine, select D:\Prerequisites\tspvinst\Setup.exe from the Estimating Products CD (D:\ represents your CD-ROM drive).

Supported Operating Systems

Sage 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.

Sage 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.

Sage Timberline discontinued support for Novell® NetWare® 4.2 and 5.1 as of December 31, 2004.

To learn about issues that have arisen since this document was published, open www.sagetimberlineoffice.com and click **Logon**. Once you have logged on, click **Release Update** at the top of the page.

Third Party Compatibility

Sage Timberline has tested and verified the following third party applications with Estimating. If you upgrade to a newer version of any of these applications after the 9.2.0 Sage Timberline Estimating release and discover incompatibility issues, we recommend you contact that third party's customer support. We will assist you to the best of our ability with the installation of applications we provide on the Sage Timberline Estimating Products CD, but we do not provide application support for third party software. The following versions of third party applications have been tested with Sage Timberline Estimating 9.2.0.

Interfacing Applications On the Estimating Products CD	Interfacing Applications Not On the Estimating Products CD
Sentinel Driver—7.1.0	Primavera PP—3.1
License Manager—7.3.0.2	Primavera ST—3.0
Cut and Fill—5.22.0	MS Project—2000 and later
Estimating Explorer—1.1.0.151	MAS 90/200—4.10
	Palm OS—4.x and 5.x
	GTCO driver—10.01 Build 19
	On-Screen Takeoff—-3.2.0.40

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 Sage Timberline application issues. To access the Knowledgebase, open the Sage Timberline Office web site: www.sagetimberlineoffice.com and click **Logon**.

Contact Information

U.S. or Canada

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

Australia

Accounting/Property Management: Call 1800-120-369, fax +503-439-5763, or e-mail timberline.support@bestsoftware.com
Estimating: Call 1800-120-369, fax +503-439-5333, or e-mail timberline.support@bestsoftware.com
Support hours: Monday through Friday 8 a.m. to 5 p.m. AET (Australian Eastern Time)

Asia-Pacific

Accounting/Property Management: Call +503-439-5763, fax +503-439-5763, or e-mail timberline.support@bestsoftware.com
Estimating: Call +503-439-5178, fax +503-439-5333, or e-mail timberline.support@bestsoftware.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 timberline.support@bestsoftware.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 9.1.x installations, review the bullets below to see changes that began with the 9.2.0 release. If you are a first-time installer of Accounting and Management Products, please skip to "Compatible CDs" on page 36.

- The installation prevents you from installing to a computer that uses Microsoft® Windows® 98 SE, Windows® Me, Windows NT®, or Novell® NetWare® 4.2 and 5.1. This is in accordance with Sage Timberline's discontinuance of support for these operating systems.
- Sage 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, Sage 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 **Startu**p folder to ensure proper initialization and improved performance.
- Purchasing and Inventory applications are part of the Accounting and Management Products 9.2.0 CD. To install these applications, run D:\Install.exe (D:\ represents your CD-ROM drive). This is the same program you would run to install other Accounting and Management Products.
- Mobile Purchasing, Mobile Inventory, and TRA-SER applications are part of the Accounting and Management Products 9.2.0 CD. To install these applications, go to D:\AdditionalInstalls\POIV (D:\ represents your CD-ROM drive).

- In 8.x.x and earlier releases, the installation had an **Install prerequisite software** step. This step has been incorporated into the **Install Timberline Office software** step. However, you can still manually install prerequisite software from the D:\Prerequisites subfolder.
- Previously, during the installation to a network workstation, you could choose whether to install system files (.exe and .dll files). Now, Sage Timberline Office always installs these files to the workstation.

Compatible CDs

- Accounting and Management Products 9.2.0 CD
- Estimating Products 9.2.0 CD
- Residential Management Application 9.2.0 CD

Supported CD Upgrade Paths

Upgrade from	Upgrade Path
8.3.x and 9.1.x	Upgrade directly to 9.2.0.
7.5.0–8.2.3	Upgrade to 8.3.x or 9.1.x. Then, upgrade to 9.2.0.
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. Then, upgrade to 9.2.0.
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. 3. Upgrade to 9.2.0.

A. Before You Install

1 If you are upgrading, back up all Sage 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 37. If you have a terminal server or peer network, please start with "D. Other Installation Scenarios" on page 39.

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 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 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 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**. This step installs components necessary to run Sage 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 "Install Estimating Products" on page 45 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 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**].

NOTE: During installation, the activation codes for the Accounting and Management Products are on one window. Previously, the activation codes were on two windows.

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 37), 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 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. 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 Sage 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 Sage 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 Sage 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 "Install Estimating Products" on page 45 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**].

NOTE: During installation, the activation codes for the Accounting and Management Products are on one window. Previously, the activation codes were on two windows.

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 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.

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 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 38.
- After you install Sage 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 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 the **[Use this account]** button. 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.

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 42.

Prepare to Upgrade Files

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

1. Back up your data files.
2. Make sure no one is using Sage 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**]. Then, select the drive that contains your Sage 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 you will upgrade.

Upgrade Files

1. In TS-Main, select **Tools > Upgrade 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 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
9.1.3 and earlier	All Accounting and Management application data files.

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 you changed previously and change them back to the original network path.

3 Close the **File Locations** window.

NOTE: You can select to upgrade files automatically 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. (That is, workstations that have both Estimating Products and Accounting and Management Products have already been configured as part of the Accounting and Management Products installation.)

1 Map a drive to the network shared location on the server or peer server where you installed Sage Timberline Accounting and Management Products. This shared folder should be a parent to the folder where you installed Sage 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 Sage 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, select T:\Timberline Office\Accounting\Wininst\Install.exe if T:\ is the drive 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 10 or Sage Timberline's Crystal Reports 10, 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 Sage Timberline applications may affect your custom report designs or custom third-party applications. Please contact your Sage Timberline Office business partner or certified consultant to discuss any issues relating to custom reports or third-party applications.

3 Sage 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

Version Change

The version number for Estimating has jumped from 7.1.3 to 9.2.0, so it corresponds to rest of the Sage Timberline Office applications. There were no interim Estimating releases between the 7.1.3 and 9.2.0 CDs.

Installation Changes

If you are familiar with Estimating Products 7.1.x installations, review the bullets below to see changes that began with the 7.1.0 release. If you are a first-time installer of Estimating Products, please skip to "Compatible CDs" on page 46.

- The installation prevents you from installing to a computer that uses Microsoft® Windows® 98 SE, Windows® Me, Windows NT®, or Novell® NetWare® 4.2 and 5.1. This is in accordance with Sage Timberline's discontinuance of support for these operating systems.
- Sage 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, Sage 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.
- Mobile Purchasing, Mobile Inventory, and TRA-SER applications are part of the Accounting and Management Products 9.2.0 CD. To install these applications, go to D:\AdditionalInstalls\POIV (D:\ represents your CD-ROM drive).

- MAS Integration server installation is included on the Estimating Products CD (for MAS 90/MAS 200 integration).To install the MAS Integration server, go to D:\AdditionalInstalls\EstMasInt (D:\ represents your CD-ROM drive).
- By installing the Pervasive engine, you can access databases and estimates from the server without installing Estimating. To install the Pervasive engine, select D:\Prerequisites\tspvinst\Setup.exe from the Estimating Products CD (D:\ represents your CD-ROM drive).
- In 7.x.x and earlier releases, the installation had an **Install prerequisite software** step. This step has been incorporated into the **Install Timberline Office software** step. However, you can still manually install prerequisite software from the D:\Prerequisites subfolder.
- When you install Estimating Explorer Version 2, Microsoft® SQL Server™ Desktop Edition 2.0 (MSDE) will install as well. If your database administrators regularly back up the Estimating Explorer data, they must stop MSDE services before backing up the data. For instructions for stopping MSDE services, please see "I. Backup Estimating Explorer Version 2 Data" on page 56.
- If you have customs reports created for a previous version of Estimating Explorer that used Access database, you must recreate the report for the current version, which uses SQL.

Compatible CDs

The following CDs are compatible:

- Accounting and Management Products 9.2.0 CD
- Estimating Products 9.2.0CD
- Residential Management Application 9.2.0 CD

Supported CD Upgrade Paths

You can upgrade any Windows-based version of Estimating Products (beginning with the 1.0 CD) to the Estimating Products 9.2.0 CD.

A. Before You Install or Upgrade

1. If you are upgrading, back up all Sage Timberline Office program and data files. Then 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).
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. 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.
4. Decide which installation instructions to read in this document. Most readers should start with “B. Install to a Workstation” on page 47. If you have Accounting and Management Products, a terminal server, or a peer network, please start with “D. Other Installation Scenarios” on page 49.

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 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. 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 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 48, otherwise skip to "E. Set up Stand-Alone Security Devices" on page 50.

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 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 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 If you want to install Estimating on the server, skip to step 4b. Otherwise, if you want to access databases and estimates from the server, but you do not want to install Estimating, proceed to step 4a.

a To install the Pervasive engine on your server without installing Estimating, click [**Start**] > **Run**. In the **Run** window, type D:\Prerequisites\tspvinst\Setup.exe (D:\ represents your CD-ROM drive). Click [**OK**].

Follow the instructions in the windows to install the Pervasive database engine.

b 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

To access Address Book, Job Cost, and tax data on a server, follow the steps below for each Estimating-only workstation. (That is, workstations that have both Estimating Products and Accounting and Management Products have already been configured as part of the Accounting and Management Products 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 Sage Timberline Accounting and Management Products. This shared folder should be a parent to the folder where you installed Sage 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 Sage 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 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 47.

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 51.

If you already use stand-alone security devices, skip to "G. Upgrade Estimates and Databases" on page 55.

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 www.sagetimberlineoffice.com and click **Logon**. From the **Knowledgebase**, search for a solution by typing and submitting How do I install the Sentinel driver?

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\SentinelDrivers\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 55.

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 50.

Guidelines

Please note the following:

- The Estimating Products 9.2.0 CD contains Sentinel LM 7.3.0.2 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).
- You cannot install License Manager to a terminal server or Novell® server. 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 Online Help* (index.html). This file is in the **AdditionalInstalls\LicenseManager\SysAdminHelp** 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 install the Sentinel driver manually, open www.sagetimberlineoffice.com and click **Logon**. From the **Knowledgebase**, search for a solution by typing and submitting How do I install the Sentinel driver?

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 "G. Upgrade Estimates and Databases" on page 55.

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. 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 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\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 7.3.0.2):

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.

6 Install the new version of License Manager. See "Install License Manager" on page 52.

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 56.

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** 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 on the screen.

8 If you are prompted to upgrade Address Book data, follow the steps in "E. Upgrade Data Files" on page 40.

Tips

- You must upgrade databases before you upgrade Estimates. This happens automatically if the database and the estimates 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 55). 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 Sage 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).

I. Backup Estimating Explorer Version 2 Data

When you installed Estimating Explorer Version 2, Microsoft® SQL Server™ Desktop Edition 2.0 (MSDE) installed as well. If your database administrators regularly back up the Estimating Explorer data, they must stop MSDE services (or the full version of SQL) before backing up the data.

Stop the MSDE services, back up your Estimating data files, and then restart MSDE services as follows:

1 Have all users quit Estimating.

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

3 Double-click the **MSSQL Server** icon in the taskbar notification area. (If you do not see this icon, use Windows Explorer to browse to C:\Program Files\Microsoft SQL Server\80\Tools\Binn\sqlmangr.exe. (C:\ represents your system drive.)

4 In the **SQL Server Service Manager** window, select **SQL Server** from the **Services** list and then click **[Stop]**.

5 When you see the message **Are you sure you want to STOP the MSSQLServer service on** (server name)**?**, click **[Yes]**.

6 Close the **SQL Server Service Manager** window.

7 Using Windows Explorer, browse to C:\Program Files\Microsoft SQL Server\MSSQL\Data. (C:\ represents your local disk drive.)

8 Copy the appropriate .mdf and .ldf files from the **Data** folder to a backup folder.

9 Double-click the **MSSQL Server**  icon in the taskbar notification area. (If you do not see this icon, use Windows Explorer to browse to C:\Program Files\Microsoft SQL Server\80\Tools\Binn\sqlmangr.exe. (C:\ represents your local disk drive.)

10 In the **SQL Server Service Manager** window, select **SQL Server** from the **Services** list and then click **[Start/Continue]**.

11 Select **SQL Server Agent** from the **Services** list, and then click **[Start/Continue]**.

12 Close the **SQL Server Service Manager** window.

Section 4
System Requirements

The hardware and software requirements below provide a guideline. For more detailed information, please contact your Sage 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
- 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: Database Editor does not support Windows terminal services.

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 application[1]
- **Accounting and Management Products on a workstation**: 295 MB available disk space (This assumes a server hosts accounting and management data.)[1]
- **Estimating Products on a server, workstation, or stand-alone computer**: 260 MB available disk space[1]
- **Residential Management on a server, workstation, or stand-alone computer**: 580 MB

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

Other Requirements—General

- CD-ROM drive
- Crystal Reports® Professional or Sage 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.)
- USB port or digitizing tablet connected to RS-232 serial port configured as COM1 or COM2

Sentinel Protection Device

Sage Timberline supports Sentinel SuperPro protection devices.

Estimating Products automatically install the Sentinel system driver if one is not already installed. To install this driver manually, run: D:\AdditionalInstalls\SentinelDrivers\Sentinel Protection Installer.exe (D:\ represents your CD-ROM drive). Alternately, you can download the driver from www.safenet-inc.com.

Supported Protocols

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