

SAGE TIMBERLINE OFFICE

Get Started

Accounting and Management Products 9.3.0
Estimating Products 9.3.0

sage
software

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Section 1

Release Overview

Introduction

Thank you for choosing Sage Timberline Office. In this release, you will find new Desktop tools that will help new customers streamline the essential setup of Sage Timberline Office. Setup Central, a new setup wizard, guides customers through the setup of mission-critical features based on proven implementation strategies. Workflow Centers organize common tasks, reports, and assistance to help orient customers to day-to-day processing. Job Central manages the tasks required to set up a job in a centralized location to simplify this task. Read more about the Desktop tools on [page 3](#).

This release also contains improvements to existing applications. Be sure to read supporting documentation before you install:

- This *Get Started* document contains an overview of this 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.
- **SetupCentral.pdf provides a basic orientation to the Desktop tool. This document is available on your CD in the Documents folder.**

These documents are current at the time of the release. To review additional support documentation, open www.sagetimberlineonline.com. See “Sage Timberline Online” on [page 5](#) for more information.

Sage Software

In order to better align with our global parent company, Best Software is now Sage Software. While our name has changed, 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 Sage Timberline Office Desktop through your Internet connection.

New Features in Accounting and Management Products 9.3.0

New Desktop Tools in Sage Timberline Office

This release includes new Desktop tools, which are designed to guide you through the essential setup of Sage Timberline Office applications. Your authorized business partner and certified consultant will work with you to determine how to use these new Desktop tools most effectively based on your resources, schedules, and business requirements.

We recommend that you work with your authorized business partner and certified consultant to help you:

- Determine whether the Desktop tools are a good fit for your company based on your business processes.
- Highlight any decisions that are irreversible.
- Strategize about your implementation plan.
- Identify and address special reporting needs.
- Schedule any targeted training that might be helpful, and direct you to Sage Timberline Office's Anytime Learning for further training.
- Access the many tools offered in addition to Setup Central, including the Reconciliation Tool, Sage Timberline Online, Job Central, and Workflow Centers.

Setup Central Wizard

Setup Central consists of a set of wizards that guide you through essential setup options of Sage Timberline Office applications. Depending on your business needs, Setup Central may not be the best tool for you to use to set up your software. Be sure to check with your business partner or certified consultant. If you decide that Setup Central is a good match for your company, you can use the tool to set up General Ledger, Cash Management, Accounts Payable, Accounts Receivable, Payroll, Billing, Contracts, Job Cost, and Financial Statements. There are also setup wizards designed to take you through the process of setting up sales taxes and beginning balances.

Use Setup Central to set up your software for the first time and to set up any separate companies that you require. This new feature steps you through the essential setup of these applications. You will find Setup Central on your Sage Timberline Office Desktop at **Sage Timberline Office > Common Tasks > Tools > Setup Central**. For additional

assistance with applications not included, you should work with your authorized business partner or certified consultant.

Job Central Wizard

Use Job Central to set up the most essential elements of a single, contract-based job. You can use this wizard any time you set up a job, even after your initial configuration of the software. This wizard helps you set up contract amounts for quick bill jobs and contract-based billing jobs (not cost-based billing jobs). You will find Job Central on your Sage Timberline Office Desktop at **Sage Timberline Office > Job Cost > Job Central**.

Workflow Centers

The **Workflow Centers** provide quick access to the most common Sage Timberline Office tasks. These tools are designed for anyone who is new to Sage Timberline Office as an orientation to day-to-day processing. As you become familiar with your software, you can take advantage of the customizable Sage Timberline Office Desktop to set up tasks that you use on a regular basis.

In addition to the Workflow Centers to perform your regular workflow tasks and access essential reports, Workflow Centers also provide you with quick links to user assistance such as online Help, the Sage Timberline Office Knowledgebase, and Anytime Learning services. This is a helpful way for new employees to learn how to use these tools in their day-to-day work. There are Workflow Centers for your accounts payable staff, billing staff, payroll staff, controller, and contract administrator. You will find the Workflow Centers at **Sage Timberline Office > Additional Tools**.

Getting Started With the Desktop Tools

(Information from PDF)

Other

Supported Operating Systems

Sage Timberline Office 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 Office discontinued support for Windows® 98 SE, Windows® Me, and Windows NT®.

Sage Timberline Office 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.sagetimberlineonline.com. See the register and log on instructions under Additional Electronic Documentation

Additional Electronic Documentation

The *Technical System Reference* provides detailed information about system and environment considerations to ensure your network is ready to install Sage Timberline Office. You will also find what you need to prepare before you install. This document, which replaces parts of the *Resource and Installation Guide*, is available on your CD in the **Documents** folder.

Online Help

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

Sage Timberline Online

Get instant access to software services and 24/7 support. Simply log on and get information about software updates and network patches, or view, update, and submit online support incidents. With Sage Timberline Online, you will have access to the following:

Technical Support Knowledgebase

Access the Technical Support Knowledgebase 24 hours a day, seven days a week for solutions and answers to 4,800 topics as well as software alerts, notices, release guides, and year-end information. This is the same online tool our support staff uses when responding to calls from service plan customers. To access the Knowledgebase, open www.sagetimberlineonline.com. The first time you visit the site you will complete a registration process and create your own Sage Timberline Office Online Passport ID. To complete the registration process, each individual authorized by your company needs:

- A unique e-mail address.
- Your Client ID number.
- Your TS-Main activation code found under the “Help/About” section of the TS-Main window.

User Forums

Exchange information with Sage Timberline Office users.

Support Incidents

Review your support-call activity, update open incidents, submit a new incident, or add a note to an existing incident. Our Customer Support department is available to respond to online inquiries between 6 a.m. and 5 p.m. (Pacific Time) Monday through Friday. For international customers, Support will respond between 8 a.m. and 5 p.m. (GMT + 10:00) Monday through Friday.

Training Information

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

Customer Information

Update your individual contact information whenever it is convenient, view applications owned and the number of uses of each application, access activation codes, request additional uses of applications, view service plan information, request to renew your service plan, and get authorized business partner or certified consultant information.

Contact Information

Online Support Request

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

- 1 Open www.sagetimberlineonline.com.
- 2 Click **Solve > Support > Request Support**. This sends your request directly to Customer Support.

Phone Support

If you prefer to speak to Customer Support, call 800-551-8307. Support hours are Monday through Friday from 6 a.m. to 5 p.m. Pacific Time (PT).

Upgrading Your Service Plan

If your service plan does not provide online technical support, you may add or upgrade a service plan by calling 800-858-7098 or by opening www.sagetimberlineonline.com and clicking **My Profile > Service Plans**.

Section 2

Install Accounting and Management Products

Installation Changes

If you are familiar with Accounting and Management Products installations, review the bullets below. If you are a first-time installer of Accounting and Management Products, please skip to [“Compatible CDs” on page 10](#).

- 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 Office’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.
- Purchasing and Inventory applications are part of the Accounting and Management Products 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 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 Sage 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 9.3.0 CD
- Estimating Products 9.3.0 CD
- Residential Management Application 9.3.0 CD
- Document Management 9.3.0 CD

Supported CD Upgrade Paths

Upgrade from	Upgrade Path
8.3.x and 9.2.x	Upgrade directly to 9.3.0.
7.5.0–8.2.3	Upgrade to 8.3.x or 9.1.x. Then, upgrade to 9.3.0.
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 9.3.0.
5.4.x or earlier	<ol style="list-style-type: none"> 1. From TS-Main, select Tools > File Doctor and apply this utility to all files before you upgrade your 5.4.x installation. You cannot wait until after the upgrade to perform this check because later versions of File Doctor are not compatible with 5.4.x data. 2. Upgrade to 7.5.x or 7.6.x. 3. Upgrade to 8.3.x or 9.1.x. 3. Upgrade to 9.3.0.



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

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 11](#). If you have a terminal server or peer network, please start with [“D. Other Installation Scenarios” on page 13](#).

B. Install to a Server or Stand-Alone Computer

- 1 At the server or stand-alone computer, log on with full administrative rights. Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives). If you are unsure whether you have full administrative rights, ask your network administrator for assistance. 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 Sage 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 19](#) 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 11](#)), follow these steps to set up your workstations.

- 1 At the workstation, log on with full administrative rights. Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives). If you are unsure whether you have full administrative rights, ask your network administrator for assistance. 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 19](#) 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 12](#).
 - 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 17](#).

Prepare to Upgrade Files

The following instructions assume that you upgrade data files at your server. Sage Timberline Office 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 Office 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
9.2.x 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.



NOTE: You must upgrade Purchasing and Inventory at the server. A special processing segment has been added to Purchasing and Inventory that occurs between the data upgrade and the report menu upgrade. This processing may cause the upgrade to take a while.

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: 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 Office 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 Sage 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 Office'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 Office applications may affect your custom report designs or custom third-party applications. Please contact your Sage Timberline Office authorized business partner or certified consultant to discuss any issues relating to custom reports or third-party applications.
- 3** Sage Timberline Office provides numerous supporting documents in Adobe® Acrobat (pdf) format. If you do not already have Adobe Acrobat or Acrobat Reader, you should install Acrobat Reader by starting the program:
D:\AdditionalInstalls\Adobe\ar500enu.exe on your Accounting and Management Products CD (D:\ represents your CD-ROM drive).

Section 3

Install Estimating Products

Installation Changes

If you are familiar with Estimating Products 7.1.x installations, review the bullets below. If you are a first-time installer of Estimating Products, please skip to [“Compatible CDs” on page 20](#).

- 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 Office’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 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 30](#).
- If you have custom 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 9.3.0 CD
- Estimating Products 9.3.0 CD
- Residential Management Application 9.3.0 CD
- Document Management 9.3.0 CD



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

Supported CD Upgrade Paths

You can upgrade any Windows-based version of Estimating Products (beginning with the 1.0 CD) to the Estimating Products 9.3.0 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 21](#). If you have Accounting and Management Products, a terminal server, or a peer network, please start with [“D. Other Installation Scenarios” on page 23](#).

B. Install to a Workstation

- 1 At the workstation, log on with full administrative rights. Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives). If you are unsure whether you have full administrative rights, ask your network administrator for assistance. 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 22](#), otherwise skip to [“E. Set up Stand-Alone Security Devices” on page 24](#).

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 your network administrator for assistance. Alternately, you can ask your network administrator to log on with the network administrator ID before you start the installation.
- 2 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 Office 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 21](#).

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 25](#).

If you already use stand-alone security devices, skip to [“G. Upgrade Estimates and Databases” on page 28](#).

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 28](#).

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 24](#).

Guidelines

Please note the following:

- The Estimating Products 9.3.0 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. If you have a terminal server, install to a workstation.
- If you use firewall software on your license server, you may not be able to use the wlmadmin or wcommute applications to view or check out licenses. To resolve this issue, discuss the server's firewall security with your network administrator. If you are willing to adjust your firewall security settings on the license manager server, consider granting access to the lservnt.exe file.

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 28](#).

- 1 Log on with full administrative rights. Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard drives). If you are unsure whether you have full administrative rights, ask your network administrator for assistance. 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 26](#).

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 29](#).

- 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 14](#).

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 28](#)). 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 Office 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 Office authorized business partner.

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 application¹
- **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 space¹
- **Residential Management on a server, workstation, or stand-alone computer:** 580 MB

¹Add 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 Office'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.)
- UniMessage Pro™ (supported for on-line faxing in Purchasing and Inventory)

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 Office 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.