

# Sage Timberline Enterprise Installation and Maintenance Guide



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# Preparation

This guide provides the information you need to install Sage Timberline Enterprise on your network—including system requirements, configuration instructions for the prerequisite software, and instructions for creating your company’s database. You’ll find the following sections in this guide:

- This **Preparation** section gives you an installation checklist to keep track of your progress; the system requirements; and instructions for configuring your network.
- The **Server Installation** section walks you through each of the steps for installing Microsoft SQL Server, IIS, Sage Timberline Enterprise, and the additional Payroll and Estimating modules on the server.
- The **Server Configuration** section shows you how to activate your licenses, set up administrators, and get started with a sample database. It also gives you the information you need to start developing a security plan for your company’s business database.
- The **Workstation Installation** section walks you through setting up client workstations.
- In the **System Maintenance** section, learn about the routine maintenance tasks you’ll perform on your Sage Timberline Enterprise system.

Read through this guide carefully and make sure you have all of the components necessary to ensure a successful installation.

This guide and related materials will be updated periodically with new information and posted on the [Sage Customer Portal](#).

## Revision History

Date	Revised by	Comments
02/02/10	SD	Initial Draft
02/18/10	SD	Updates based on reviewer feedback.
4/1/2010	AG	Revisions
06/24/10	AG	

# Installation Checklist

Complete these steps to install Sage Timberline Enterprise on a client/server network.

Task	Information
<input type="checkbox"/> Review the system specifications for Sage Timberline Enterprise and complete any necessary upgrades.	page 7
<input type="checkbox"/> Prepare your hardware and network environment.	page 15
<input type="checkbox"/> Determine the location for your database, spools, and attachments folders.	page 17
<input type="checkbox"/> Install Microsoft SQL Server 2008 and configure it to work with Sage Timberline Enterprise.	page 22
<input type="checkbox"/> Install and configure Microsoft Internet Information Services.	page 43
<input type="checkbox"/> Install Sage Timberline Enterprise server software.	page 47
<input type="checkbox"/> Install Payroll (optional).	page 50
<input type="checkbox"/> Install Estimating and License Manager (optional).	page 55
<input type="checkbox"/> Run the Sage System Administration Configuration Wizard.	page 64
<input type="checkbox"/> Activate Your Sage Timberline Enterprise Licenses.	page 71
<input type="checkbox"/> Set up a sample database and configure user access.	page 73
<input type="checkbox"/> Develop your security plan.	page 81
<input type="checkbox"/> Set up roles, features, and users in Sage System Administration.	page 85
<input type="checkbox"/> Install Sage Timberline Enterprise client software.	page 92
<input type="checkbox"/> Test the installation by opening Sage Timberline Enterprise on a workstation.	page 101
<input type="checkbox"/> Check for Sage Timberline Enterprise updates.	page 117

# System Requirements

The performance of your Sage Timberline Enterprise system depends on having sufficient resources, including processor speed, memory, hard drive capacity, disk I/O, and network bandwidth.

Below are the minimum requirements for installing Sage Timberline Enterprise on your network. Note that other software products, including the operating system, also have minimum requirements which you will need to consider alongside those for Sage Timberline Enterprise.

Review your overall system infrastructure needs to ensure that your hardware and software have the resources necessary to meet your business demands. If you are considering obtaining new servers for Sage Timberline Enterprise or any of its components, request the *Sage Timberline Enterprise Server Buying Guide* from your business partner.

## Network Requirements

Your network must meet the following requirements.

- You must install Sage Timberline Enterprise on a server that is a member of a Windows domain (Windows Server 2003, 2008, or 2008 R2).
- Do not install Sage Timberline Enterprise on your domain controller.
- If you have enabled a firewall on the server that will hold Sage Timberline Enterprise and SQL Server, you must configure it as follows to allow access to and from the workstations.
  - Allow HTTP and HTTPS incoming traffic (ports 80 and 443).
  - Allow HTTPS outgoing traffic (port 443) to the outside Internet. (This is a requirement of the Entitlement Service.)
  - Allow the port used by the SQL Server Instance. If you use only one SQL Server instance on the server, in most cases this is port 1433. If you have multiple named instances, the firewall ports are set dynamically, or you may want to configure a fixed port.
- You must have Internet connectivity for license activation. Once licenses are activated you do not have to remain connected to the Internet, but other frequently performed functions such as software updates, Payroll updates, and email require connectivity.
- You can install Sage Timberline Enterprise on a different server than the database server. If you do this, you must set up Active Directory as described on page 15, step 4.
- You can set up Sage Timberline Enterprise on a virtual server, and you can access it through a terminal server.

## Supported Protocols

You must have either TCP/IP (Transmission Control Protocol/Internet Protocol) or RDP 6.1 (Remote Display Protocol) on your network.

## Servers

### Server Operating Systems

These operating systems are supported for Sage Timberline Enterprise production servers:

Operating System	Edition/Version	Service Pack
Windows Server 2008 (x86/x64)	Standard, Enterprise	SP2
Windows Server 2008 R2 (x64 only)	Standard, Enterprise	
Windows Server 2003	Standard, Enterprise	SP2
Windows Server 2003 R2	Standard, Enterprise	SP2



**NOTE:** Windows Small Business Server is not a supported operating system for Sage Timberline Enterprise servers.

### Minimum Server Hardware Specifications

Following are the minimum hardware requirements for servers in a production environment.

Item	Minimum	Notes
Processor speed	Quad-Core, 1.8Ghz Xeon or equivalent	Processor speed is important on both the server and workstation. The majority of Sage Timberline Enterprise processing occurs on the workstation, but in future releases, the server will take on additional processing duties.
Random Access Memory (RAM)	4 GB RAM	System performance is directly affected by the amount of RAM on the server. We recommend that you install as much RAM as possible. If you plan to use more than 4 GB RAM, you will need to use a 64-bit operating system to take advantage of the greater memory. If you plan to run terminal services as well as Sage Timberline Enterprise on the same server, you need more than 4 GB RAM. See the section "Recommendations for Sage Timberline Enterprise Servers."



Item	Minimum	Notes
Free Disk Space	10 GB for Sage Timberline Enterprise and SQL Server without Payroll. 12 GB for Sage Timberline Enterprise, SQL Server, and Payroll.	These amounts include 5 GB free space for your database. Additionally, you should allow for at least 10 GB free space for database growth in the future.  We strongly recommend that you configure your system with redundant disk arrays (RAID), and that you separate the system and data files onto different RAID arrays. This can protect you from loss of data due to failed hard drives, and can also maximize performance.
Screen resolution	1024 x 768	Any computer on which you plan to use more than one monitor or a higher screen resolution must have a video card sufficient to support the greater requirements.
DVD drive	Required for installation of Sage Timberline Enterprise.	

## Recommendations for Sage Timberline Enterprise Servers

If you plan to purchase a server to use with Sage Timberline Enterprise, we strongly recommend that you select Windows Server 2008 R2 for your operating system because of its support for RAM configurations greater than 4GB. Ask your business partner for a copy of the *Sage Timberline Enterprise Server Buying Guide* to see more detailed recommendations.

### Terminal Servers

If you will use Remote Desktop Services (terminal services) with Sage Timberline Enterprise, you must consider the server resources required for the added client sessions on the terminal server in addition to the server processing needs of Sage Timberline Enterprise and SQL Server. We recommend Windows Server 2008 R2 because of its support for RAM configurations greater than 4 GB.

### Virtual Servers

You can install Sage Timberline Enterprise on a virtual machine. The virtual machine must meet the operating system and configuration requirements for server installations of Sage Timberline Enterprise. To accommodate this, the host hardware may require more resources than the minimum to support the overhead associated with running the host operating system and other applications or virtual machines. Consider increasing the CPU speed, amount of RAM, hard disk speed, and network bandwidth to support this configuration. If an issue is discovered while using a virtual machine and customer support is not able to reproduce it in a non-virtual environment, work with your business partner or virtual machine manufacturer to resolve the issue.



**NOTE:** If you use a USB drive on a virtual machine, you may need to obtain third-party hardware or software such as AnywhereUSB.

### Estimating License Manager Server

If you plan to install Estimating and you will use License Manager to manage your concurrent uses of the software, you must designate one computer as a license server. The license server can be the same server as your Estimating server if you wish—but it cannot be a terminal server. The License Manager server must have a fixed IP address.

If the license server is a workstation, the workstation must always be on. It cannot be restarted like a typical workstation because all Estimating workstations depend on this machine for licenses.



**NOTE:** When you first install License Manager on the server, the server and all workstations that will use Estimating must be on the same subnet. After you install License Manager you can move workstations to a different subnet if you need to. For more information, check the Sentinel License Manager help and accompanying documentation.

## Required Supporting Software on the Server

The following are third-party components required by Sage Timberline Enterprise. You must install these components on your system before you can install Sage Timberline Enterprise.

### Microsoft SQL Server 2008 SP1

You must obtain a license for SQL Server 2008 and apply Service Pack 1 to the instance that hosts Sage Timberline Enterprise. We recommend that you also install Cumulative Update 7 for Service Pack 1 (see page 36).

Either the Standard or Enterprise editions of SQL Server are supported, and 32-bit or 64-bit versions are acceptable. SQL Server Express and the Workgroup edition of SQL Server are not supported for use with Sage Timberline Enterprise.

You can install Microsoft SQL Server on a different server than Sage Timberline Enterprise. This guide lists some configuration requirements for that scenario at the relevant points.

### Microsoft Internet Information Services (IIS)

Sage Timberline Enterprise requires IIS. If you install Sage Timberline Enterprise on a different server than the database server, install IIS on the server with Sage Timberline Enterprise.

Installation details for IIS are provided in the section on installing IIS starting on page 43. Your operating system determines which version of IIS you install.

- Windows Server 2008 or Windows Server 2008 R2 come with IIS 7.0.

- Windows Server 2003 comes with IIS 6.0.

### Microsoft Office 2007 with Service Pack 2

Sage Timberline Enterprise integrates with the following Microsoft Office 2007 applications:

- Excel is used to integrate with worksheets in Job Management and financial statements in General Ledger.
- Outlook is required for sending emails, such as transmittals in Job Management.

If you plan to use the Excel or email integration features, you must install Microsoft Office 2007 with Service Pack 2 on workstations. (This is also true for terminal server uses.) If Microsoft Office 2007 is not present at the time you install Sage Timberline Enterprise on a computer, the installation routine skips installing the Excel integration feature. If you plan to use Excel integration later, you will need to install this feature at a later time.



**NOTE:** Sage Timberline Enterprise requires that Service Pack 2 or greater be applied to Microsoft Office 2007. The integration does not currently work with the Beta version of Microsoft Office 2010.

## Workstations

### Workstation Operating Systems

These operating systems are supported for Sage Timberline Enterprise workstations.

Operating System	Edition	Service Pack
Windows 7 (x86 and x64)	Ultimate, Enterprise, Professional	
Windows Vista (x86 and x64)	Ultimate, Business	SP2
Windows XP (x86)	Professional	SP3

### Minimum Workstation Hardware Specifications

Following are the minimum hardware requirements for workstations.

Item	Minimum	Notes
Processor speed	Dual core, 2.4 GHz	Processor speed is important on both the server and workstation. The majority of Sage Timberline Enterprise processing occurs on the workstation, but in future releases, the server will take on additional processing duties.

Item	Minimum	Notes
Random Access Memory (RAM)	4 GB RAM (Windows 7 or Windows Vista) 2 GB RAM (Windows XP)	System performance is directly affected by the amount of RAM. We recommend that you install as much RAM as possible. Windows 7 and Vista use large amounts of memory, so we recommend that you have more RAM on these types of machines.
Hard drive space	750 MB for Sage Timberline Enterprise only. 2 GB for Sage Timberline Enterprise and Payroll.	
Screen resolution	1024 x 768	Any computer on which you plan to use more than one monitor or a higher screen resolution must have a video card sufficient to support the greater requirements.
Printer		Use a Microsoft certified print driver.

## Additional Components Installed Automatically

The following are third-party components required by Sage Timberline Enterprise that are included as part of the installation process if they do not already exist on your machine. This information is only for your reference. You do not need to obtain these components separately.

Component	Version and Notes
Microsoft Visual C++Runtime	9.0 SP1
Microsoft .NET Framework	.NET 3.5 SP1
Microsoft Management Console (MMC)	3.0
VSTO Runtime	3.0
Infragistics	2008 WPF Vol. 1 2008 Vol. 2 2007 Vol. 3
Aatrix	Installed for 1099 forms used by Accounts Payable and for other forms used by the optional Payroll module.



# Prepare Your Hardware and Network Environment

Complete these tasks to prepare your network environment for Sage Timberline Enterprise installation.

1. Verify that all servers and workstations meet the minimum hardware and operating system requirements as outlined in the previous section.
2. If you do not have a Windows domain set up on your network, create a domain now and configure the Active Directory. Consider the following:
  - All Sage Timberline Enterprise servers, workstations, and users must be set up in Active Directory with access to this domain.
  - The server that functions as your domain controller cannot be the same as the Sage Timberline Enterprise server. You may need to obtain a new server or set up a virtual machine environment for Sage Timberline Enterprise.
3. Decide whether your employees will access Sage Timberline Enterprise through a terminal server. If so, will the terminal server also be the application server, or will you have separate servers for each function? Obtain the necessary servers and configure them on your domain. (If you will use Estimating License Manager, the terminal server cannot be the license server.)
4. If you plan to install Sage Timberline Enterprise on a different server than the database server, you must set delegation correctly in Active Directory.
  - a. Log on to the domain controller as domain administrator, and open **Active Directory Users and Computers**.
  - b. Locate the computer object for the Sage Timberline Enterprise server. Right-click the computer and select **Properties**.
  - c. Click the **Delegation** tab, and select the option **Trust this computer for delegation to any service (Kerberos only)**. Click **OK**.
5. Designate at least one person to be the system administrator for Sage Timberline Enterprise. Considering the following:
  - The administrator is the person who will configure Sage System Administration, including creating and configuring the database, granting access to software features, and assigning users to roles.
  - The Sage Timberline Enterprise administrator is also a SQL Server system administrator for the instance on which you configure Sage Timberline Enterprise.
  - The Sage Timberline Enterprise administrator must be able to log on to the server with Administrator privileges in order to open Sage System Administration.

6. Configure your firewall settings.
  - If you have enabled a firewall on your Sage Timberline Enterprise server, you must configure it to allow HTTP and HTTPS incoming traffic (ports 80 and 443). You must also allow HTTPS outgoing traffic (port 443) to the outside Internet (Entitlement Service Requirement).
  - If you use only one SQL Server named instance on the server, in most cases it uses port 1433. Edit your firewall exceptions to allow port 1433 (if using the default settings) or whichever port you selected for the instance. If you have multiple named instances, the firewall ports are set dynamically. You may want to configure a fixed port for use with your firewall. For more information, see this article:  
<http://msdn.microsoft.com/en-us/library/cc646023.aspx>.
7. Verify your Internet connection. You must have Internet connectivity for license activation. Once licenses are activated you do not have to remain connected to the Internet, but other frequently performed functions such as software updates, Payroll updates, and e-mail require connectivity.



# Determine the Location of Data and Shared Folders

Sage Timberline Enterprise and SQL Server will access certain folders that store files related to your databases. You specify the location of these folders during installation. You should decide upon the location of these folders now based on your network and security requirements.

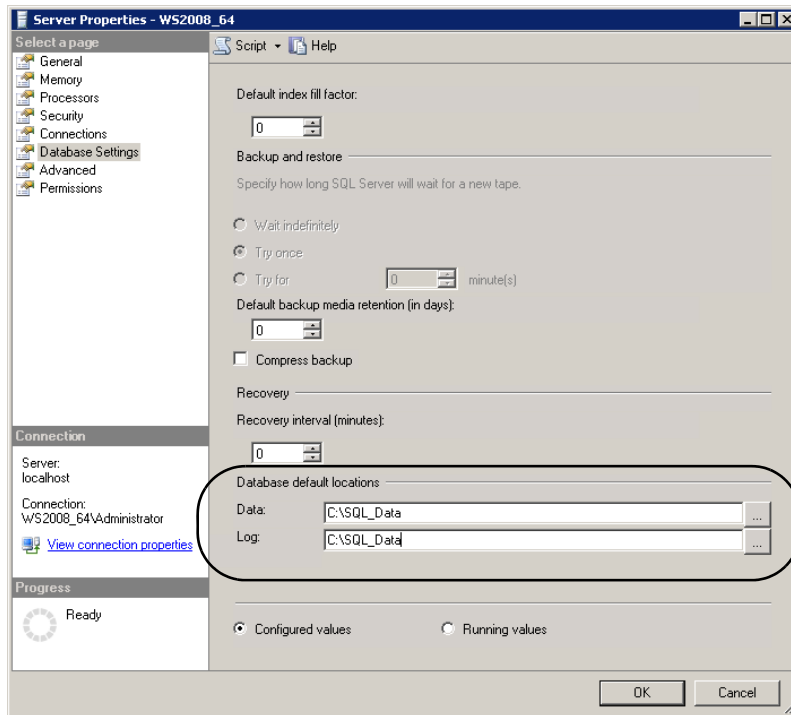
The folders you will create are as follows:

- **Default Data and Log folder for SQL**—This is the default location for all databases and log files associated with a given SQL Server instance.
- **Attachments folder**—This location stores files that you associate with records in Sage Timberline Enterprise. For example, you might have blueprint drawings attached to a job. We recommend that you have a separate Attachments folder for each database that you set up in Sage Timberline Enterprise.
- **Spool folder**—This location stores print output files from reports if you send them to the print spool. We recommend that you have a separate Spool folder for each database that you set up in Sage Timberline Enterprise.

## Default Data and Log Folder

Create the folder that will hold your data and logs before you install SQL Server, because you will specify its location during installation. This folder should not be on the root of a drive. (For example, do not specify it as simply C:\. A common practice is to place these folders inside a parent folder, such as the appropriate subdirectory of C:\ProgramData.)

SQL Server requires that the data and log files be stored on a physical drive located on the same machine as the SQL Server instance. The drive on which these folders are stored must have sufficient space to hold your database as it grows.



**WARNING:** When you install SQL Server, you see a default folder path for data and log files, but you must change it to the location you set up for your default data and log files.

The permissions on these folders must allow access to SQL Server administrators as well as Sage Timberline Enterprise administrators. Follow these steps:

1. Create the default data and log folder in the location you determine, which must be on the same physical machine as the SQL Server instance.
2. Open the **Properties** window for the folder and click the **Security** tab. (The steps to do this differ according to your Windows operating system. Consult the Windows Help topic on changing folder properties.)
3. Add the appropriate administrator groups or individuals to the permissions list.

## Attachments and Spool Folders

Create the Attachments and Spool folders before you set up databases in Sage System Administration, because you will specify the location of these folders during database setup.

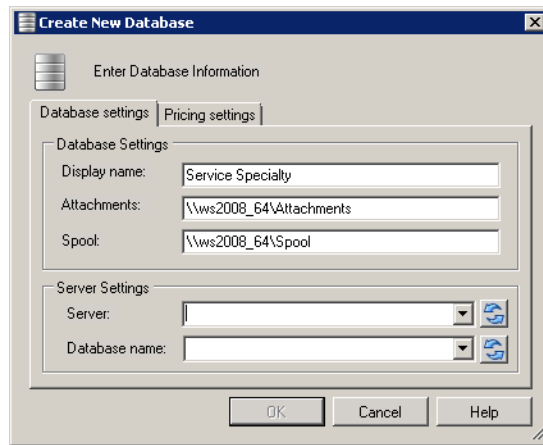
If you will have multiple company databases, we recommend that you create separate Attachments and Spool folders for each database. This prevents users of one database from having access to attachments and spool files from another database.

These folders should not be on the root of a drive. For example, do not specify them as simply C:\Attachments or C:\Spool. A common practice is to place these folders inside a parent folder, such as the appropriate subdirectory of C:\ProgramData..

You must share the Attachments and Spool folders with all users of the company database to which the folders correspond. (Sage Timberline Enterprise users who do not need to access attachments or spool files do not need this access.)



**NOTE:** Consider creating Active Directory groups for your Sage Timberline Enterprise users so that you can add the group to the folder permissions. This facilitates security maintenance by letting you control group membership in Active Directory only.



To configure the Attachments and Spool folders, follow these steps.

1. Create the Attachments and Spool folders in the location you determine.
2. Open the **Properties** window for each folder and click the **Sharing** tab. (The steps to do this differ according to your Windows operating system. Consult the Windows Help topic on changing folder properties.)
3. Share the folder.
4. Set the permissions on the sharing to include each of the users with whom you want to share the folder.



# Server Installation

This section guides you through the server installation steps for Sage Timberline Enterprise and related components. You should already have completed all of the steps in the **Preparation** section.

This section includes the following procedures:

- Install and configure Microsoft SQL Server, starting on page 22.
- Install and configure Internet Information Services, starting on page 43.
- Install Sage Timberline Enterprise on the server, starting on page 47.
- Install Payroll on the server, starting on page 50.
- Install Estimating, starting on page 55.

# Install Microsoft SQL Server 2008

You must install Microsoft SQL Server 2008 (Service Pack 1), specify the default database location, and configure it to use TCP/IP before you install Sage Timberline Enterprise.

You may already have SQL Server installed. If so, confirm that you have the correct version, upgrade if necessary, and configure it for Sage Timberline Enterprise.

For more information on SQL Server, visit Microsoft's Web site:

<http://msdn.microsoft.com/en-us/sqlserver/default.aspx>.

## Before you Begin

Complete these tasks before you begin the installation of SQL Server.

- Decide on a SQL Server administrator password. Make note of this password, as you will need it to perform SQL Server administrative tasks.
- Have your product key for SQL Server available. (You may not have a product key if you obtained SQL Server as a bundled product with Sage Timberline Enterprise.)
- Verify your firewall settings, as described below.
- Decide which SQL Server instance you will use (see considerations on the next page).

## Verify your Firewall Settings

You should have already configured your firewall as described in the section "Prepare Your Hardware and Network Environment" on page 15. If your firewall is not configured correctly when you install SQL Server, you may not be able to establish communication between the server and clients.

If you use only one SQL Server instance on the server, in most cases it will use port 1433 for SQL Server traffic. If you have multiple named instances, the firewall ports are set dynamically. You may want to configure a fixed port for use with your firewall, for security.

To allow incoming SQL traffic to access your server in a client-server environment, you must edit your firewall exceptions to allow port 1433 (if using the default settings) or whichever port you selected for the instance.

For more information, see this article

<http://msdn.microsoft.com/en-us/library/cc646023.aspx>.

## Decide Which SQL Server Instance You Will Use

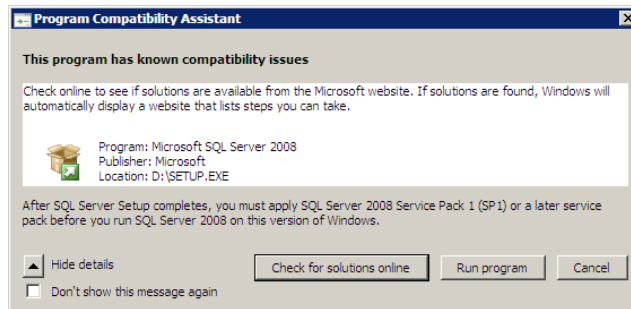
Each time you install SQL Server, you create an instance, or a copy of SQL Server running on the computer. Each computer has a single default instance, and you can add additional named instances if you want.

Before you install SQL Server to work with Sage Timberline Enterprise, decide whether to use the default instance or a named instance. This table helps you compare these two options:

<b>Using the Default Instance</b>
Results in the simplest installation if you have no other applications running on SQL Server.
Requires you to grant SQL Server administrative privileges to the Sage System Administrator, opening all databases (regardless of associated application) to that administrator.
Requires that all SQL applications running on the default instance be compatible with SQL Server 2008 Service Pack 1.
<b>Using a Named Instance</b>
Allows you to keep database access and security for other applications separate from Sage Timberline Enterprise databases.
May require you to open additional firewall ports to enable SQL Server communication with the client.
Allows you to limit administrative access to databases for applications other than Sage Timberline Enterprise. All Sage system administrators also have administrator permissions in SQL Server for the Sage Timberline Enterprise instance.
Requires additional resources for each added instance on the computer. Consider using the default instance if application performance is a concern.
Requires that all SQL applications running on that instance be compatible with SQL Server 2008 Service Pack 1.

## Install SQL Server 2008

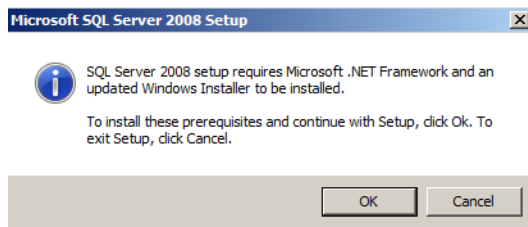
1. Insert the SQL Server 2008 DVD. The installation should start automatically. If it does not, browse to the DVD drive and double-click **Setup.exe**.
2. If you see a message about known compatibility issues, click **Run program**. (This message simply reminds you to install Service Pack 1, which you will do as part of this procedure.)



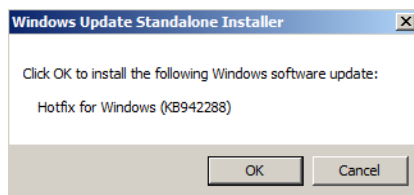
3. If you are asked to install prerequisites, click **OK** for each message about prerequisites.



**NOTE:** You may need to download some prerequisites to install them. The downloads are available from [www.microsoft.com](http://www.microsoft.com).



4. If you are prompted to install Windows updates, click **OK**.



5. If you are prompted to restart the computer after installing updates, close any open programs and click **Restart Now** before continuing.



- After restarting the computer, double-click **Setup.exe** again. The **SQL Server Installation** window opens.

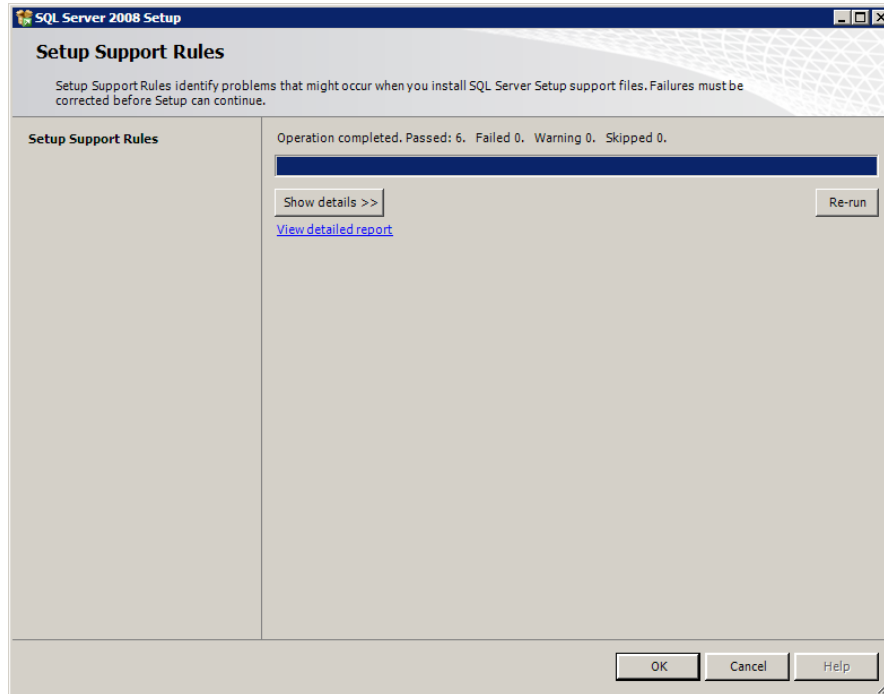


- In the left panel, click **Installation**.



- Click **New SQL Server stand-alone installation or add features to an existing installation**.

9. If you see the message about known compatibility messages again, click **Run program**.
10. The **Setup Support Rules** window is displayed. If any problems appear here, they must be corrected before you can continue. If the operation completes successfully, click **OK**.



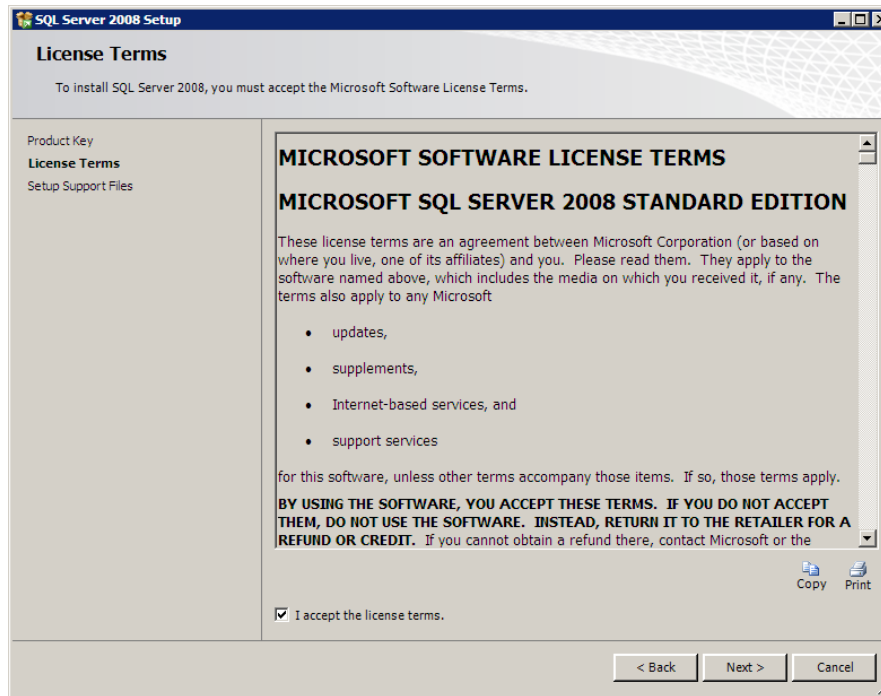
11. In the **Product key** window, enter the product key for your SQL Server software, and then click **Next**.



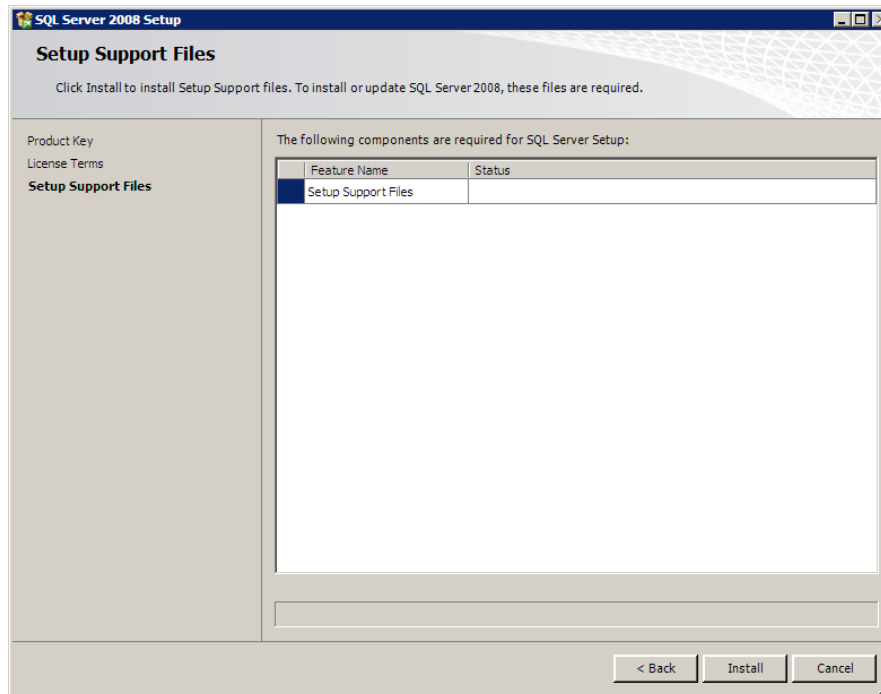
**NOTE:** Your product key may already be present if you obtained SQL Server as part of a bundle with Sage Timberline Enterprise.

The screenshot shows the 'SQL Server 2008 Setup' window with the 'Product Key' tab selected. The window title is 'SQL Server 2008 Setup'. The main heading is 'Product Key' with the instruction 'Specify the edition of SQL Server 2008 to install.' Below this, there are two columns. The left column contains links for 'Product Key', 'License Terms', and 'Setup Support Files'. The right column contains instructions: 'Specify a free edition of SQL Server or provide a SQL Server product key to validate this instance of SQL Server 2008. Enter the 25-character key from the Microsoft certificate of authenticity or product packaging. If you specify Enterprise Evaluation, the instance will be activated with a 180-day expiration. To upgrade from one edition to another edition, run the Edition Upgrade Wizard.' There are two radio button options: 'Specify a free edition:' with a dropdown menu showing 'Enterprise Evaluation', and 'Enter the product key:' with an empty text input field. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

12. In the **License Terms** window, click **I accept the license terms**, and then click **Next**.



13. In the **Setup Support Files** window, click **Install**.

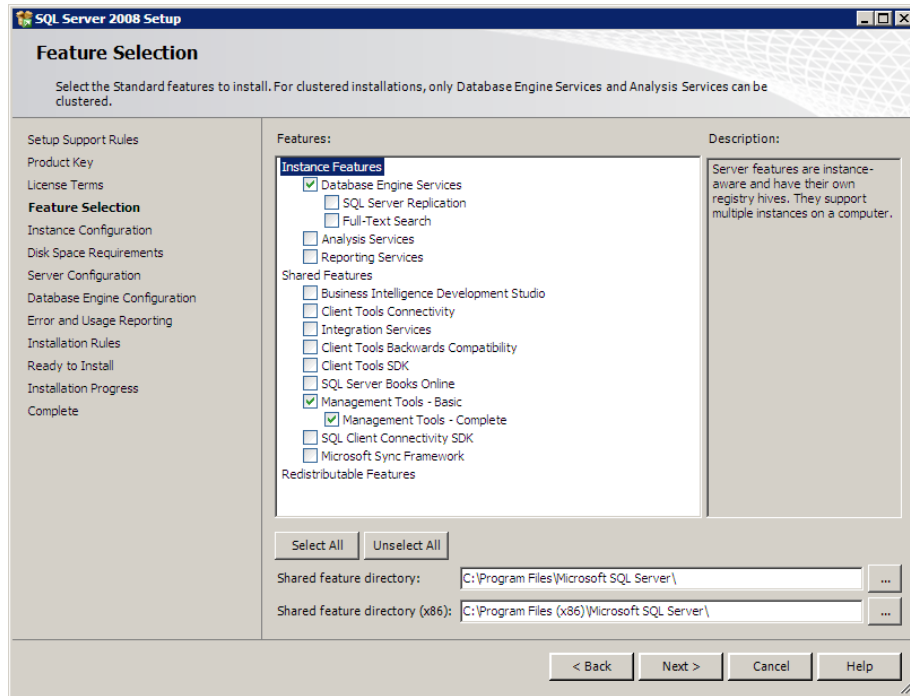


**NOTE:** If you see a warning about the firewall, see “Verify your Firewall Settings” on page 22.

14. Click **Next** to proceed to the **Feature Selection** window. Select **Database Engine Services**, **Management Tools - Basic**, and **Management Tools - Complete**, as shown here:



**NOTE:** You can select additional features if you wish. The features shown are the minimum required.



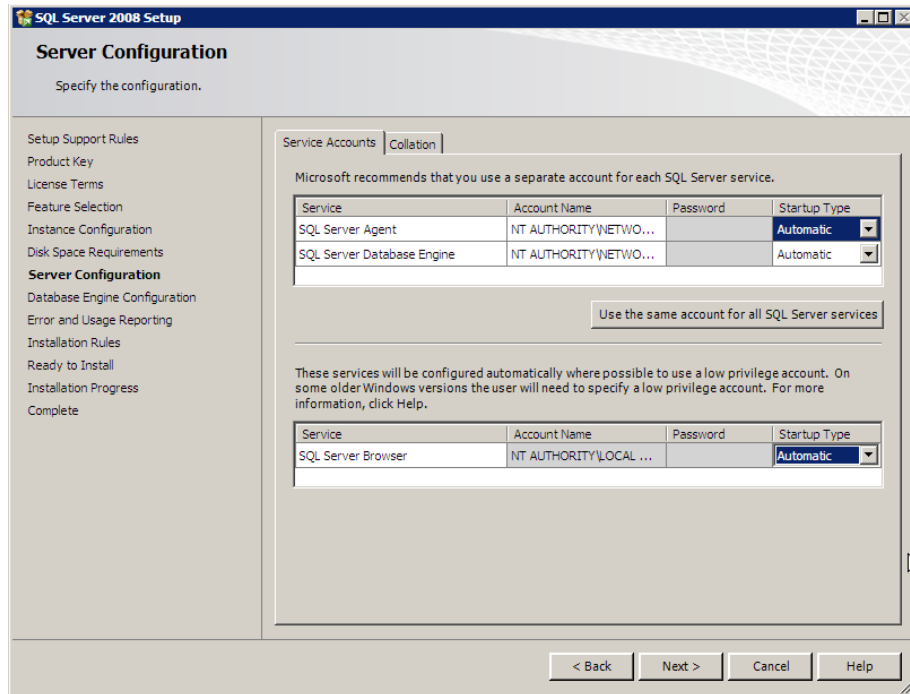
15. Click **Next** to proceed to the **Instance Configuration** window, and select either **Default instance** or **Named instance**. If you select a named instance, type an instance name (up to 16 characters and beginning with a letter).



**NOTE:** If you are unsure whether to use a default or named instance, see “Decide Which SQL Server Instance You Will Use” on page 23.

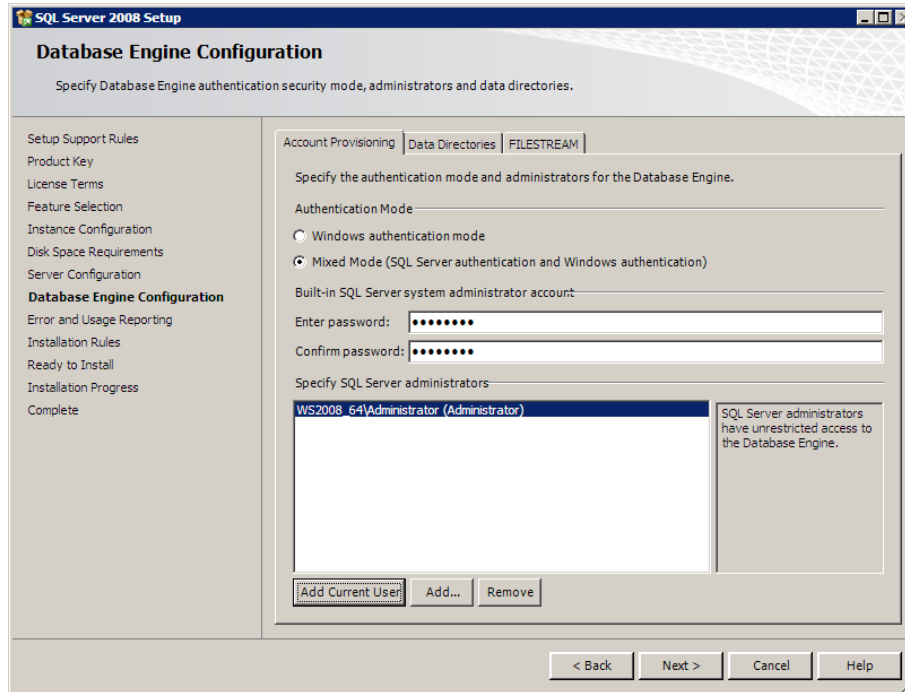
16. Click **Next** to proceed to the **Disk Space Requirements** window.

- Click **Next** to proceed to the **Server Configuration** window.



- Click **Use the same account for all SQL Server services**.
- Select the **Account Name** of **NT Authority\Network Service** and click **OK**.
- Verify that each service shows a **Startup Type** of **Automatic**.
- Click **Next** to proceed to the **Database Configuration** window.

22. Select **Mixed Mode (SQL Server authentication and Windows authentication)**.



23. Enter a password for the built-in SQL Server system administrator account.



**WARNING:** Make note of this password, as you must have it in order to perform administrative functions within SQL Server.

24. Click **Add Current User** to add yourself as a SQL Server administrator. To add additional users, click **Add** and enter the names. Your Sage system administrators must also be SQL Server administrators.



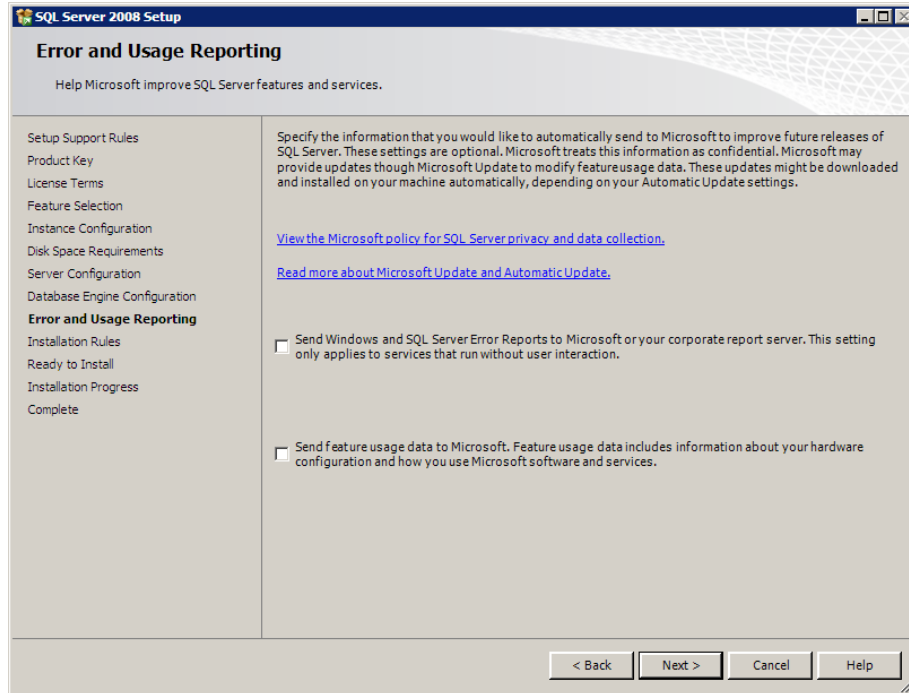
**NOTE:** Consider adding the local administrators group as administrators for this instance. To add this group, click **Add**, type `\\server\Administrators`, and then click **OK**.

25. Click **Next** to proceed to the **Error and Usage Reporting** window.

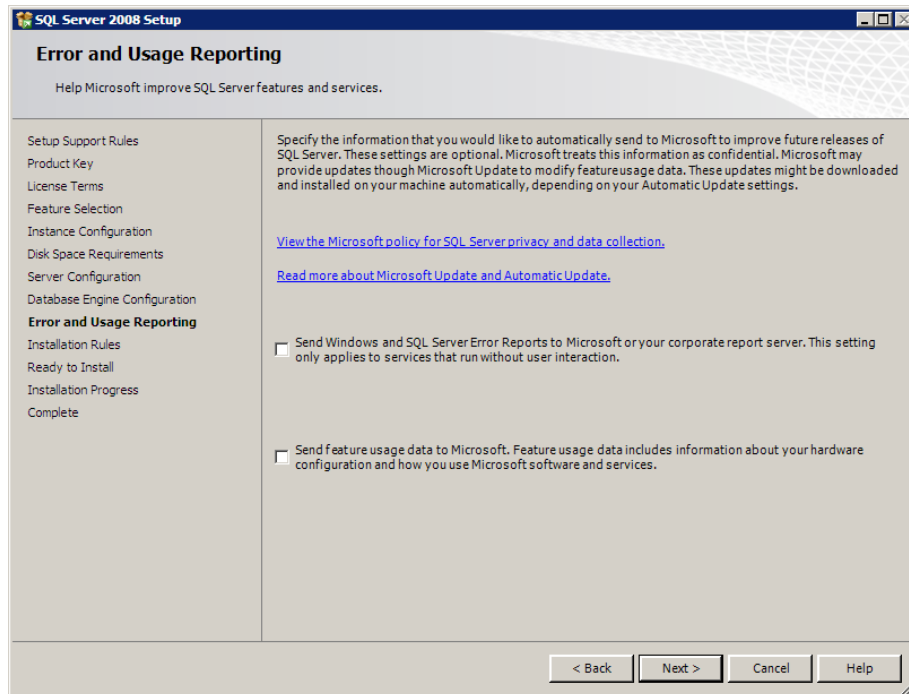




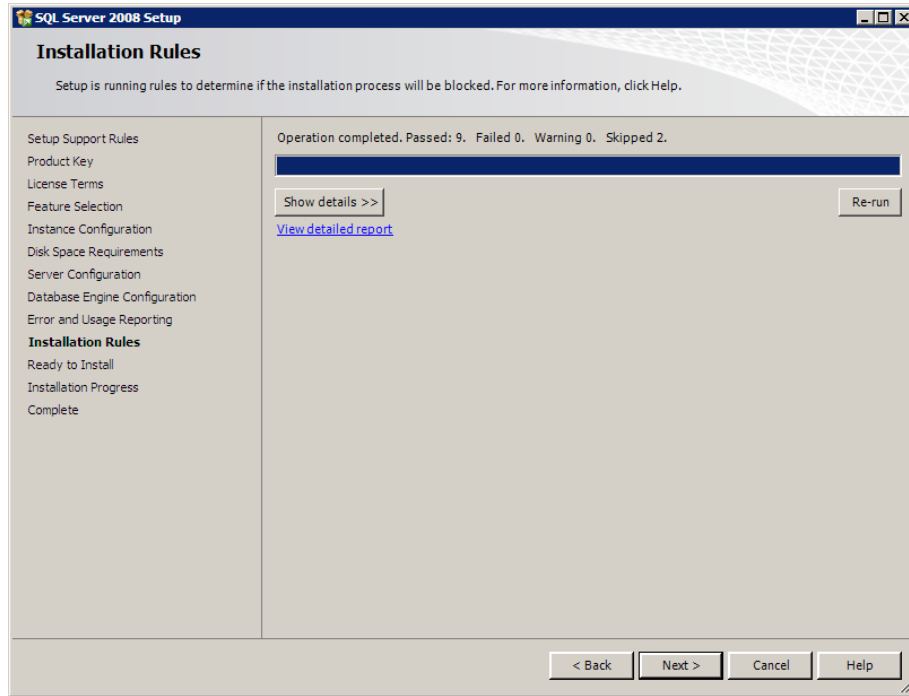
**NOTE:** Depending upon whether you selected other options in step 14, you may see additional screens at this point. Continue through the selections until you see the screen shown here.



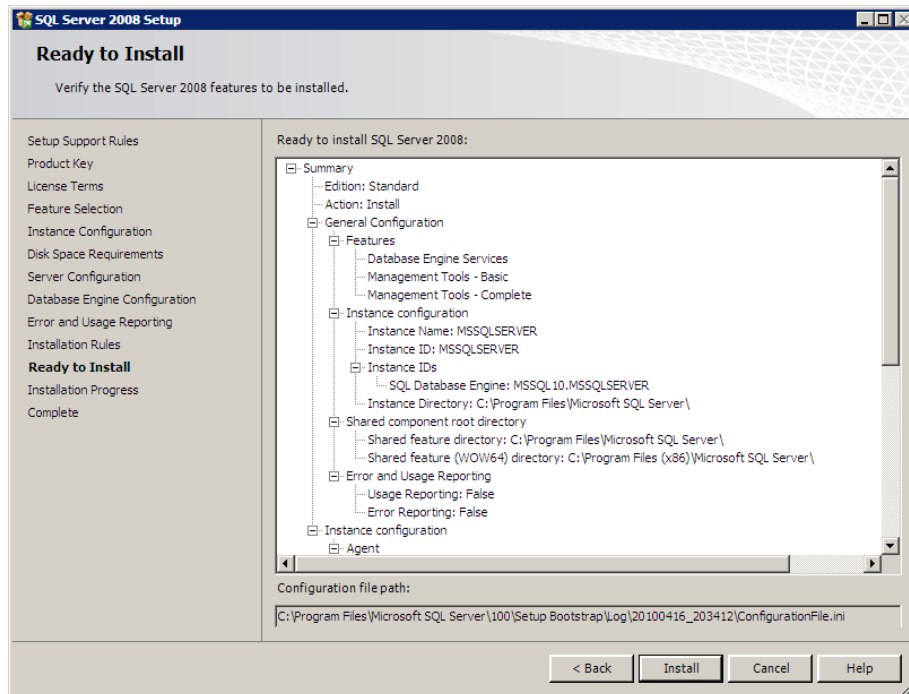
26. Select a reporting option if you want to send reports to Microsoft. Click **Next** to proceed to the **Installation Rules** window.



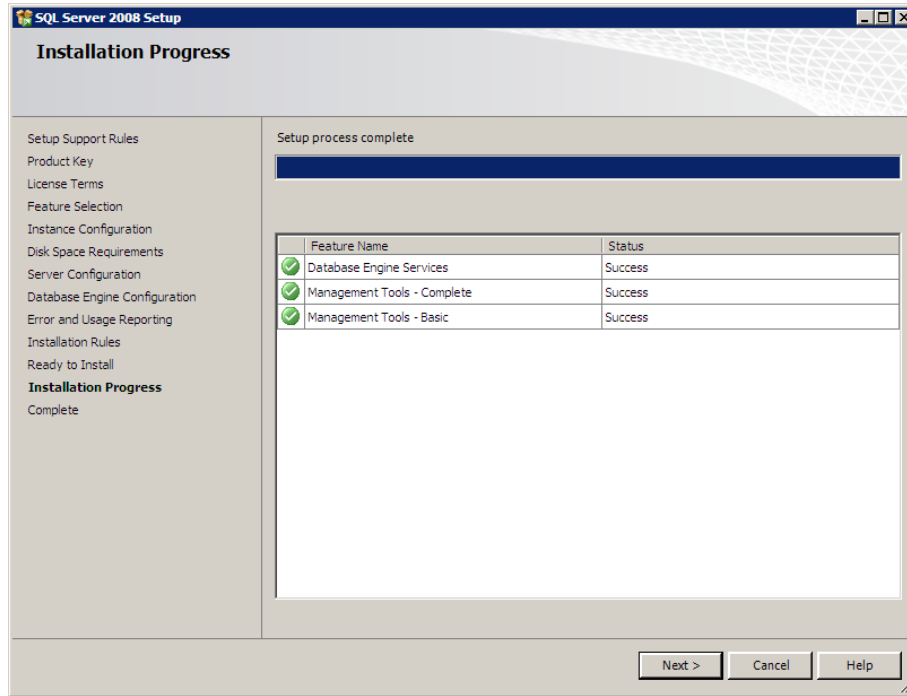
27. Confirm that the installation process will not be blocked, and then click **Next** to proceed to the **Ready to Install** window.



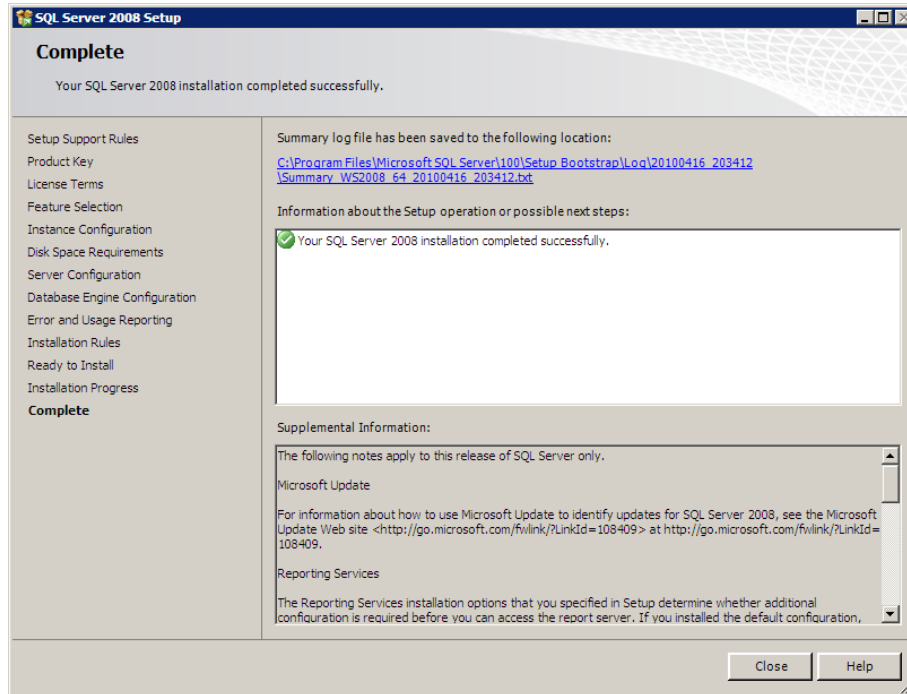
28. Click **Install** to start the installation.



29. When the installation is complete, the **Installation Progress** window shows that it completed successfully.

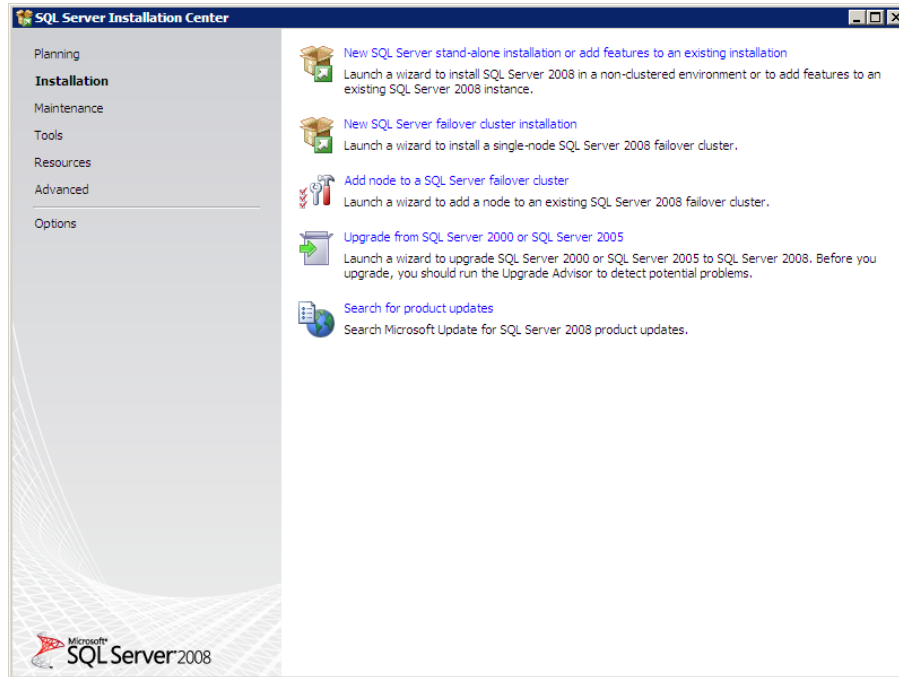


30. Click **Next**.



31. Click **Close**.

32. In the **SQL Server Installation Center** window, select **Search for product updates**.



33. Follow the prompts to install any necessary updates.
34. Restart your computer.

## Install Service Pack 1 for SQL Server 2008

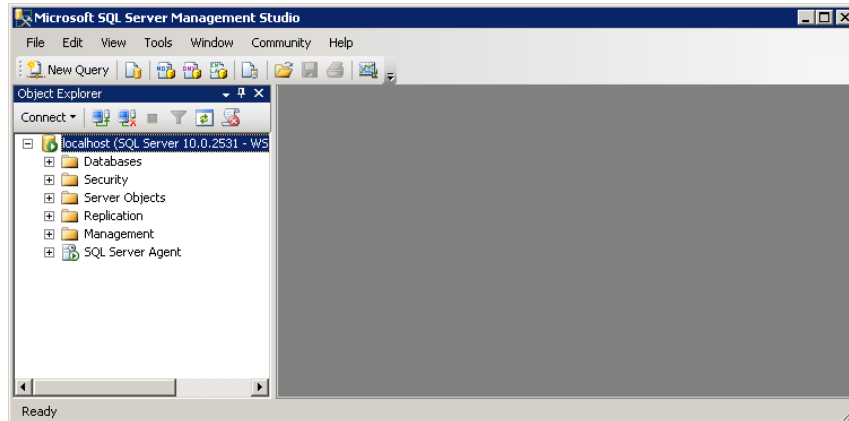
When you run the installation routine for Service Pack 1, the process applies Service Pack 1 only to the instance (named or default) that you specify. If you have more than 1 instance running on your computer, be sure to apply Service Pack 1 to the instance supporting Sage Timberline Enterprise. (You can apply it to other instances as needed.) SQL Server 2008 Service Pack 1 is required to run Sage Timberline Enterprise.

If you installed updates as recommended in the step 33 above, you should already have this service pack installed.

### Confirm That Service Pack 1 is Installed

1. Select **Start > All Programs > Microsoft SQL Server 2008 > SQL Server Management Studio**.
2. In the **Connect to Server** window, enter **Localhost** and click **Connect**.

- The top node of the tree should say **SQL Server 10.0.2531** or greater. If the last number is lower than 2531, install Service Pack 1.



### To Install SQL Server 2008 Service Pack 1

- In Internet Explorer, go to this location:  
<http://www.microsoft.com/downloads/details.aspx?FamilyID=66ab3dbb-bf3e-4f46-9559-ccc6a4f9dc19&displaylang=en>
- Download the appropriate file for your operating system and run it.
- Follow the prompts to install the update.
- After the installation is complete, restart your computer.

### Consider Installing Cumulative Update 7

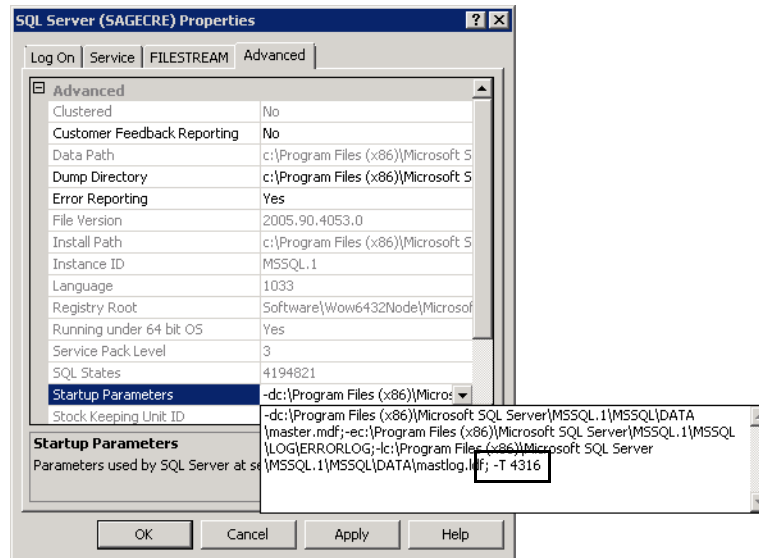
Microsoft periodically issues updates to its software to fix issues or bugs. You might see performance improvement if you install the Cumulative Update 7 for SQL Server 2008 SP1 and configure the SQL Server instance to a parameter switch.

To do this, download and install Cumulative Update 7 from this location:  
<http://support.microsoft.com/hotfix/KBHotfix.aspx?kbnm=979065&kbln=en-us>

Then do the following:

- Open SQL Server Configuration Manager (**Start > All Programs > Microsoft SQL Server 2008 > Configuration Tools > SQL Server Configuration Manager**).
- Click **SQL Server Services**.
- Right-click **SQL Server** properties for the instance running Sage Timberline Enterprise, and select **Properties**.
- Click the **Advanced** tab.

- Next to **Startup Parameters**, scroll to the end of the entry and add the string **;-T 4136** to the end, as shown.

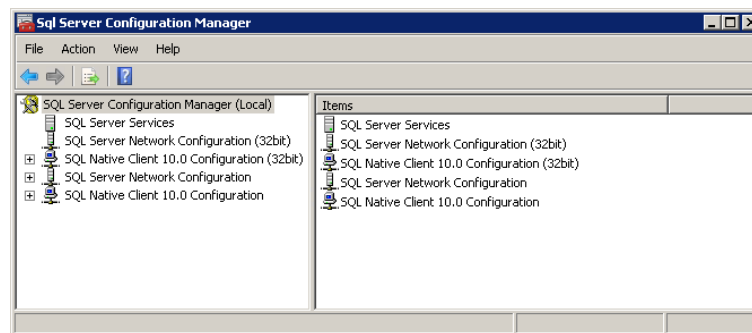


- Click **OK**, and then close SQL Server Configuration Manager.

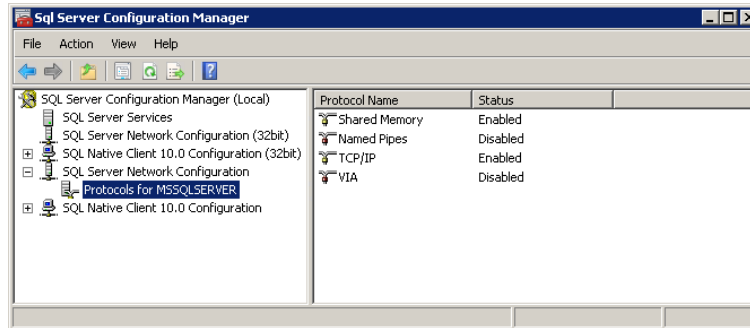
## Configure SQL Server to use TCP/IP

Use this procedure to enable TCP/IP if it is not already enabled.

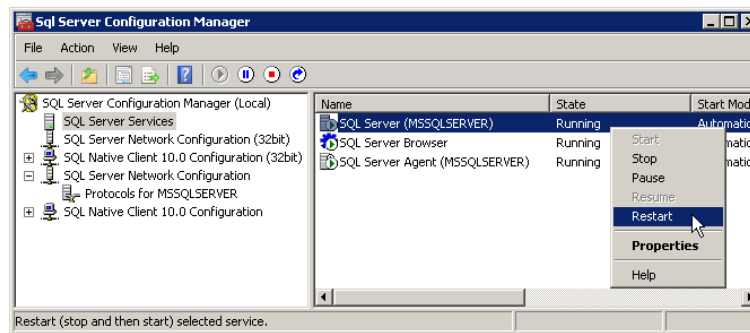
- Select **Start > All Programs > Microsoft SQL Server 2008 > Configuration Tools > SQL Server Configuration Manager**.



- Expand the **SQL Server Network Configuration** node, and select **Protocols for instance name**.



- Ensure that **TCP/IP** is **Enabled**. If it is not enabled, right-click on **TCP/IP** and change the status to **Enabled**.
- If you enabled TCP/IP, restart the service. To do this, select **SQL Server Services**, and for each of the services listed, right-click and select **Restart**.



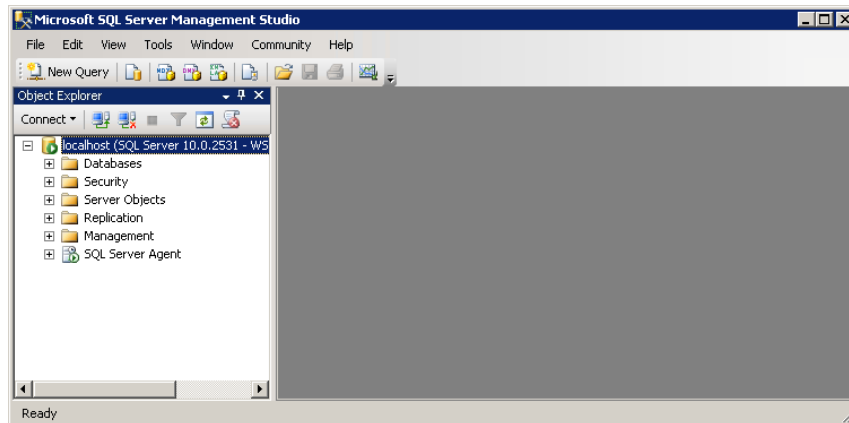
- Verify that the **SQL Server Browser** service is running. If it is not running, right-click it and select **Start**.

## Configure the SQL Server Default Database Location

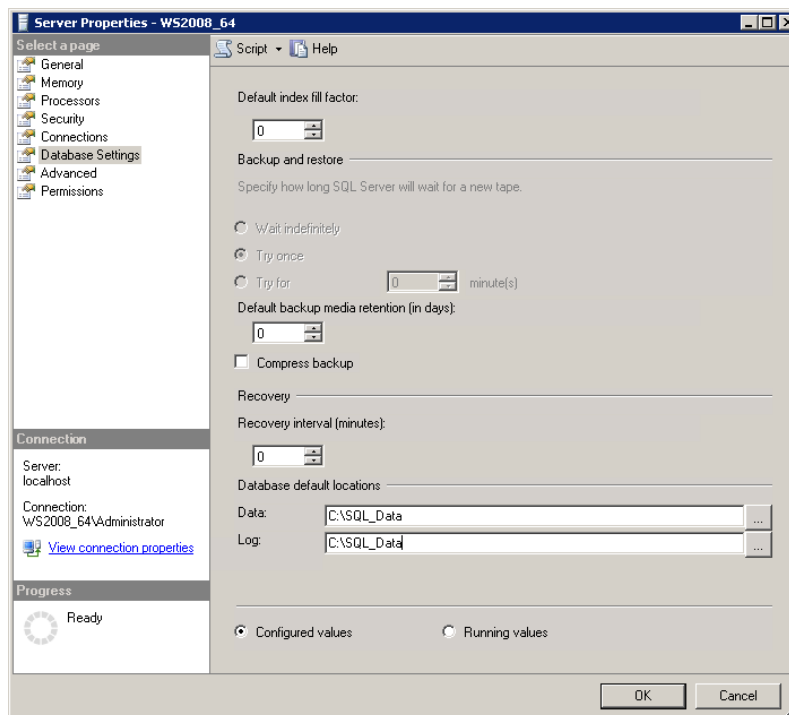
Once you have installed SQL Server, you must configure the default database location for the instance that will run Sage Timberline Enterprise.

- Select **Start > All Programs > Microsoft SQL Server > SQL Server Management Studio** and connect to the server.

- Right-click the top-level node where your SQL Server instance appears, and then select **Properties**.



- In the **Server Properties** window, select **Database Settings**.



- Under **Database default locations**, select the default data and log folders that you set up in the section “Default Data and Log Folder.”



**WARNING:** Do not leave these locations set to the default entries unless you have verified that those folders are present and the necessary access has been set up.)

- Click **OK** to save your changes.



## Configure SQL Server Memory Usage (Optional)

By default, SQL Server uses all available memory. If you need to limit the amount of memory available to SQL Server, while still in the **Server Properties** window, click the **Memory** page and select the maximum server memory (in megabytes) that you want to allow.



# Install and Configure IIS

Internet Information Services (IIS) are Internet-based services for servers. These services must be installed and configured on the server that will hold the Sage Timberline Enterprise server installation. If you plan to install Sage Timberline Enterprise on a different server than Microsoft SQL Server, install IIS on the server with Sage Timberline Enterprise.

IIS must be set up to be compatible with IIS 6.0.

Depending upon your system configuration, the steps to set up IIS vary. Follow the steps in this guide carefully to ensure that your server is set up correctly.

- Install IIS 7.0 on Windows Server 2008 or 2008 R2—page 43.
- Install IIS 6.0 on Windows Server 2003 or 2003 R2—page 44.

IIS and ASP.NET are features of Microsoft products. For more information, see [www.iis.net](http://www.iis.net) or [www.microsoft.com](http://www.microsoft.com).

## Log On as Administrator

In order to install IIS, log on to the computer that will hold the server installation of Sage Timberline Enterprise with the built-in Administrator account, or use the "run as" command at the command prompt. Members of the local administrators group do not have the necessary administrative privileges to perform these steps.

## Install IIS 7.0 on Windows Server 2008 or 2008 R2

### Install IIS by Adding the Web Server (IIS) Role

1. Select **Start > Administrative Tools**.
2. Do one of the following:
  - If you are logged in as the administrator, select **Server Manager**.
  - If you are not logged in as administrator, right-click on **Server Manager** and select **Run as administrator**. Enter your administrator name and password, and then click **Yes**.
3. Right-click **Roles** and select **Add Roles**.
4. In the **Roles** wizard, click **Next** to proceed to the list of server roles that can be added.
5. Select **Web Server (IIS)** and **Application Server**.
6. Click **Install**.

## Add the Role Service

1. Select **Start > Administrative Tools**.
2. Select **Server Manager**. (If you are not logged in as administrator, right-click **Server Manager** and select **Run as administrator**.)
3. Expand the **Roles** node on the tree, and select **Web Server (IIS)**.
4. Right-click **Web Server (IIS)** and select **Add Role Services**. Select the following:
  - **Application Development:** ASP.NET, ASP
  - **Security:** Windows Authentication
  - **Management Tools:** IIS 6 Management Compatibility
5. Click **Next**.
6. Click **Install**.

## Reset IIS

1. Select **Start > All Programs > Accessories**.
2. Right-click on **Command Prompt** and select **Run as administrator**.
3. When asked if you want to allow the program to make changes, click **Yes**.
4. Type **IISRESET** and then press ENTER.
5. Close the command prompt window.

## Install IIS 6.0 on Windows Server 2003 or 2003 R2

### Install IIS and ASP.NET

1. Select **Start > Control Panel > Add or Remove Programs**.
2. Click **Add/Remove Windows Components**.
3. Select **Application Server**.
4. Click **Details**.
5. Select **ASP.NET**. Notice that **Enable network COM+ access** and **Internet Information Services (IIS)** are selected automatically.
6. Click **OK**.
7. Click **Next**.
8. Click **Finish**.

### Confirm the status of ASP.NET

1. Select **Start > Administrative Tools > Internet Information Services (IIS) Manager**.
2. Expand the folder for your server and then select **Web Service Extensions**.
3. Under **Web Service Extension**, verify that ASP.NET v2.0 05727 has a status of **Allowed**.
4. Close the **Internet Information Services (IIS) Manager** window.

### Register ASP.NET and reset IIS

1. Select **Start > Run**.
2. Type **CMD** in the **Open** box, and then click **OK** to open the command prompt.
3. Type **C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet\_regiis -i** and then press ENTER. Confirm that ASP.NET is registered properly.
4. At the command prompt, type **IISRESET** and then press ENTER.
5. Close the command prompt window.

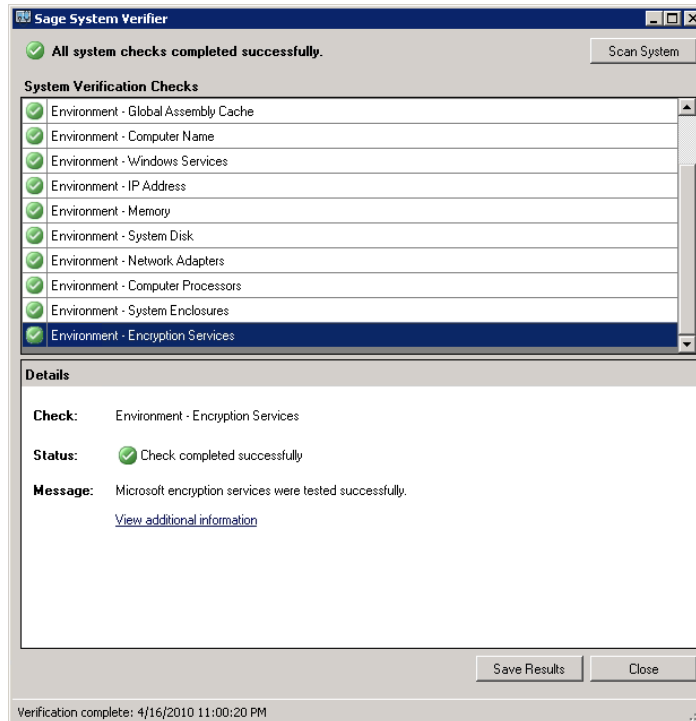


# Install Sage Timberline Enterprise on the Server

1. Insert your Sage Timberline Enterprise installation DVD at the server. In the **Setup and Installation** window, click **Perform system verification**.

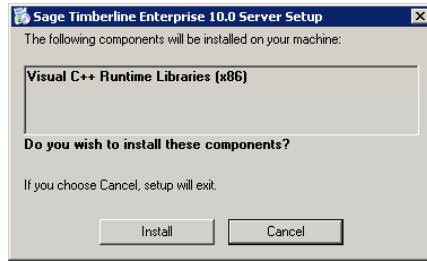


2. In the **Sage System Verifier** window, click **Scan System**.

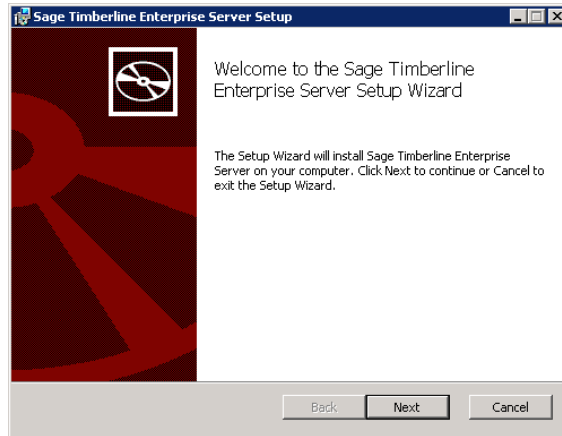


3. If any issues are found, you must address them before you can continue with the installation. The **Details** section of the window provides information about issue resolution. If no issues are found, click **Close**.
4. In the **Setup and Installation** window, under **Install**, click **Server components and tools**.

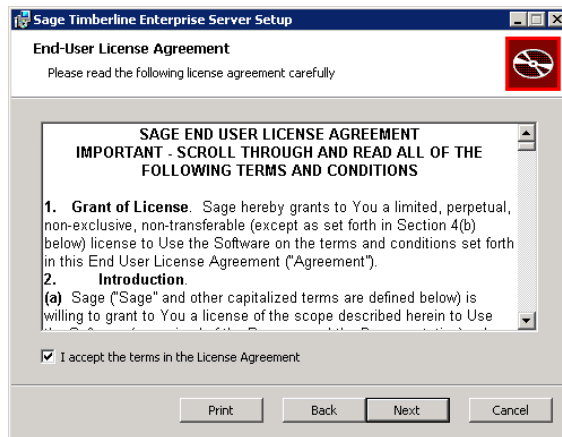
5. You may be asked to install prerequisites. Click **Install** to install each prerequisite.



6. In the Sage Timberline Enterprise Server Setup window, click **Next**.

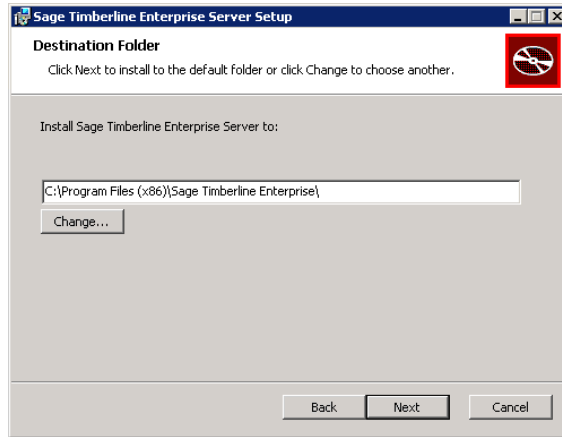


7. In the End-User License Agreement window, select **I accept the terms in the License Agreement**, and then click **Next**.

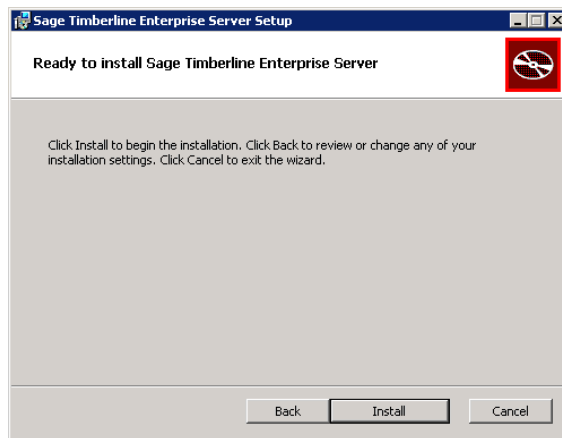




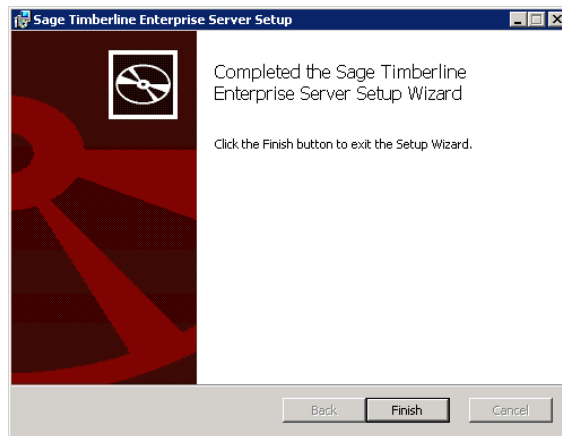
- In the **Destination Folder** window, select the installation destination to which you want to install the software, and then click **Next**.



- In the **Ready to install Sage Timberline Enterprise Server** window, click **Install**.



- When the setup wizard completes the installation, click **Finish**.



# Install Payroll on the Server

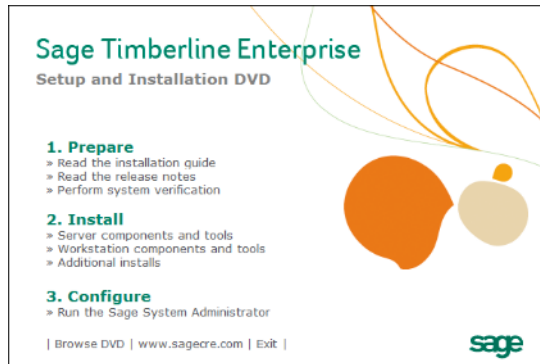
Payroll is an optional module that you can use with Sage Timberline Enterprise. Payroll uses a Pervasive.SQL database, rather than a SQL Server database.

1. At the server, insert your Sage Timberline Enterprise installation DVD.

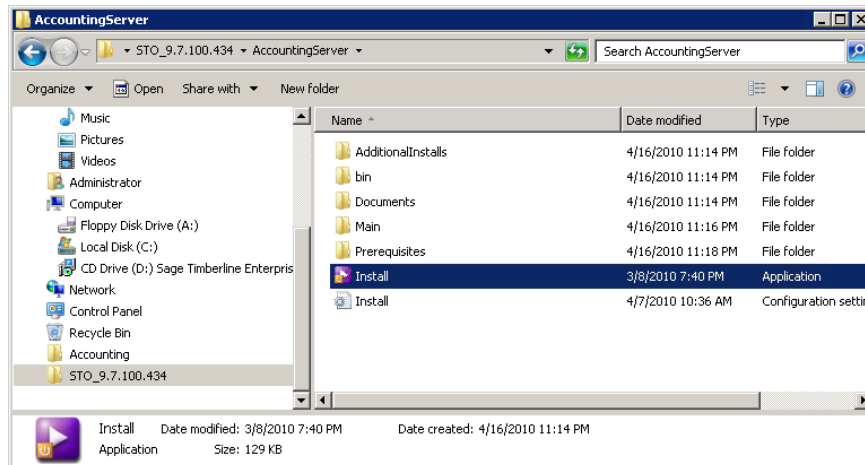


**NOTE:** Payroll cannot be installed from a network location.

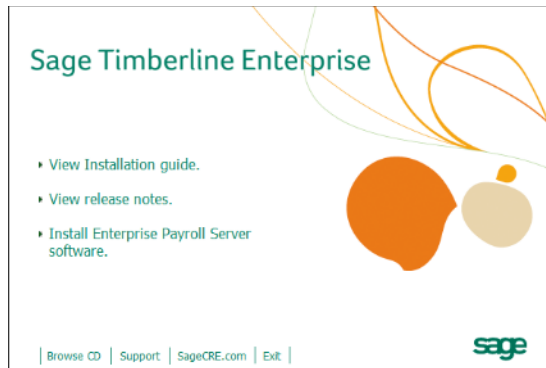
2. In the **Setup and Installation** window, under **Install**, select **Additional Installs**.



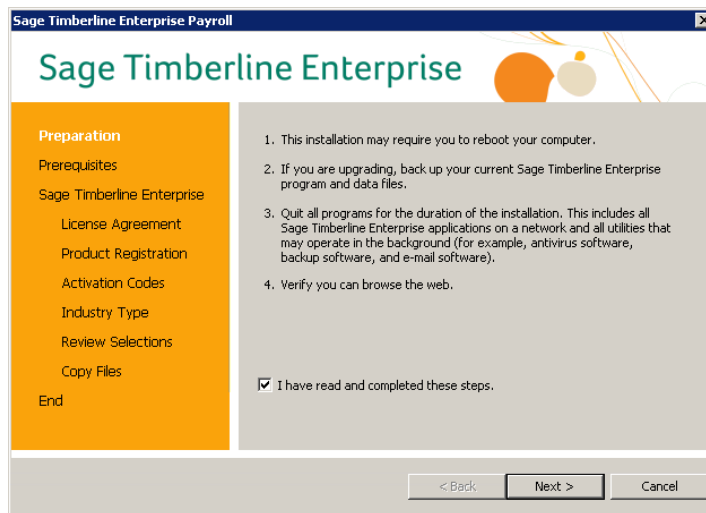
3. Open the **STE Payroll** folder.



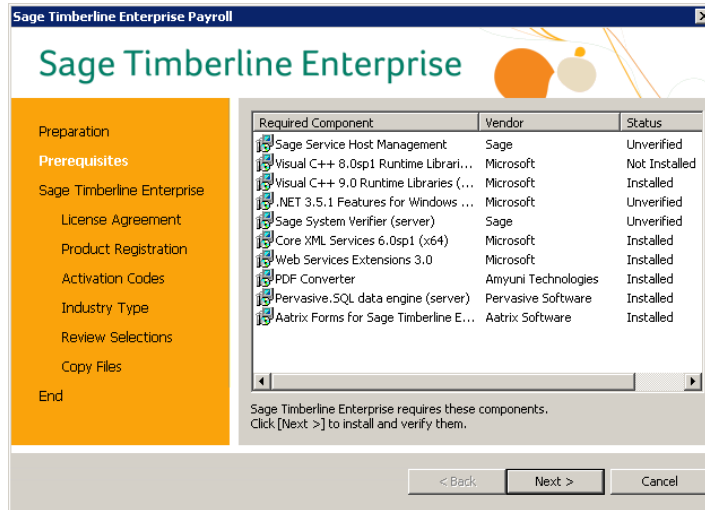
4. Open the **AccountingServer** folder, and then double-click **Install.exe**.



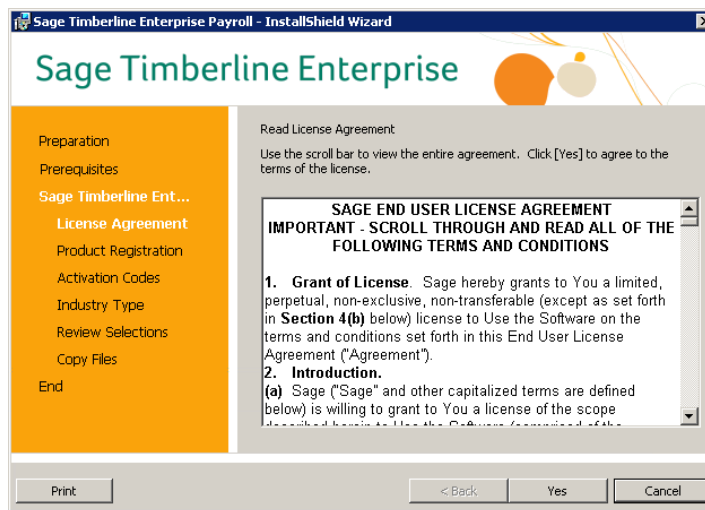
5. Click **Install Enterprise Payroll Server software**.
6. Read and perform the steps listed in the **Preparation** window. Select **I have read and completed these steps**, and then click **Next**.



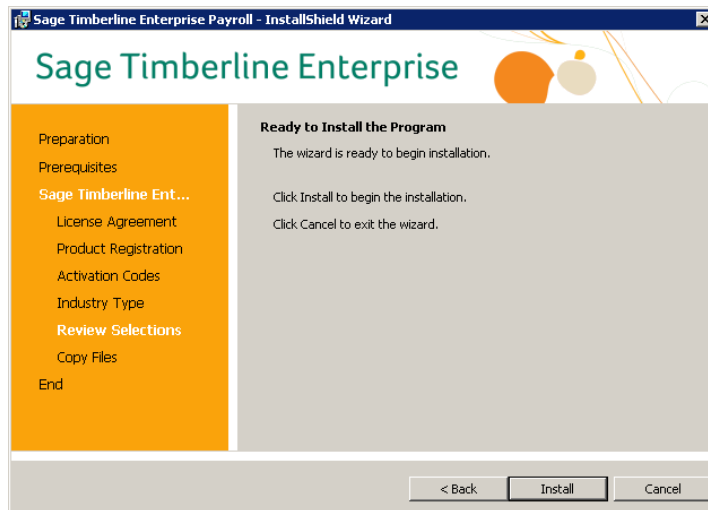
7. In the **Prerequisites** window, you can view the status of the additional software that is required to run Payroll. Click **Next** to continue.



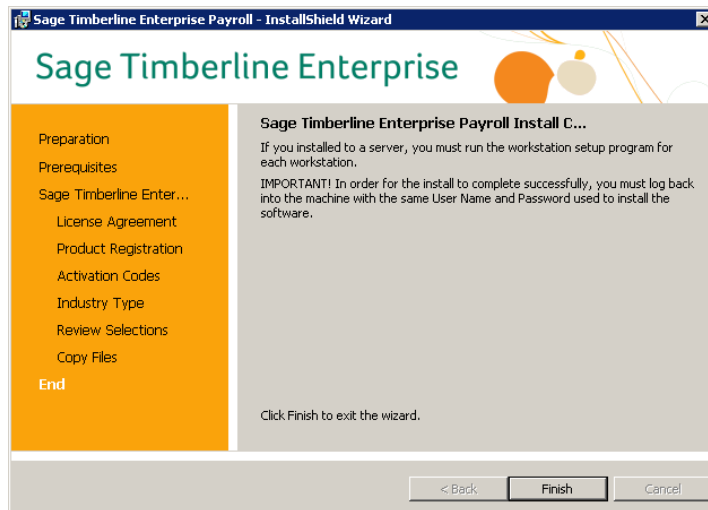
8. In the **License Agreement** window, click **Yes** to agree to the terms of the software.



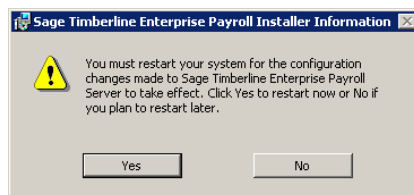
9. In the **Ready to Install the Program** window, click **Install**.



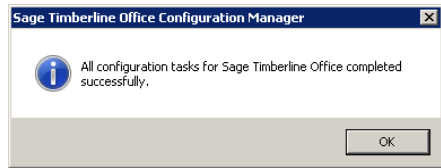
10. When the installation is complete, click **Finish**.



11. A message tells you that you must restart your computer. Click **Yes**.



12. After the computer restarts, the **Sage Configuration Manager** starts automatically to complete security upgrades. Wait for the process to finish, and then click **OK**.

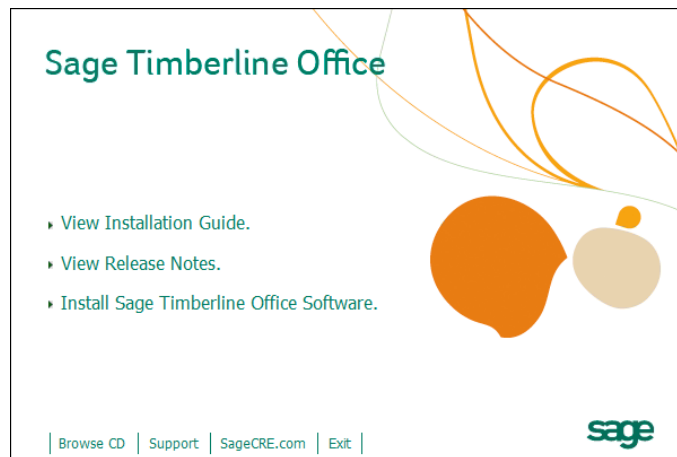


# Install Sage Timberline Estimating

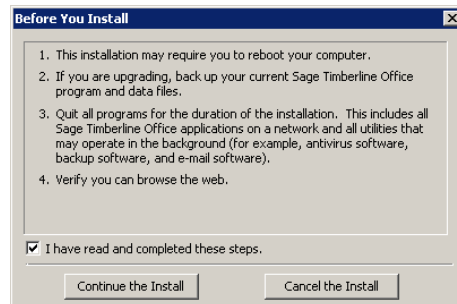
You can integrate Sage Timberline Enterprise with Estimating and then send your estimates to Job Management, where you monitor progress against each job.

You can install the Sage Timberline Estimating application on the server, or you can install only the databases. If you do not plan to use the application directly at the server, install only the databases. To install only the databases, follow this procedure through step 4.

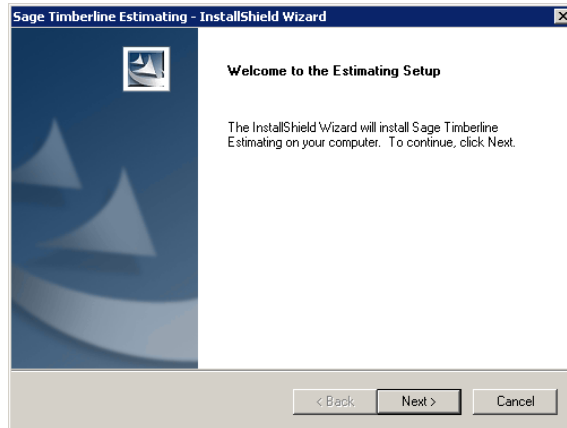
1. Insert the Estimating DVD. In the setup window, click **Install Sage Timberline Office Software**.



2. In the **Before You Install** window, select the **I have read and completed these steps** check box, and then click **Continue the Install**.

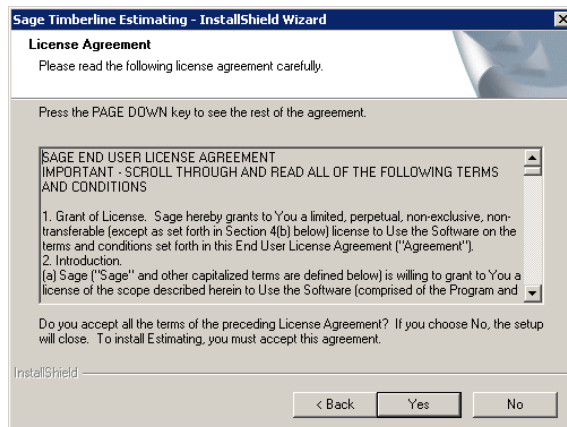


3. In the **Requirements Checklist** window, click **Start**. Once the prerequisites are installed, the installation is prepared.



**NOTE:** If you see a system verification error indicating that your target platform failed verification, please contact Sage for assistance.

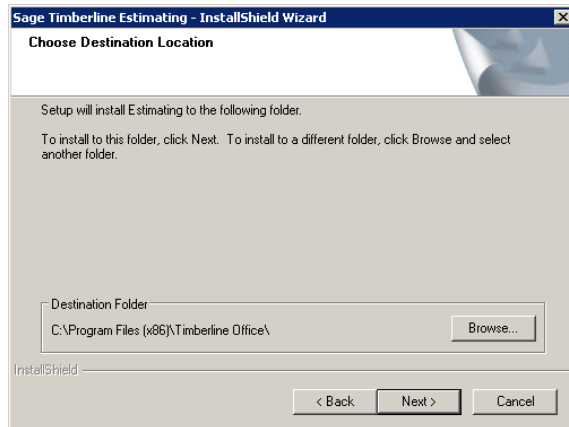
4. If you are installing only the databases at this time, click **Cancel**—you are finished installing the databases. Otherwise, click **Next**.



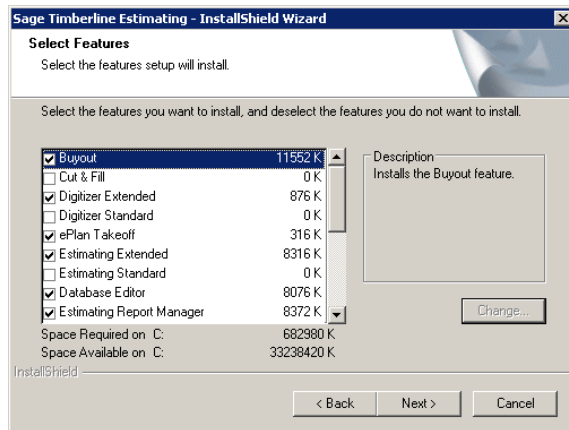
5. In the **License Agreement** window, click **Yes**.



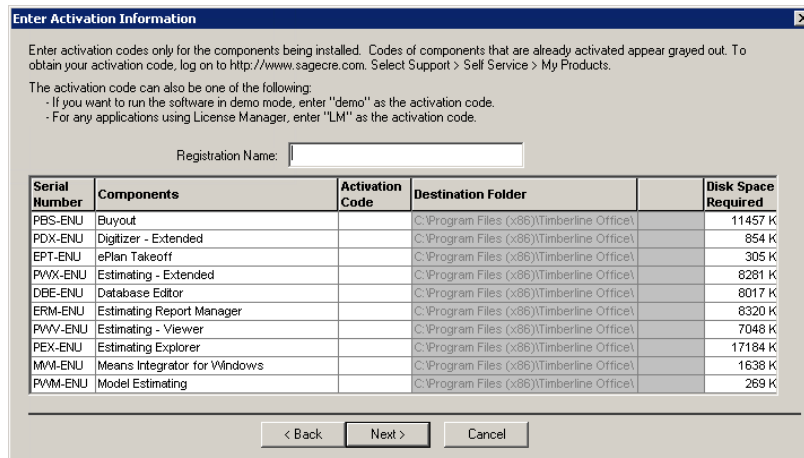
6. In the **Choose Destination Location** window, click **Next**.



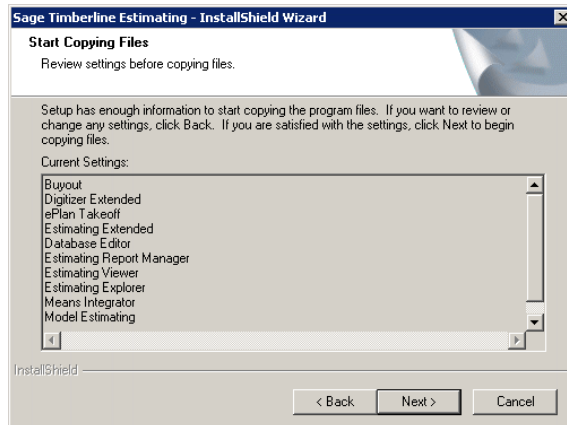
7. In the **Select Features** window, select the Estimating applications you want to install.



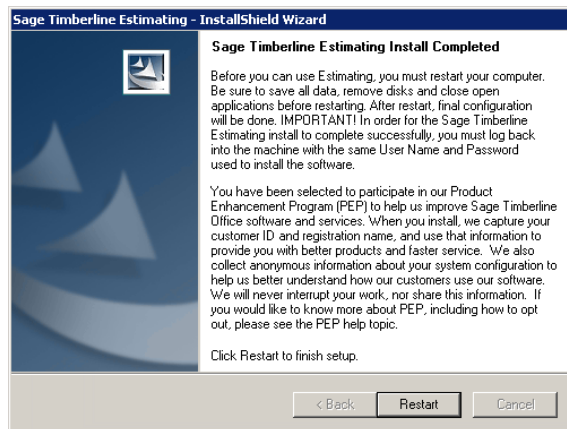
8. Click **Next**, and enter your activation codes from the list that you received with the software. (If you plan to use License Manager, some applications have License Manager codes. Type **LM** in in this window for those applications. Instructions for installing License Manager start on page 59.)



9. Click **Next**.



10. Click **Next**. The product installation takes a few moments.



11. When the installation is finished, restart your computer and wait for the configuration tasks to finish.
12. Select **Start > Programs > Sage > Sage System Verifier**, and then click **Scan System**.
13. Once the scan is finished, close the window.
14. Before you can open Estimating and configure it to work with Job Management, you'll need to configure your licensing.
  - If you will use License Manager to manage your Estimating licenses, continue with "Install License Manager" on the next page.
  - If you will not use License Manager, attach the Sentinel protection device to the computer's parallel or USB port before you open Estimating. (If you are using a parallel port, first remove any devices connected to the parallel port. Attach the protection device to the parallel port and then reconnect your other devices to the back of the protection device.)

## Install License Manager

License Manager lets you set up a greater number of Estimating workstations than you have licenses, and then manages concurrent uses for you. License Manager consists of the following components:

- Sentinel protection device
- Sentinel System Driver
- License Manager application
- Estimating Licenses

### Attach the Protection Device to the License Server

The License Manager protection device is a piece of hardware that you connect to the parallel port or USB port on the license server. This device authorizes License Manager to distribute licenses to clients.

1. If you are using a protection device on a parallel port, remove any devices connected to the parallel port.
2. Attach the protection device to the parallel port to the available USB port. Reconnect any parallel devices to the back of the protection device.

### Install the Sentinel Driver on the License Server

The Sentinel driver provides communication between the license server and a license-managed application through the protection device. You must install the Sentinel driver on the license server (it is installed automatically if you install Estimating). To install the driver:

1. At the computer designated as the License Manager server, insert the DVD and browse to the folder **X:\Prerequisites\Safenet** (where X: represents your DVD-ROM drive).
2. Double-click **Sentinel Protection Installer 7.6.1.exe** and complete the installation.
3. Restart the computer when the installation finishes.

### Install License Manager on the License Server



**NOTE:** When you first install License Manager on the server, the server and all workstations that will use Estimating must be on the same subnet. After you install License Manager you can move workstations to a different subnet if you need to. For more information, check the Sentinel License Manager help for instructions.

1. At the computer designated as the License Manager server, insert the DVD and log on as the local administrator.

2. Browse to the folder **X:\AdditionalInstalls\LicenseManager\Server\Setup** (where X: represents your DVD-ROM drive).
3. Double-click **Setup.exe** and complete the installation wizard.
4. Restart the computer when the installation finishes.
5. Open Estimating on a workstation to verify that License Manager is configured properly.

## Install Estimating Licenses on the License Server

Install your license codes on the license server.

1. Verify that the License Manager service is running> Select **Start > Control Panel > Administrative Tools > Services** and then select **Sentinel RMS License Manager**. The status of the service should be **Started**.
2. Start the WLMAdmin utility as follows:
  - If License Manager Tools have been installed, select **Start > Programs > Timberline Office > Estimating > License Manager Utilities > WLMAdmin**.
  - If License Manager Tools have not been installed, insert the Estimating DVD and double-click **X:\additionalinstalls\LicenseManager\Admin.net\Win32\WLMAdmin.exe** (where X:\ represents your DVD-ROM drive).
3. Click to expand **Subnet Servers**.
4. If you are installing license codes from a file:
  - a. Right-click the License Manager server, and select **Add Feature > From a File > To Server and its File**.
  - b. Browse to the License Manager code file, select it, and click **OK**.
5. If you are installing license codes from a string:
  - a. Right-click the License Manager server, and select **Add Feature > From a String**.
  - b. Select the **Add feature to server's file** check box.
  - c. Type a code from the packing slip that you received with your software, and then click **Add**.
  - d. Continue adding codes until all codes have been entered.

## Work With Commuter Licenses

Use the utility called WCommute to check licenses in or out.

- If License Manager Tools have been installed, select **Start > Programs > Sage Software > Sage Timberline Office > Estimating > License Manager Utilities > Commuter License Manager**.
- If License Manager Tools have not been installed, insert the Estimating DVD and double-click the file  
X:\additionalinstalls\licensemanager\Admin.net\Win32\wcommute.exe (where X:\ represents your DVD-ROM drive).



**NOTE:** See the License Manager Help topic called “Using WCommute” for further instructions.

## Configure Estimating for Use with Enterprise Job Management

Once you have installed Estimating, configure the interface with Sage Timberline Enterprise Job Management.

1. Open Estimating Tools (**Start > Programs > Sage > Sage Timberline Office > Estimating > Estimating Tools**).
2. Select **Setup > Change Job Cost Information**.
3. Select the Estimating database that you want to use with Sage Timberline Enterprise.
4. In the **Job Cost Interface Type** field, select **Sage Timberline Enterprise**.
5. Click **OK**. The database is configured.



# Server Configuration

This section shows you how to configure your licenses, databases, and users in Sage System Administration once you have installed all of the server components described in the last section. Complete the tasks in this section in order for best results:

- In Sage System Administration, run the Configuration Wizard (page 64).
- Activate your Sage Timberline Enterprise licenses (page 71).
- Set up the sample database (page 73).
- Develop and implement a Sage Timberline Enterprise security plan (page 81).

# Configure Sage System Administration

After you install Sage Timberline Enterprise, you must configure the Sage System Administration settings by running the Configuration Wizard.

## Important Points about the Configuration Wizard

The wizard starts automatically the first time you start Sage System Administration. To run the Configuration Wizard successfully:

- You must first be set up as a system administrator in SQL Server.
- You must run the Configuration Wizard at the server on which you installed Sage Timberline Enterprise and the Internet Information Services. (Although you can open System Administration from a workstation, you must complete this procedure at the server.)

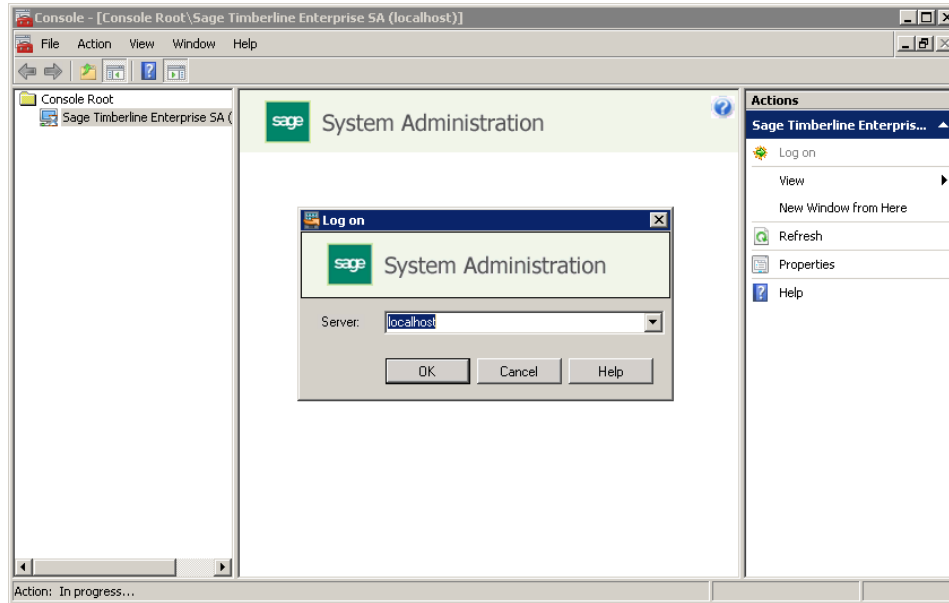
## Run the Configuration Wizard

1. Open Sage System Administration by selecting **Start > All Programs > Sage > Sage System Administration.**)

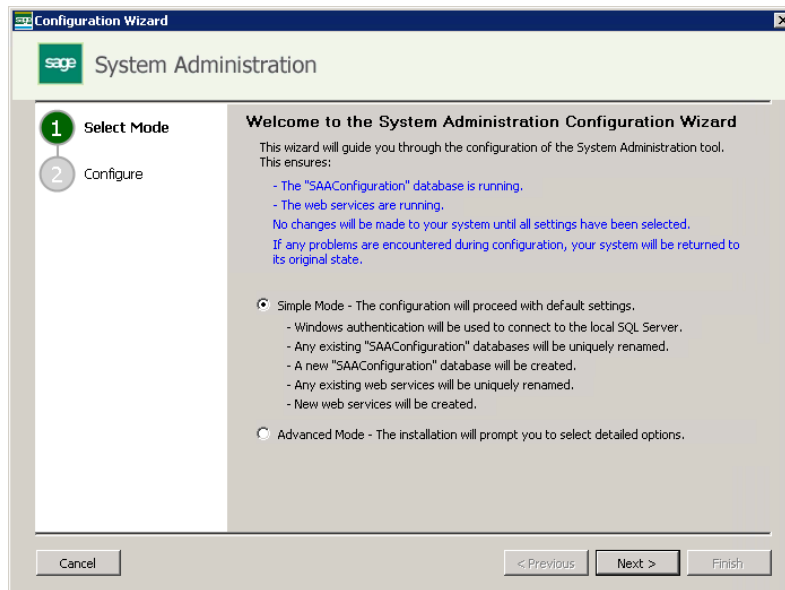




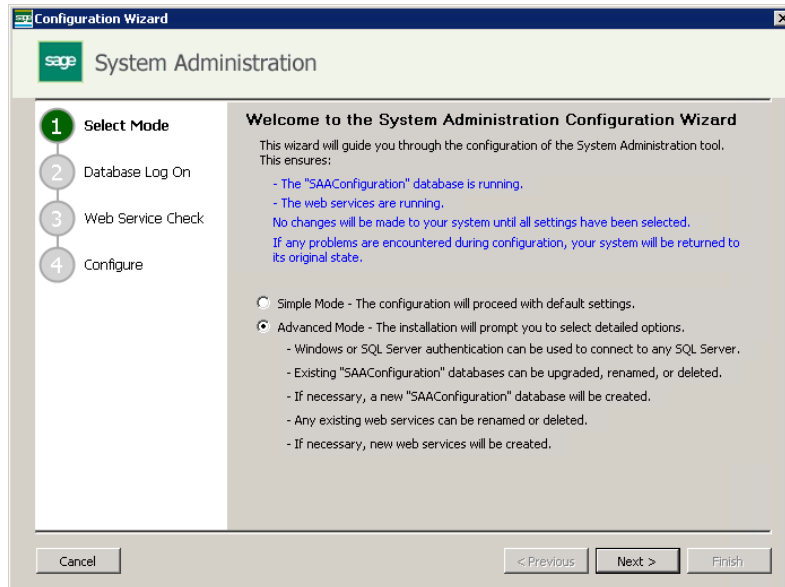
- When the window opens, click the **Sage Timberline Enterprise SA** node to bring up the **Log on** window.



- In the **Log on** window, type the name of the Web server (for example, **localhost**), and then click **OK**.
- In the **Select Mode** window, choose the mode in which you want to configure your Sage System Administration software.
  - If you installed SQL Server using the default instance, you can select **Simple Mode** to set up Sage System Administration with the most common configuration options.



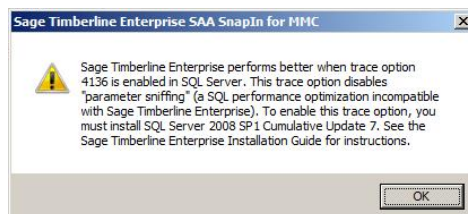
- If you installed SQL Server using a named instance, you must select **Advanced Mode**. This option gives you more control over the configuration process.



5. Click **Next** to continue. A warning message appears regarding SQL Server updates.

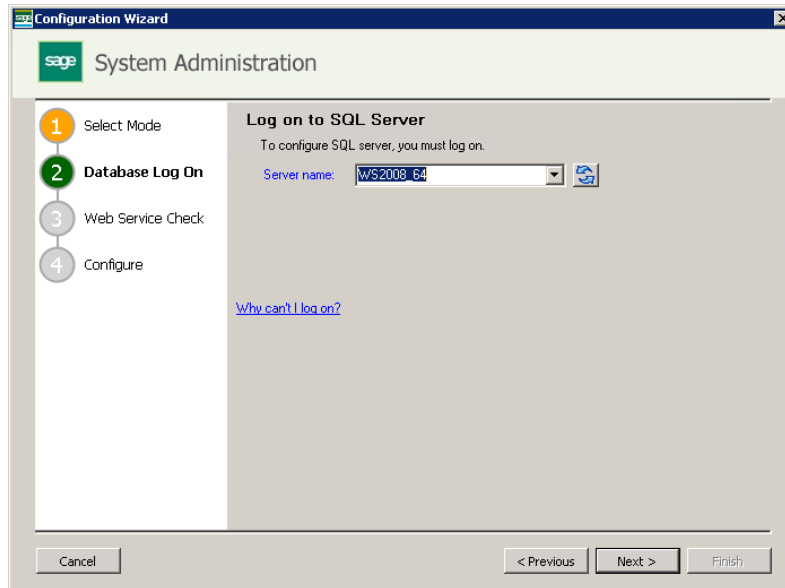


**NOTE:** We recommend that you install SQL Server 2008 SP1 Cumulative Update 7. You can download this update from Microsoft's website.



6. Click **OK**.
  - If you selected **Simple Mode**, click **Configure** and wait for the wizard to finish.

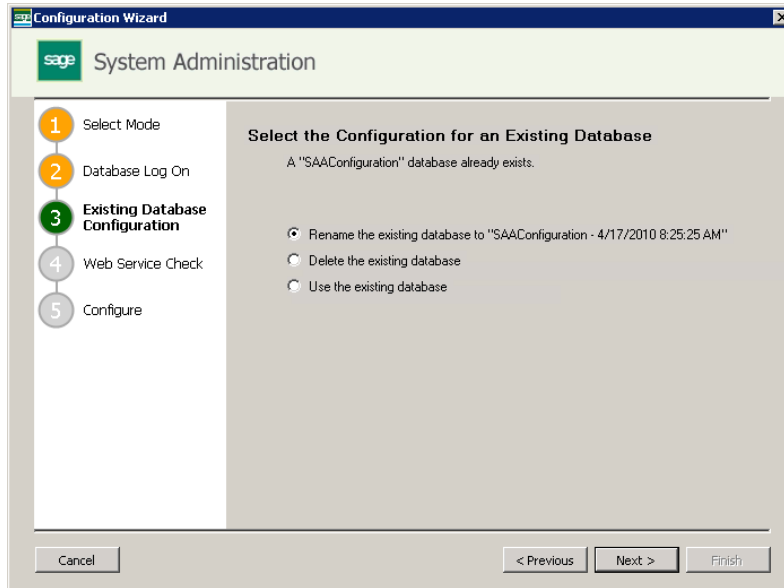
- If you selected **Advanced Mode**, you see the **Database Log On** window. Continue with this procedure.



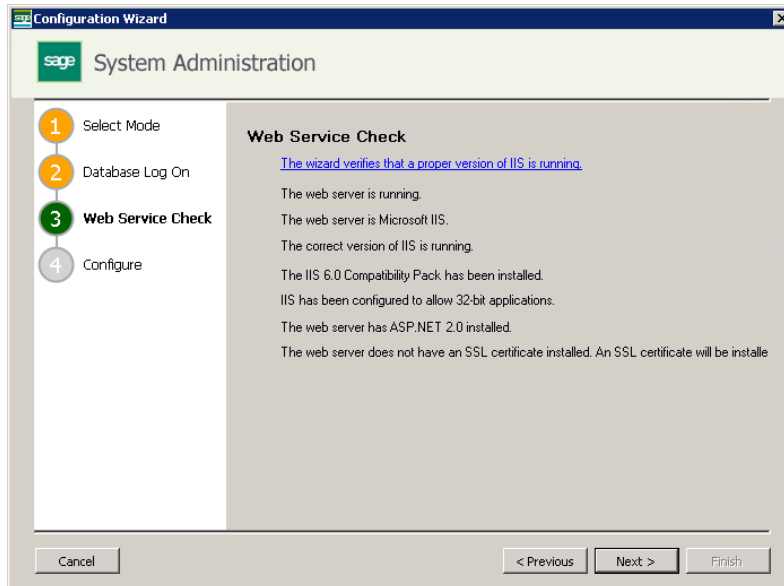
7. In the **Server name** box, select the SQL Server instance that you set up when you installed SQL Server for Sage Timberline Enterprise. Click **Next**.
8. The next window differs based on whether you have had an earlier installation of Sage Timberline Enterprise or run the configuration wizard before.

- If you have had an earlier installation of Sage Timberline Enterprise, or you have run the configuration wizard on this computer before, select the configuration options for the **SAACConfiguration** database.

Select **Rename the existing database** or **Delete the existing database** and click **Next**.



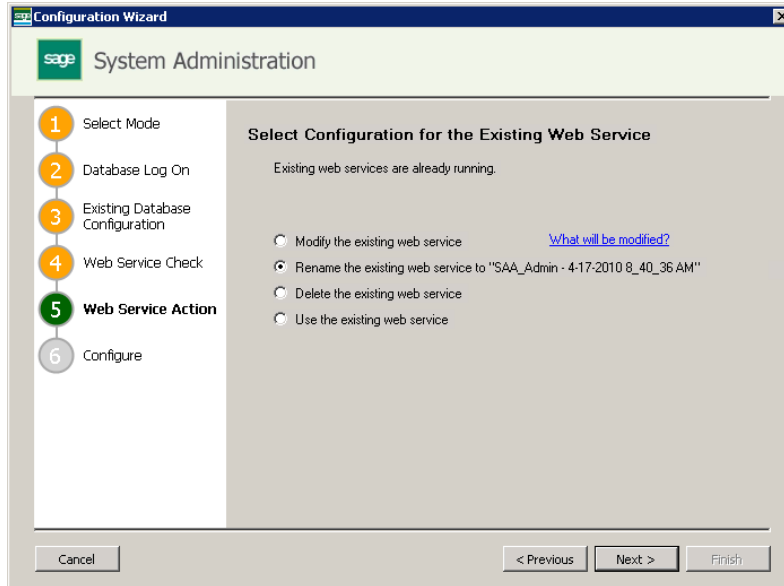
- If you have never run the configuration wizard on this computer before, you see the **Web Services Check** box.



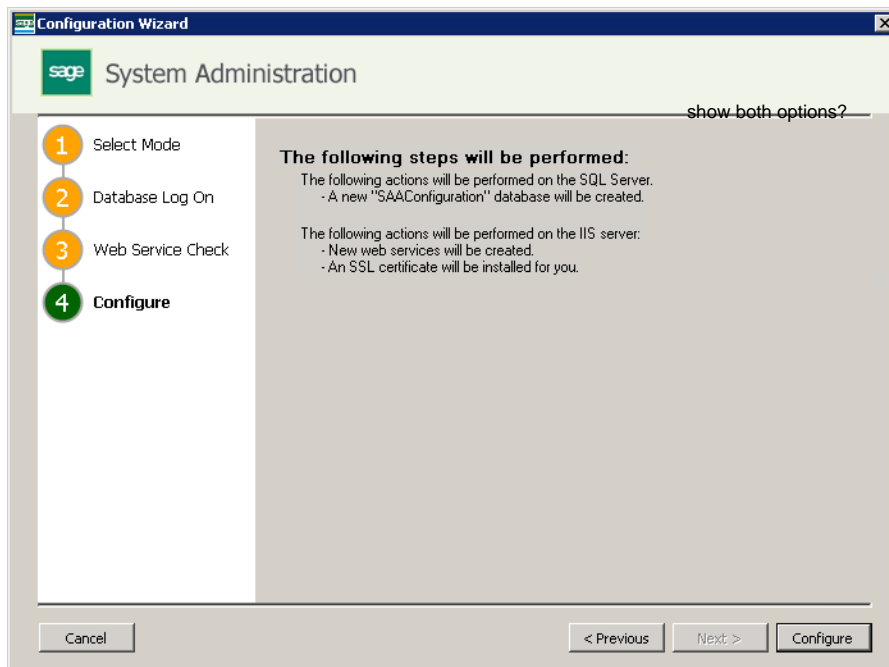
9. In the **Web Service Check** window, click **Next**.
10. The next window again differs based on previous configuration.

- If you have have run the configuration wizard on this computer before, select the configuration options for existing Web Service.

Select **Rename the existing web service** or **Delete the existing web service** and click **Next**.



- If you have never run the configuration wizard on this computer before, you see the **Configure** window.



11. In the **Configure** window, click **Configure**.

12. When the process is finished, the web service connection is established and you are logged on to the System Administration server again.

# Activate Your Sage Timberline Enterprise Licenses

Once you install Sage Timberline Enterprise, you must activate your licenses in order to use the software. You must be connected to the Internet to activate licenses.

Each license has a specific number of associated uses, which are distributed amongst workstations. This section covers the following options for activating licenses and distributing uses:

- Activate licenses on a single server (most common scenario).
- Activate licenses on multiple servers.

## Understand the Default License Activation Process

When your server first connects to Sage to activate licenses, all of your available uses are assigned to that server. (If you use the optional Payroll module, your Payroll licenses are activated at the same time.) If you take no further action, uses remain allocated to that server and other servers will have none available. If you use only one server, this is the appropriate configuration.

However, if you use multiple servers, you must use the multi-server licensing procedure described below to ensure that each of your servers can access Sage Timberline Enterprise.

If you mistakenly allocate all uses to a single server and you need to correct the issue, simply open **License Administration** at the server that has all the licenses and distribute the licenses as needed according to the instructions for multi-server licenses.

## Activate Licenses on a Single Server

In a standard client/server environment, you install Sage Timberline Enterprise on a single server and then activate the server's license. The uses allocated to that license are assigned to each workstation in succession as they connect.

1. In System Administration, select **License Administration**.
2. Click **Edit Registration Information**. Type your client ID exactly as provided to you by Sage.
3. In the **Registration name** box, type the name exactly as provided to you by Sage. The license activation occurs automatically when you enter the information correctly. If you use the optional Payroll module, your Payroll license is activated as well.



**NOTE:** If the client ID and registration name do not exactly match those you received from Sage, the license activation does not succeed.

### How Uses are Distributed in the Single-Server Scenario

If five uses are assigned to your license, the first five workstations to connect to the server are allowed to connect. The sixth workstation that requests simultaneous access is denied.

## Activate Licenses on Multiple Servers

If you have more than one server with the Sage Timberline Enterprise software installed (for example, if you have multiple corporate offices, each with a local server to which users will connect), you can distribute the available uses amongst these servers. Each server assigns only the uses allocated to it.

1. In System Administration, select **License Administration**.
2. In the **Sage client ID** box, type your client ID exactly as provided to you by Sage.
3. In the **Registration name** box, type the name exactly as provided to you by Sage. The license activation occurs automatically when you enter the information correctly. If you use the optional Payroll module, your Payroll license is activated as well.



**NOTE:** If the client ID and registration name do not exactly match those you received from Sage, the license activation does not succeed.

4. Click **Multi-server licensing**.
5. Select **Manually specify license allocations for this server**.
6. Enter the number of uses for this server for each module in the **Uses for server name** column.
7. Click **OK** to allocate the licenses.

### How Uses are Distributed in the Multiple-Server Scenario

If ten uses are assigned to your license, you might allocate five to each of two servers (**Server1** and **Server2**). The first five workstations to connect to **Server1** are allowed to connect. The sixth workstation to try connect to **Server1** is denied. However, it can connect to **Server2** if uses remain available on that server.



## Set Up the Sample Database

Before you can start using Sage Timberline Enterprise, you need to set up your databases, users, and roles. These tasks require you to develop your security plan for the software—which you may not have done yet.

This section gets you started by showing you how to set up a system administrator for Sage Timberline Enterprise, attach the sample database, and give access to a user. When you are ready to develop a complete security plan for your organization, the section “Develop and Implement a Security Plan” starting on page 81 covers all of the details and decisions you’ll want to consider in your plan.



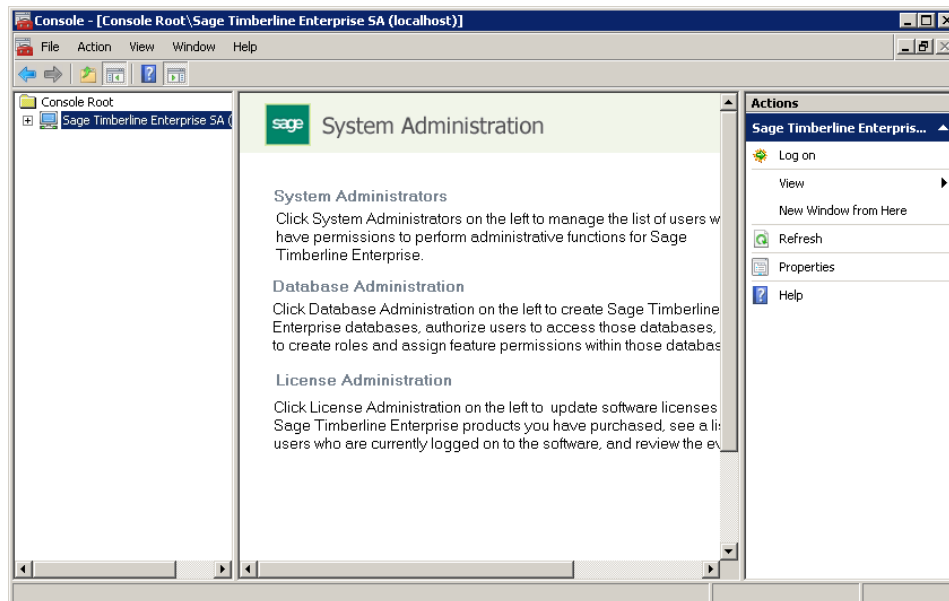
**NOTE:** You can complete the following procedures at the server or at a workstation (if Sage Timberline Enterprise is already installed on the workstation). You must be logged on to Windows as a Sage Timberline Enterprise administrator in order to set up the sample database, users, and roles.

## Set Up a System Administrator

Your first task is to set up a system administrator for Sage Timberline Enterprise. This individual manages the databases, users, and roles for the entire Sage Timberline Enterprise system, and also has administrative permissions for the SQL Server instance on which Sage Timberline Enterprise is installed.

To set up the system administrator, follow these steps:

1. Start Sage System Administration if it is not already open (**Start > All Programs > Sage > Sage System Administration**).

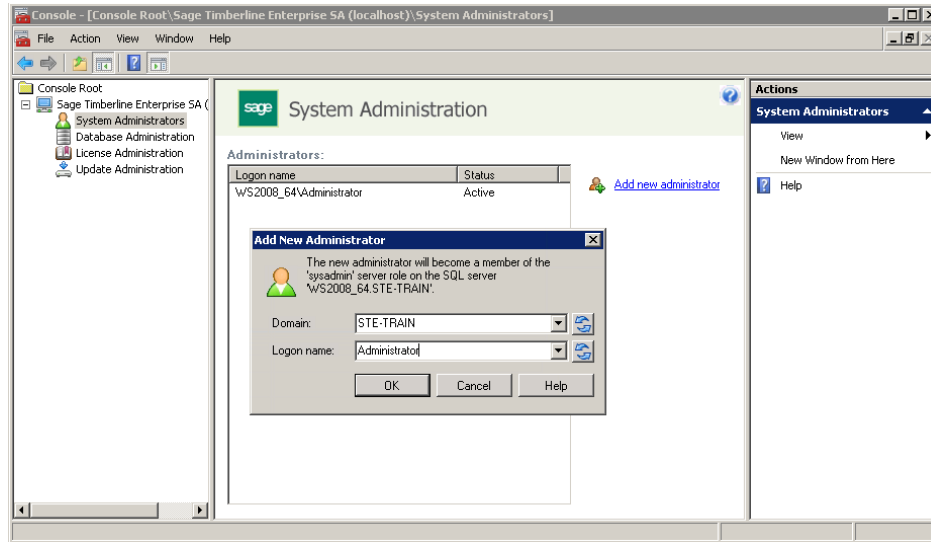


2. Expand the tree on the left and click **System Administrators**.

3. Click **Add new administrator**.



4. Select the **Domain** and **Logon name** for the administrator. Click the **Refresh** button to refresh the list.



5. Leave the **System Administration** window open so you can return to it.

## Attach the Sample Database

The sample database is provided with the software to help you learn its functions and plan your implementation. It is the same database that is used in Sage Timberline Enterprise training classes.

To attach an existing database, you first place the database file in your default data folder and attach it in SQL Server. Then you add the database to Sage System Administration so that you can associate users with it.

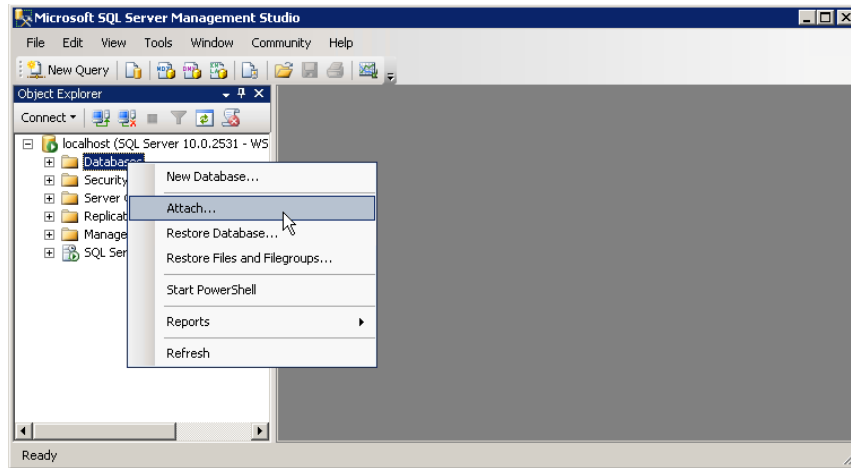
### Move the training data files to the default data folder

1. In Windows Explorer, browse to the location of the training data .mdf file.
2. Move the file to your default data folder (the one you specified when installing SQL Server).

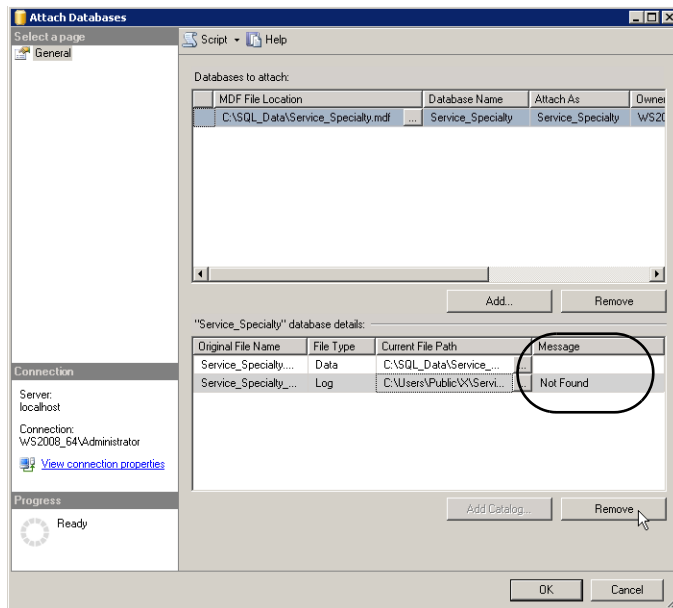
### Attach the database in SQL Server Management Studio

1. Select **Start > All Programs > Microsoft SQL Server 2008 > SQL Server Management Studio**.
2. Verify that the correct server and instance are selected, and then click **Connect** to log on.

3. Right-click the **Databases** folder and select **Attach**.



4. Click **Add**, and then browse to your default data folder.
5. Click the .mdf file for the database you want to attach, and then click **OK**.



6. In the lower grid, if the **Message** column shows **Not Found** for either the data or log folder, click the browse button and browse to your default data and log folder. If you do not have a log (.ldf) file, click the row for the log file and then click **Remove**.
7. Click **OK**. When the window closes you should see the new database in the list.
8. Close SQL Server Management Studio.

## Add the Database to Sage System Administration

1. Open Sage System Administration and log on if it is not already open.
2. Click **Database Administration**.
3. Click **Create New Database**.
4. Enter a display name for the database, and then enter the path to the attachments and spool folders that you created and shared earlier (page 17).



**NOTE:** When you enter the path name, use the format **\\ServerName\FolderName** rather than specifying a drive letter path. The directory must be shared in the folder's **Properties**.

5. Next to server, enter the server and the SQL Server instance name in the format **ServerName\InstanceName**.
6. Next to **Database Name**, click the refresh button and select the database from the list.
7. If you have installed or upgraded the optional Payroll module, complete these steps to link to the correct Payroll database. Otherwise, click **OK**.
  - a. Click the **Payroll settings** tab.

- b. Select the **Enable Payroll** check box.

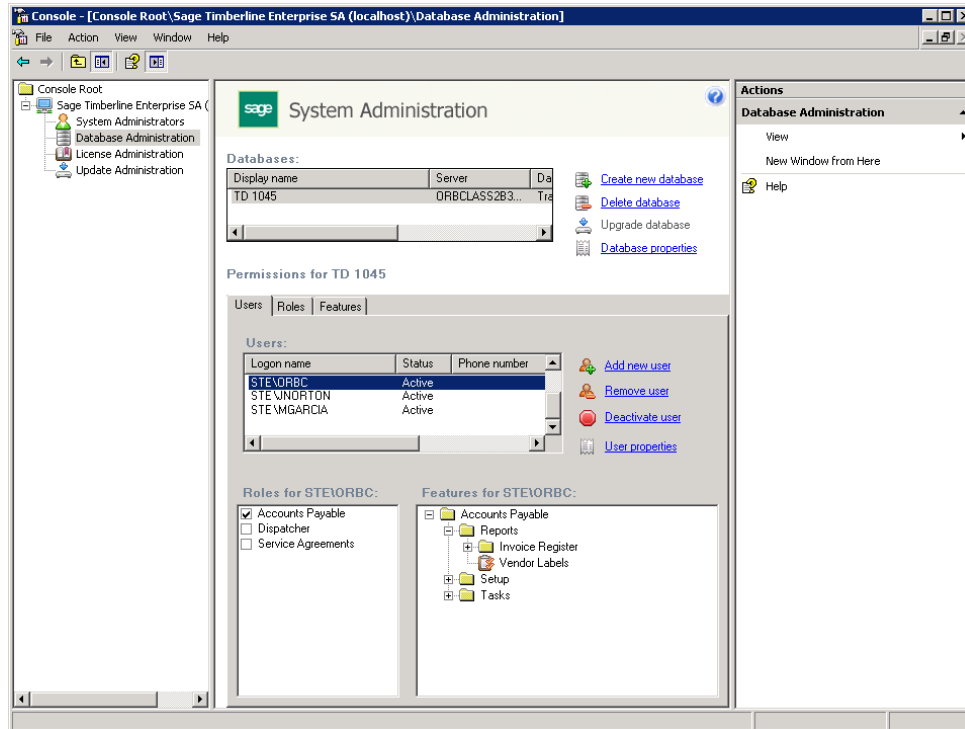
- c. From the **Database** list, select the Payroll database you want to associate with this company database.
  - d. If you are using security in Payroll, enter the **User name** and **Password** needed to log into the secure database.
8. Click **OK**. Note that before you can use the database, you must add at least one user and one role.

## Add a User and a Role to the Database

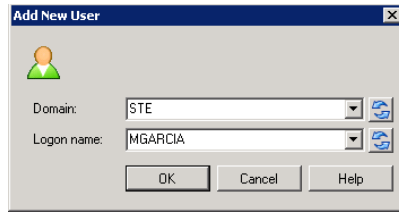
You must add at least one user and one role to the database in order to begin using Sage Timberline Enterprise. You add users using their Windows domain logon name.

### Add a User

1. In System Administration, click **Database Administration**.
2. Under **Databases**, select the database.



3. On the **Users** tab, click **Add new user**.



4. Your domain should already be selected. Type the user logon name or click the **Refresh** button to select from a list of domain users, and then click **OK**.

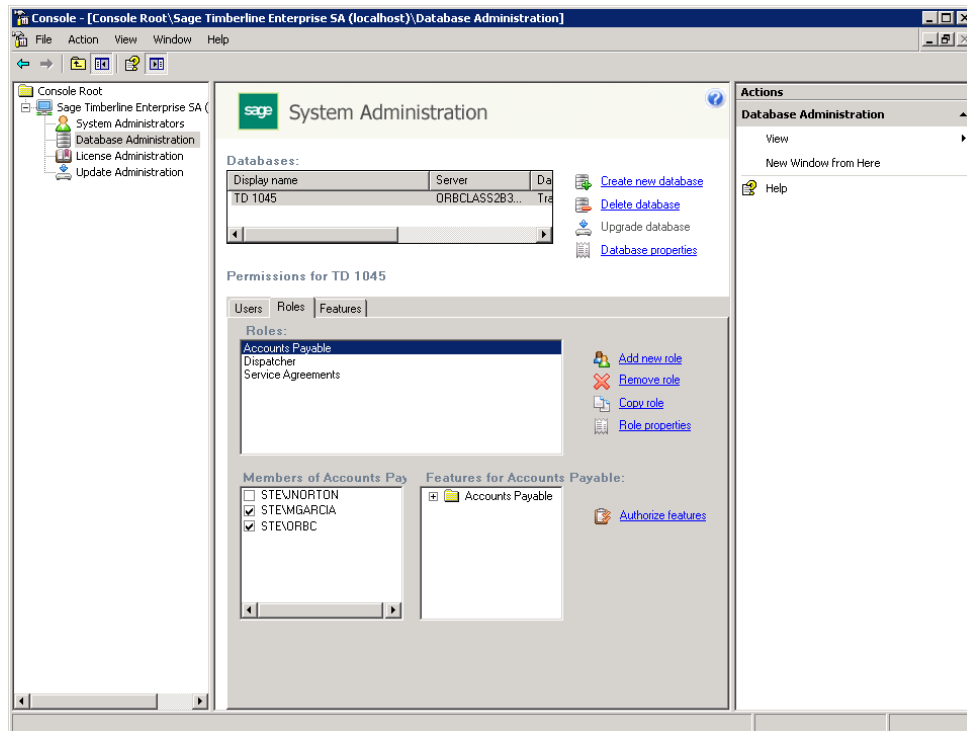


**NOTE:** For more information about adding or maintaining users, see the System Administration Help topics called “Users tab” and “Maintaining users.”

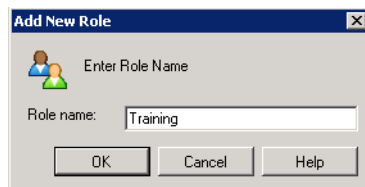
## Add a Role

Roles let you assign user permissions according to the tasks they perform.

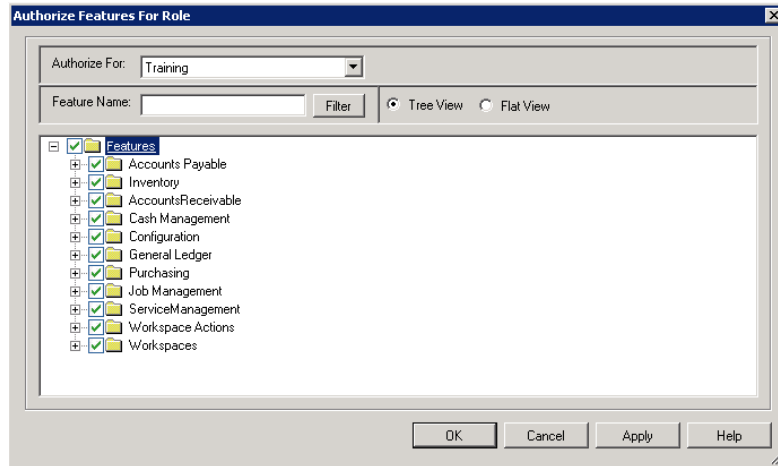
1. In **Database Administration**, click the **Roles** tab.



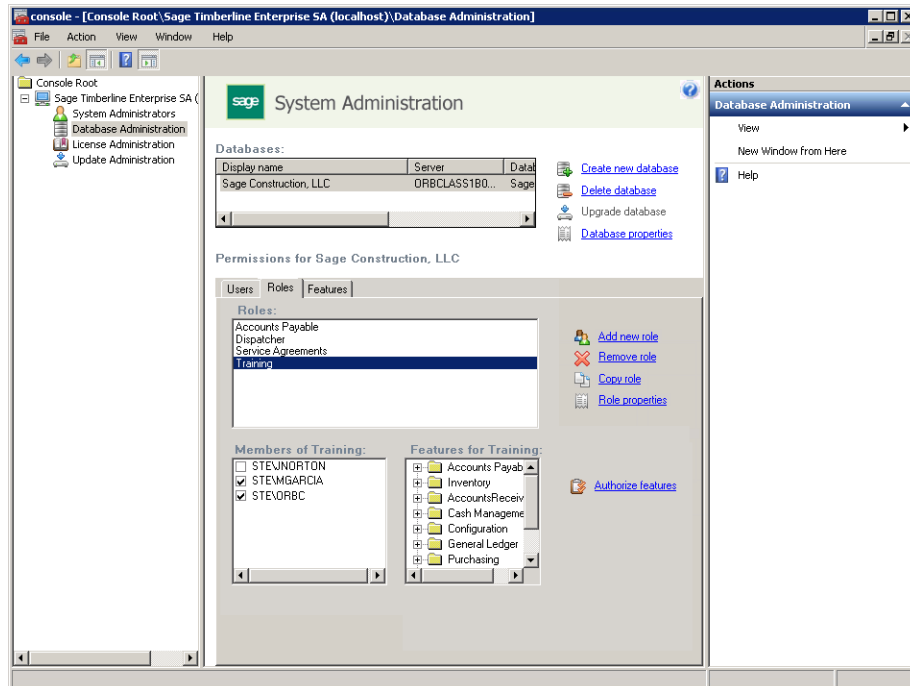
2. Click **Add new role**.



3. In the **Role name** box, type **Training** so that you can use this role for training purposes.
4. Click **OK**.
5. In the **Authorize Features For Role** window, select the **Features** check box, so that all features will be selected for the **Training** role.



6. Click **OK**.
7. In the **Members of** box, select the user that you added to this database.



**NOTE:** For more information about roles and features, see the System Administration Help topics called “Roles tab” and “Authorize Features for Role window.”





# Develop and Implement a Security Plan

If you have set up the sample database to work with Sage Timberline Enterprise, you already have at least one user, role, and system administrator set up in System Administration. To develop a complete security plan for your organization, you'll need to create lists of employees and the tasks they perform regularly, and then organize these lists into roles and features sets.

This section walks you through each of the security planning steps and considerations, with examples from the sample database, and then shows you how to implement your plan in System Administration.

## Understand Security in Sage Timberline Enterprise

Sage Timberline Enterprise security can be as simple or as robust as you need it to be. You define the level of access that each of your employees has to the modules and workflow tasks, as well as which databases they can access. If you have several employees who perform similar functions, you can assign each of them to the same role, facilitating your setup work.



**NOTE:** You can complete the procedures in this section at the server or at a workstation (if Sage Timberline Enterprise is already installed on the workstation). You must be logged on to Windows as a SQL Server administrator in order to complete the steps.

Security in Sage Timberline Enterprise is composed of the following elements, each of which are managed in System Administration.

- **System administrators.** The system administrator manages the databases, users, roles, and features for the entire Sage Timberline Enterprise system. This individual also has administrative permissions for the SQL Server instance on which Sage Timberline Enterprise is installed. Consider appointing more than one individual to this role so that you have adequate coverage.
- **Databases.** Databases hold your Sage Timberline Enterprise data. All users that you add in System Administration are associated with a particular database.
- **Users.** Sage Timberline Enterprise operators must be added to the database to which they will have access. You use Windows domain logon names to add users to the system.
- **Roles.** A role defines a set of permissions accessible to a user associated with that role. In order to access features in the software, users must be assigned to at least one role.
- **Features.** Tasks that you can perform in the software, such as entering invoices or entering transactions into General Ledger, are features that you can assign to roles.

## Understand Security in Payroll

The optional Payroll module has its own security setup.

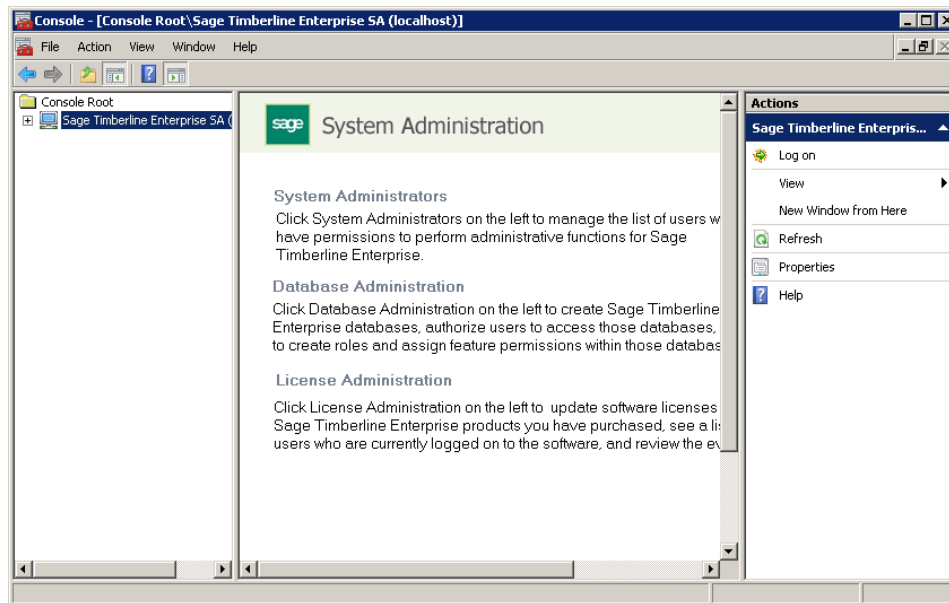
- To learn about Payroll security, open Payroll and select **Help > Documents**. Open SecurityGuide.pdf and read the document before planning your Payroll security model.
- To enable Payroll security, select **Tools > Security Setup** and then click **Security Settings**. Press F1 at any time for help with the active window.

## Establish Your System Administrators

The system administrator for Sage Timberline Enterprise manages the databases, users, and roles for the entire Sage Timberline Enterprise system, and also has administrative permissions for the SQL Server instance on which Sage Timberline Enterprise is installed. You probably added at least one system administrator when you installed the software. Considering assigning more than one individual to this role so that you have adequate coverage.

To set up the system administrator, follow these steps:

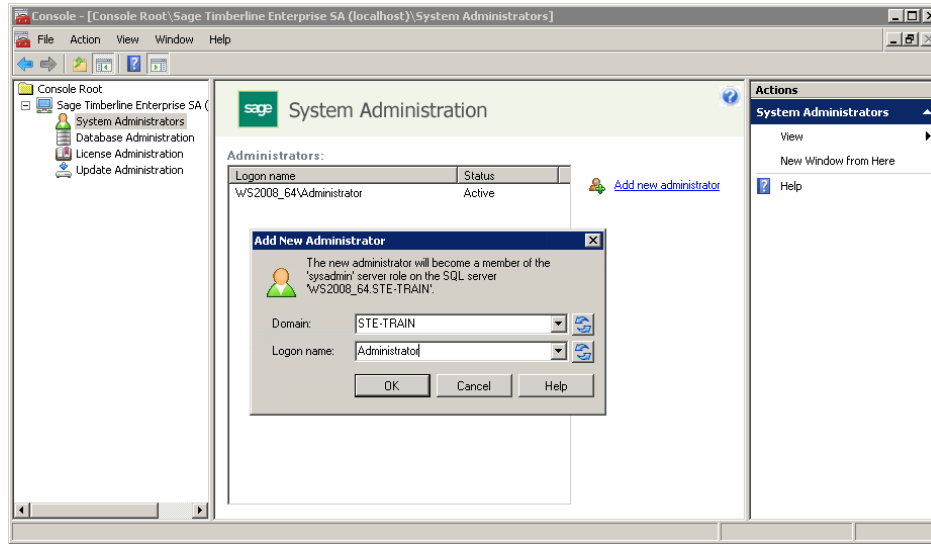
1. Start Sage System Administration if it is not already open (**Start > All Programs > Sage > Sage System Administration**).



2. Expand the tree on the left and click **System Administrators**.
3. Click **Add new administrator**.



4. Select the **Domain** and **Logon name** for the administrator. Click the **Refresh** button to refresh the list.



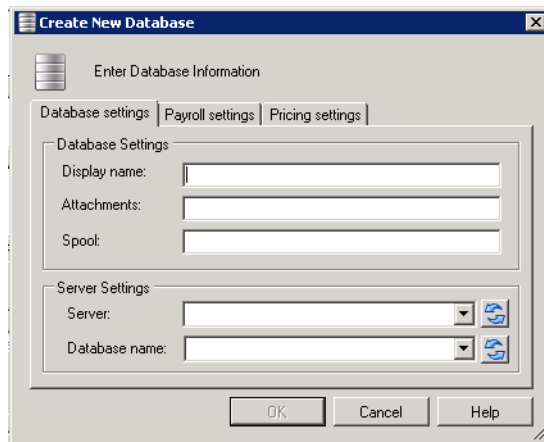
5. Leave the **System Administration** window open so you can return to it.

## Create a Database

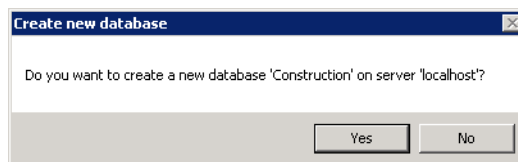
Except for system administrators, all users that you add in the System Administration module are associated with a particular database. Before you can add the users, you must create the database.

Note that the configuration settings for your database require careful consideration. We recommend that you work with a certified consultant and reference the setup documentation we provide to facilitate this process. However, if you are ready to start setting up security, you can create the database now and plan to refine the configuration settings later. Alternately, you can apply your security plan to the sample database for practice.

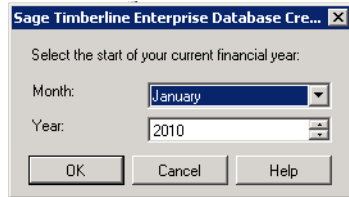
1. In **System Administration**, click **Database Administration**.
2. Click **Create New Database**.



3. On the **Database Settings** tab, enter a name for the database and the location of the **Attachments** and **Spool** folders. (For more information about these folders, see page 17.)
4. Next to **Server**, enter the name of the server.
5. Next to **Database name**, enter the name to use for your database files.
6. Click **OK**, and answer **Yes** to the confirmation message.



7. Select the starting month for your fiscal year, and then click **OK**. After a moment, the database appears in the list.



## Establish the List of Users

Sage Timberline Enterprise is integrated with Windows security, so you'll use Windows logon names to set up users in System Administration. Your users must already be set up in the domain's Active Directory before you can add them to System Administration.



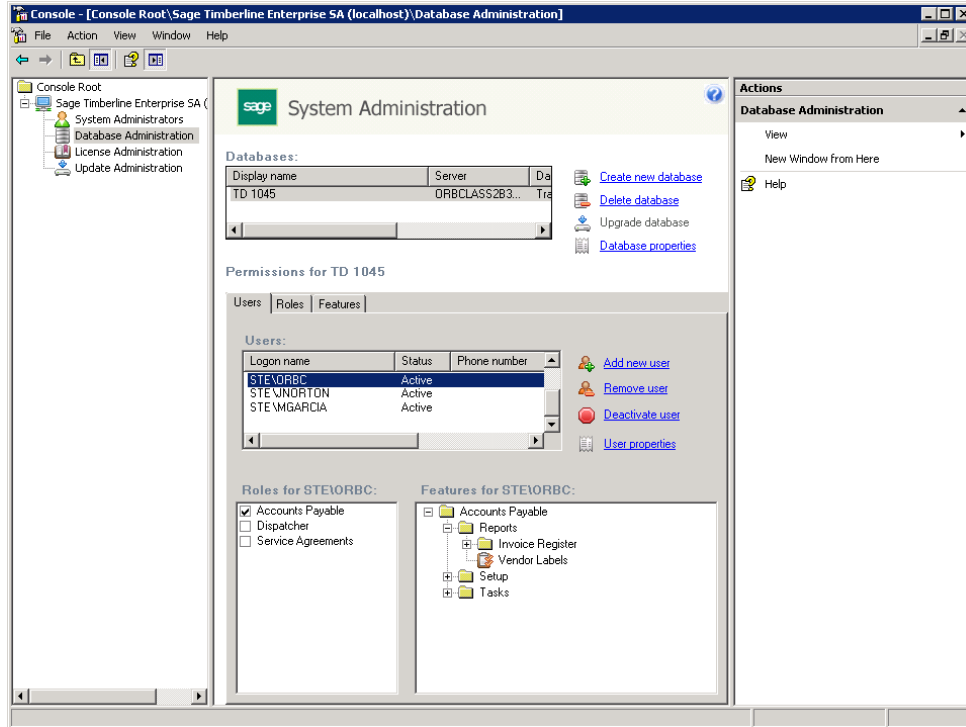
**NOTE:** Users with access to a database can access all records in that database through reporting and third party data access tools, including ODBC, SQL queries, Crystal Reports, and others.

To begin planning, create a list of users. Your list should include every employee in your organization who will have access to Sage Timberline Enterprise.

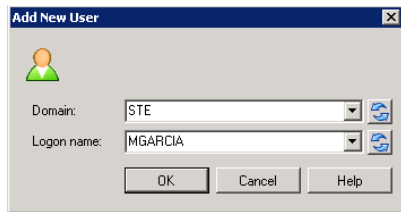
## Add Users to the Database

1. In System Administration, click **Database Administration**.

- Under **Databases**, select the database. (Whenever you add a user, you associate the user with the database you have selected.)



- On the **Users** tab, click **Add new user**.



- Your domain should already be selected. Type the user logon name or click the **Refresh** button to select from a list of domain users, and then click **OK**.

- Notice that the **Users** tab shows you the list of users that you have added so far. When you click a user, you see the roles to which that user is assigned, as well as the corresponding features.



**NOTE:** For more information about adding or maintaining users, see the System Administration Help topics called “Users tab” and “Maintaining users.”

## Establish a List of Roles

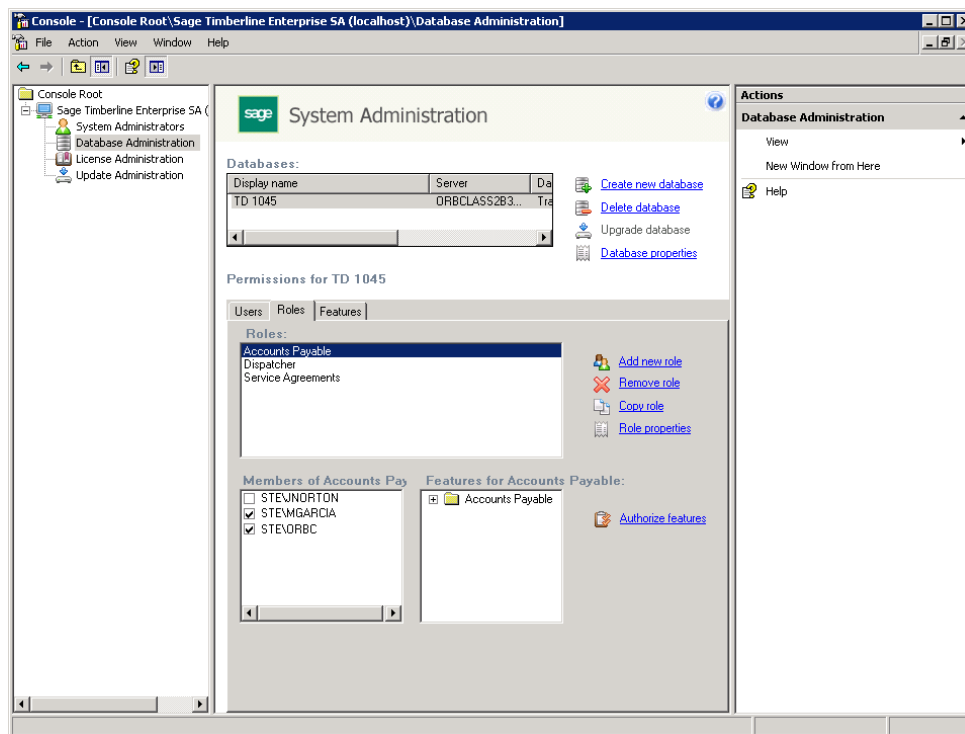
Roles are used to set permissions more efficiently, by grouping sets of features. For example, you might have an Accounts Payable role, a Dispatcher role, and a Service Agreements role, each with access to different tasks in the software.

Establish a list of roles to which each user will be assigned. You will probably find that you need to refine the features associated with each role, or even add new roles, as you learn about how your workflows are best accommodated.

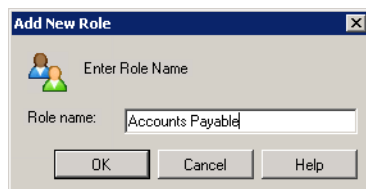
## Add Roles and Authorize Features

Roles let you assign user permissions according to the tasks they perform. You specify the features (tasks you can perform in the software) that are available to users associated with that role. For example, a user associated with a role called **Accounts Payable** might be able to set up vendors and enter invoices.

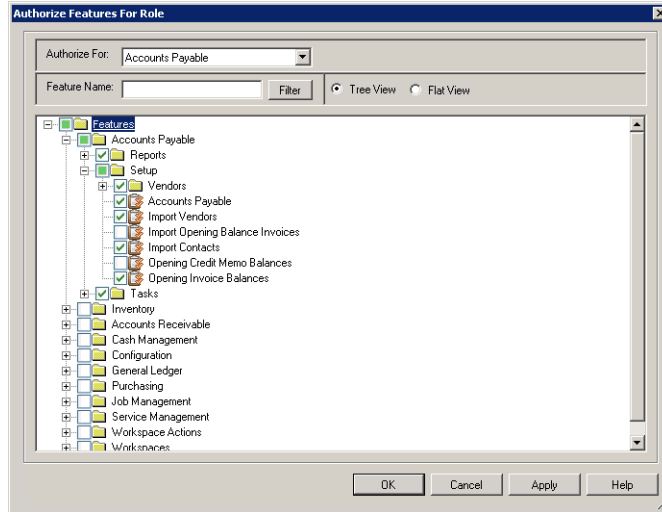
1. In **Database Administration**, click the **Roles** tab.



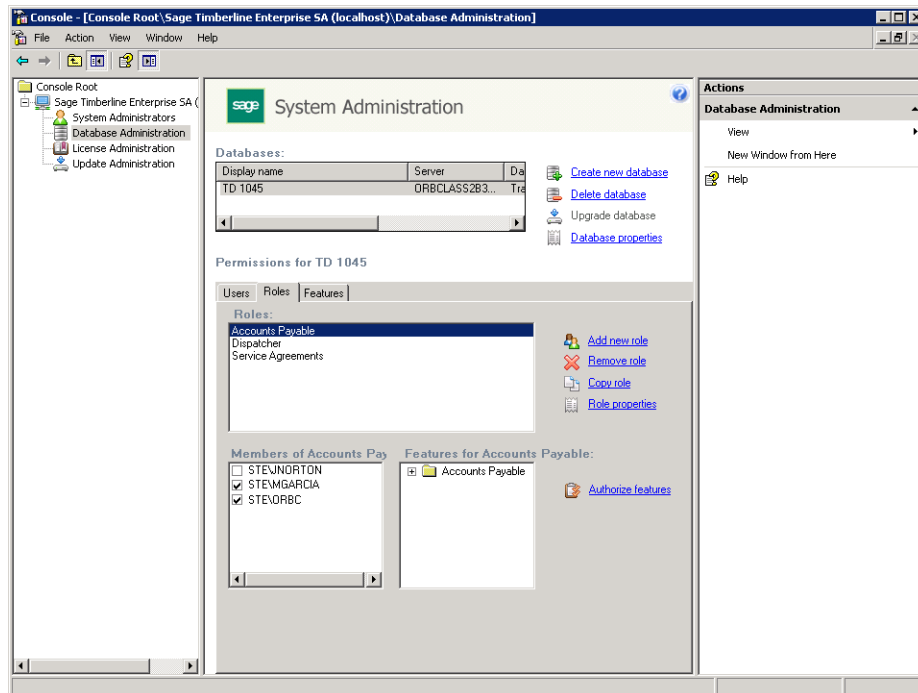
2. Click **Add new role**.



3. In the **Role name** box, type a name for the role.
4. Click **OK**.
5. In the **Authorize Features For Role** window, select the check boxes for the features that you want to assign to this role.

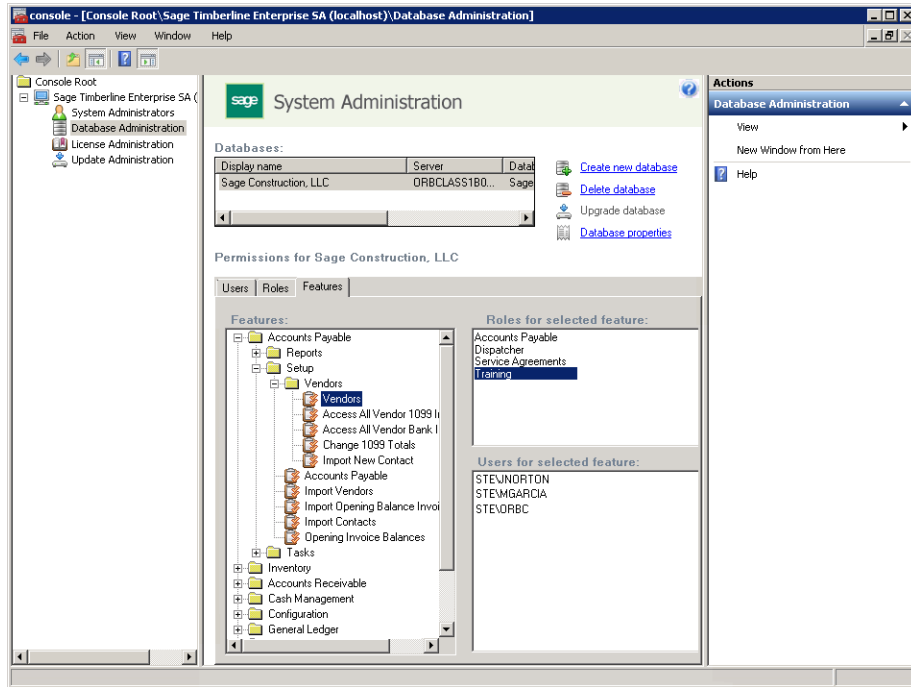


6. Click **OK**.
7. In the **Members of** box, select the users that you want to add to the role.





8. Click the **Features** tab, and notice that you can manage users and roles by feature from this tab.



**NOTE:** For more information about roles and features, see the System Administration Help topics called "Roles tab" and "Authorize Features for Role window."



# Workstation Installation

Once you have installed the server components and configured your software, you are ready to install Sage Timberline Enterprise on your workstations. This section shows you how to:

- Install Sage Timberline Enterprise on a workstation (page 92).
- Install Payroll on a workstation (page 96)
- Test your installations (page 101).

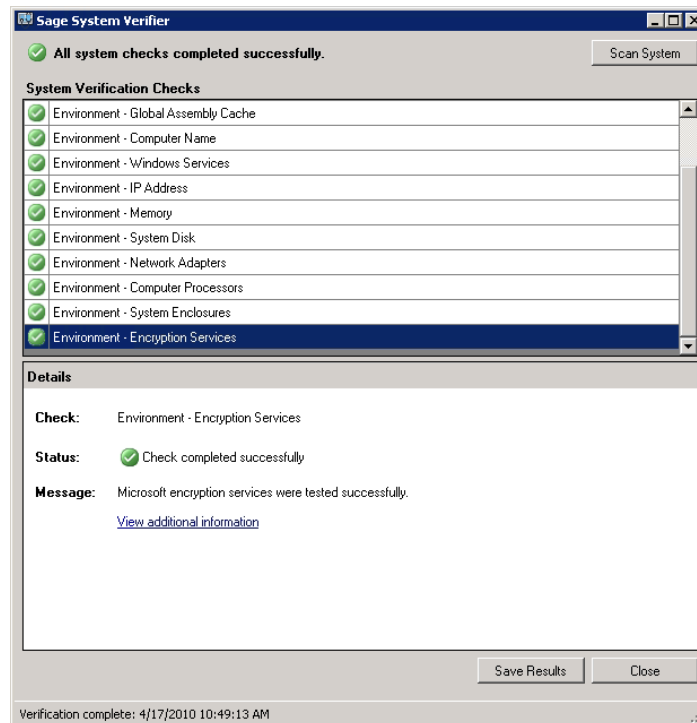
# Install Sage Timberline Enterprise on Workstations

Insert your Sage Timberline Enterprise installation DVD at the workstation.

1. In the **Setup and Installation** window, click **Perform system verification**.



2. In the **Sage System Verifier** window, click **Scan System**.

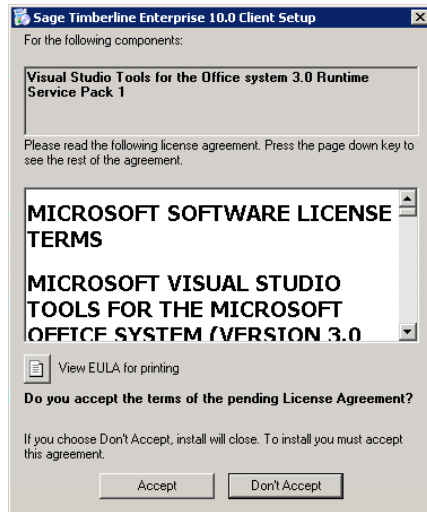


3. If any issues are found, you must address them before you can continue with the installation. The **Details** section of the window provides information about issue resolution. If no issues are found, click **Close**.

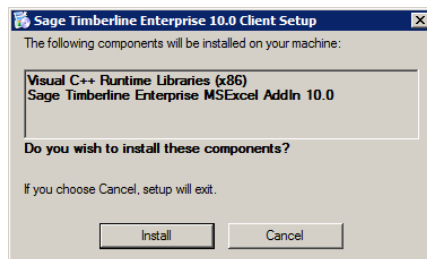
4. In the **Setup and Installation** window, under **Install**, click **Workstation components and tools**.



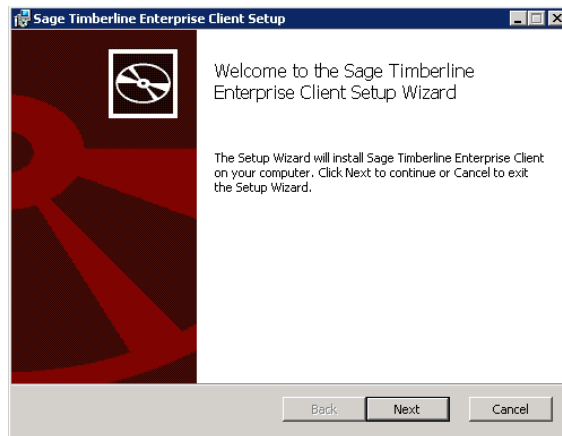
5. You may be asked to install missing prerequisites. Click **Accept** to continue.



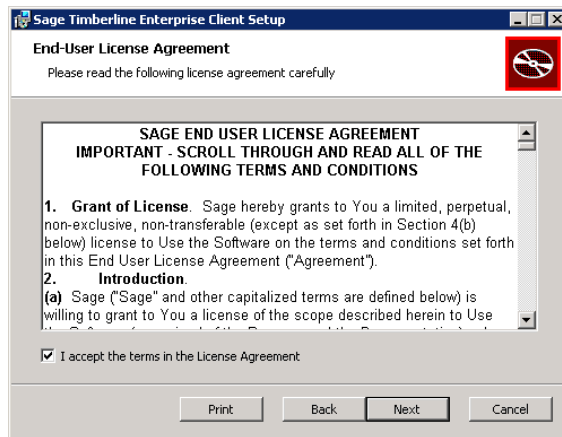
6. If you are asked whether you want to install the Sage Timberline Enterprise MSEXcel AddIn, click **Install**.



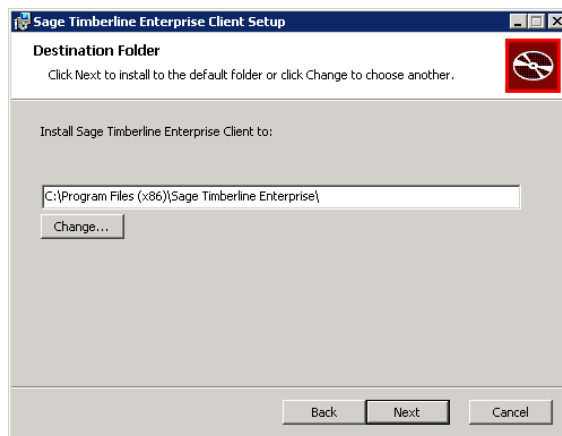
7. In the **Sage Timberline Enterprise Client Setup** window, select **Next**.



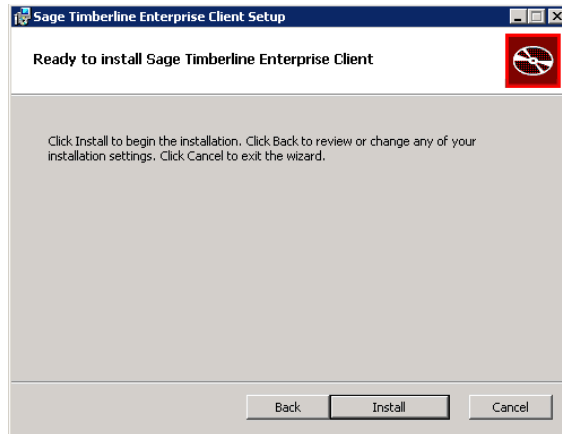
8. In the **End-User License Agreement** window, select **I accept the terms in the License Agreement**, and then click **Next**.



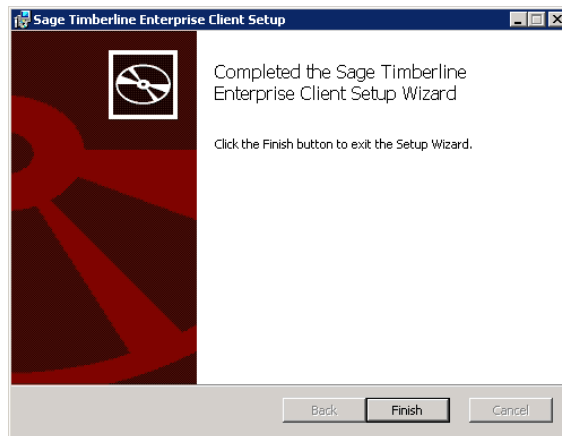
9. In the **Destination Folder** window, select the installation destination to which you want to install the software, and then click **Next**.



10. In the **Ready to Install Sage Timberline Client** window, click **Install**.



11. When the setup wizard completes the installation, click **Finish**.

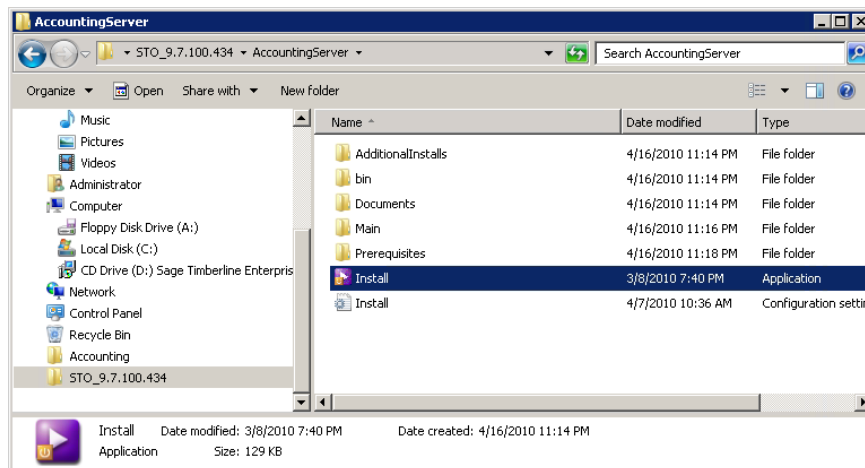


# Install Sage Timberline Enterprise Payroll on Workstations

Payroll is an optional module you can use with Sage Timberline Enterprise. You must install it on the server before you can install it on the workstation. If you have installed on the server, follow these instructions to install Payroll on the workstation.

Insert your Sage Timberline Enterprise installation DVD. You must do this at the server. Payroll cannot be installed from a network location.

1. At the workstation, browse to the shared **Timberline Office** folder drive on the server. (The Payroll server installation automatically shares this folder.)
2. In the shared folder, browse to **9.5\Accounting\WinInst.**
3. Double-click **Install.exe**.

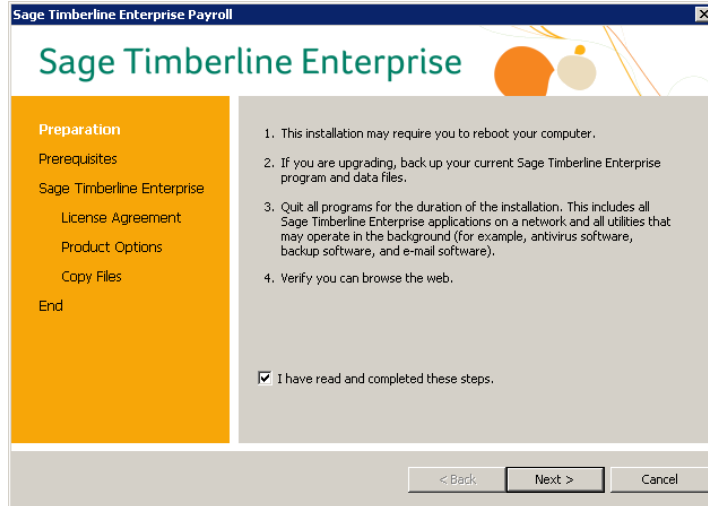


4. Click **Install Enterprise Payroll Client software.**

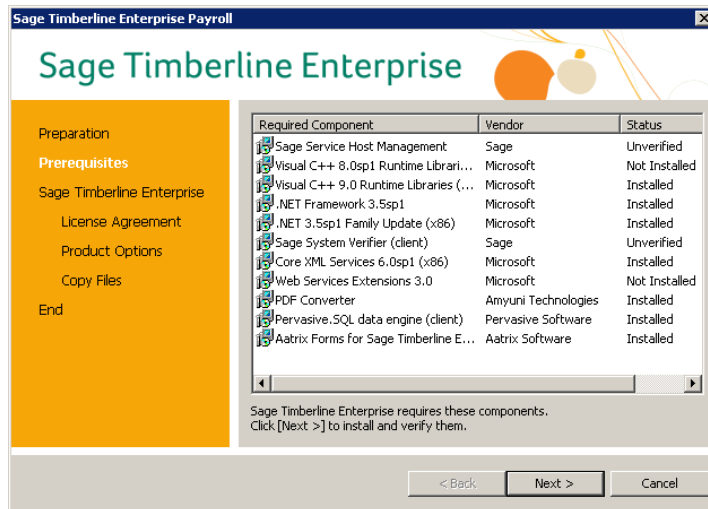




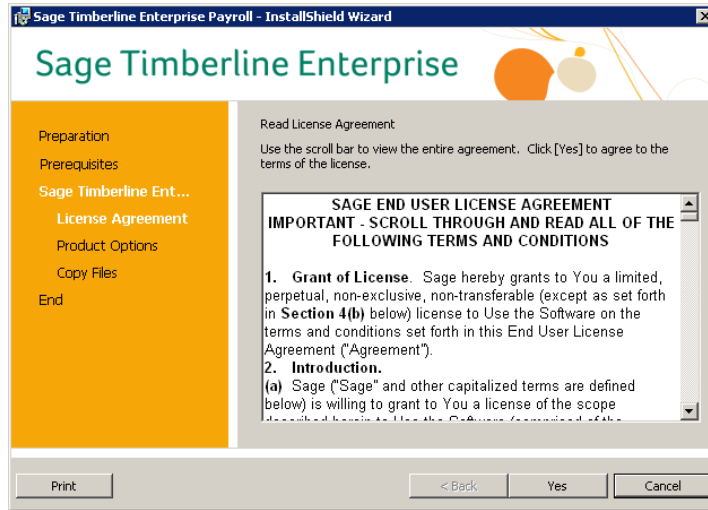
5. If you see a message that your system's Windows Installer service must be upgraded, click **Yes** and complete that installation before continuing. (The installation will require you to restart the computer.)
6. Read and perform the steps listed in the **Preparation** window. Select **I have read and completed these steps**, and then click **Next**.



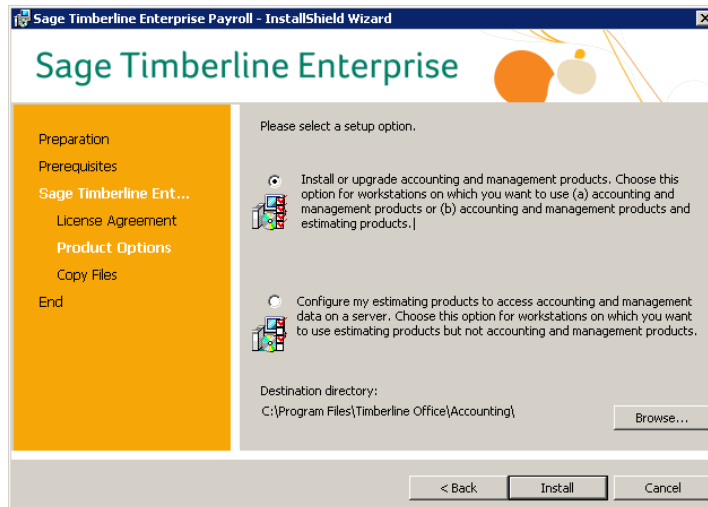
7. In the **Prerequisites** window, you can view the status of the additional software that is required to run Payroll. Click **Next** to continue.



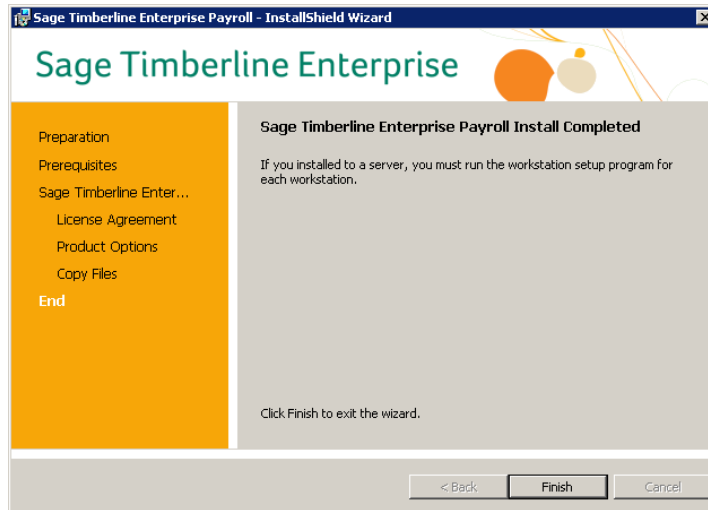
8. In the **License Agreement** window, click **Yes** to agree to the terms of the software.



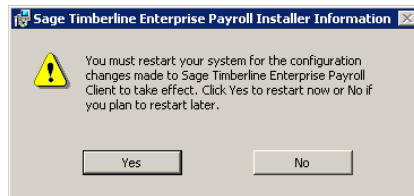
9. In the **Product Options** window, select the first option, and then click **Install**.



- When the installation is complete, in the **End** window, click **Finish**.



- A message indicates that you must restart your computer. Click **Yes** and allow the computer to restart before continuing.



## Install Estimating on Workstations

If you use Estimating, install it by following the procedure on page 55. The installation for the server and workstation are the same for Estimating.



# Test Your Sage Timberline Enterprise Installations

Follow these instructions at a workstation to make sure that your installation was successful.

1. Select **Start > All Programs > Sage > Sage Timberline Enterprise**.
2. In the the **Logon** screen, enter your Windows password.
3. Select the **Server** and **Database** to which you want to connect.
4. Click **OK**. Sage Timberline Enterprise should open successfully.



# System Maintenance

Once you have installed Sage Timberline Enterprise and begun using it for daily business, you will have an ongoing need to complete certain system administration and maintenance tasks. Some of these tasks, such as backing up your data, should happen at regularly scheduled times. Others will happen as needed, based on events such as upgrades, employee turnover, and hardware replacement.

The remainder of this guide provides information about system maintenance tasks.

Task	Information
<input type="checkbox"/> Back up your databases on a regular basis.	page 105
<input type="checkbox"/> Move the Sage Timberline Enterprise installation to a different server.	page 111
<input type="checkbox"/> Download and install software updates.	page 117





# Back Up Your Data

Backing up your data regularly is a critical component of disaster-recovery planning. You can lose data because of power outages, hardware failures, natural disasters, malicious acts, and many other causes too numerous to list. How much business information can you afford to lose? One day's worth? One week's worth? Your backup plan should take this into account and mitigate your risk of losing more than your specified tolerance.

Work with your certified consultant and information technology professionals to implement a backup schedule that protects you from catastrophic loss. Consider each of these factors:

- Types of backups
- Frequency of backups
- Storage location for backup media
- Testing and recovery

For information about which files to include in a backup of Sage Timberline Enterprise, see “Locations to Include in a Backup” on page 107.

## Types of Backups

Your backups can be a complete copy of all data or they can capture only the changes since the last backup. Your backup plan should strike a balance between the time needed to run each type of backup and the security of your data.

- A **full backup** is a complete backup of all data. This backup type is the most time-intensive.
- A **differential backup** is a cumulative backup of all changes made since the last full backup. This type of backup is usually faster than a full backup. However, if so much time has elapsed since the last full backup that most files need to be included, the time savings is minimal. To restore from a differential backup, you must first restore the last full backup, and then restore the differential backup.
- An **incremental backup** is a backup of only the files that have changed since the last full or differential backup. This is the fastest type of backup because it copies only a fraction of all files. However, to restore from an incremental backup you must first restore the last full backup, and then restore the last differential backup, and finally restore each incremental backup since the last differential backup. Each of these must be completed in the correct order (restoring oldest backups first and newest last).

## Frequency of Backups

A combination of daily, weekly, and monthly backup cycles can help you balance the need for frequent backups of ongoing daily transactions with the need for reliable archives of large amounts of data.

At the minimum, you should have an incremental backup daily. You might perform full backups weekly, and incremental or differential backups daily for a complete picture that is never more than one week old.

In addition to regularly scheduled backups, perform backups immediately following significant events such as month-end or year-end processing, software upgrades, or server migrations.

## Storage Locations for Backup Media

Store backups on different physical media than their original location. If you lose data because of disk failure, a backup stored on the same disk will not be any more accessible than the original data.

Periodically, media containing a full backup should be transferred to a separate, secure physical location such as a safety deposit box or a secure data storage and management company. Media stored on-site can be restored in the case of hardware failure—but in the case of a natural disaster, you might have to retrieve off-site media. Many companies store periodic full backups in a different geographic region to protect from regional disasters.

## Testing and Recovery

Every viable backup plan must include restoring backups to a test environment on a regular basis. Until you have tested a particular backup set, you don't know for certain that the files were not corrupted, lost, skipped, or otherwise rendered unusable. If any of these conditions exist, you might as well not have a backup at all. An inaccessible or unusable backup does not protect your business the way it's supposed to.

As part of your regular backup schedule, restore backups to a testing environment and run data checks such as inquiries or reports. If your restored data does not meet your standards, you need to find the cause of the problem, fix it, and run another backup before your disaster-recovery plan can be considered effective.

## Locations to Include in a Backup

In addition to your database files, several other folder locations contain files that you will need in the event that you must restore a system from backup. Note the following:

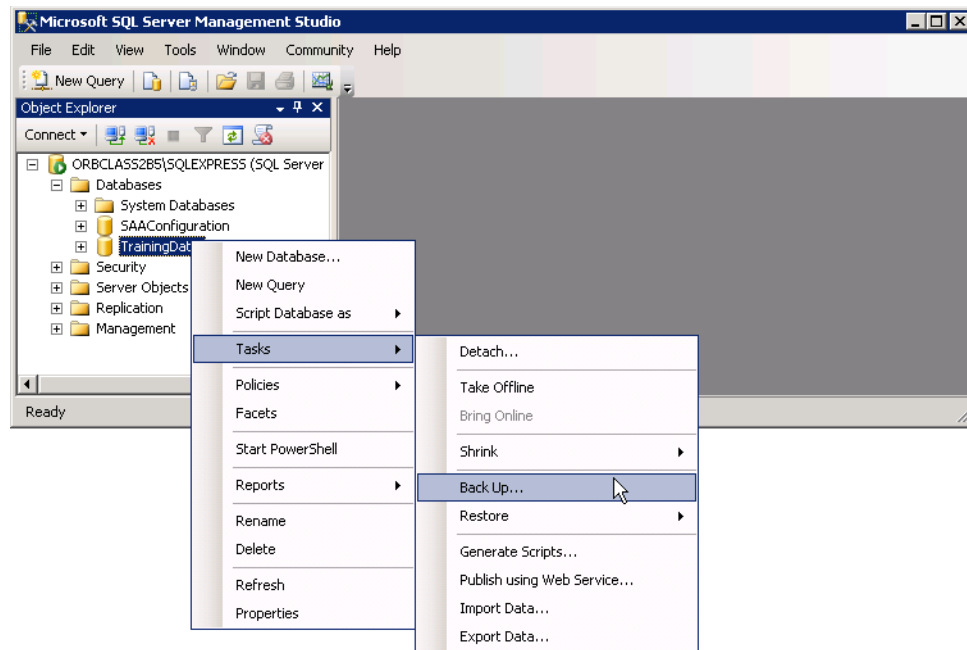
- Most of your Sage Timberline Enterprise data is stored in SQL Server database files. These are the .mdf and .ldf files in the default SQL data location. You can use SQL Server's backup tools to back up this portion of the data.
- The SAAConfiguration database should be backed up with your other Sage Timberline Enterprise data. This is a SQL Server database that the system uses to store changes to system administrators or company database configurations. Use SQL Server's backup tools to back up this database along with the others.
- Each Sage Timberline Enterprise database has associated Attachment and Spool folders. These folders are not included in backups created by SQL Server's backup tools. Plan to archive them separately at the same time you back up your SQL database files.
- If you have the optional Payroll module, the payroll data is stored in a Pervasive database. Back up your Pervasive and SQL Server databases at the same time to keep them synchronized.

## Back up SQL Server Databases

The steps below outline a procedure for backing up your SQL Server databases. Modify these steps as needed based on your company's internal requirements and system configuration.

1. When the scheduled backup time arrives, ensure that all users are disconnected from Sage Timberline Enterprise.
  - a. In Sage System Administration, go to **License Administration** and click the **Active Users** tab to see the list of active users. Ask each of the users listed on this tab to log out of the software.
  - b. Click **Restrict Logon**. (This prevents new connections to any Sage Timberline Enterprise database, but it does not close existing connections.)
2. Start SQL Server Management Studio (**Start > Programs > Microsoft SQL Server > SQL Server Management Studio**) and connect to the server that hosts the database you want to back up.
3. Expand **Databases** under the SQL Server instance.

4. Right-click the database and select **Tasks > Back Up**.



5. Select the options for the backup. For information on the options, click **Help**.
6. Click **OK** to begin the back up process.
7. After the backup is complete, repeat this process for all databases that you need to back up, including the SAAConfiguration database.
8. In System Administration, click **Allow logon** when you are finished to allow users back in to the software.

## Back up Pervasive Databases

Backup up Pervasive databases using File Tools, a utility included with Payroll.

1. In Payroll, select **Tools > File Tools**.
2. Select **Backup**, and then click **Next**.
3. Click **Add Folder** and select your company data folder.
4. Click **OK**, and then click **Next**.
5. Next to **Destination**, click **Browse** to select the location to save the backup file. In the **Archive Name** box, enter a name for the file.
6. Click **Next** to start the process, and continue clicking **Next** to complete the wizard.
7. When the process is complete, click **Finish**.

## Back up Other Important Folders

Along with the database files, back up these other folders using your preferred backup application. (These folders are not included in SQL Server or Pervasive backups).

- **Attachment** and **Spool** folders. To locate these folders for each database, in System Administration, select the database and click **Database Properties**.
- The folder **Documents and Settings\All Users\Application Data\Sage**. This folder contains additional Sage Timberline Enterprise information.



# Move Sage Timberline Enterprise to a New Server

You might decide to move your Sage Timberline Enterprise installation to a different server in order to take advantage of newer hardware or system resources. With planning, you can complete this transition smoothly. Review the tasks in this checklist before you begin a server migration.

Task	Information
<input type="checkbox"/> Prepare the new server for the migration	page 111
<input type="checkbox"/> Back up your data	page 105
<input type="checkbox"/> Schedule the migration	page 112
<input type="checkbox"/> Disconnect all users	page 112
<input type="checkbox"/> Move your databases to the new location	page 112
<input type="checkbox"/> Deactivate your Sage Timberline Enterprise licenses on the old server	page 114
<input type="checkbox"/> Install remaining software on the new server	page 115
<input type="checkbox"/> Configure users on the new database if necessary	page 115
<input type="checkbox"/> Verify that your users and workstations can connect to the new server	page 115

## Prepare the New Server for the Migration

Complete the following preparation tasks on the new server, referring to the pages listed for more information.

- Review the system specifications for Sage Timberline Enterprise and verify that your new server meets the minimum requirements (page 7).
- Verify that your new server is part of a Windows domain, and add it if necessary (page 15). If you are moving Sage Timberline Enterprise to a different Windows domain, add all users to Active Directory for the new domain.
- Configure the new server's firewall as needed (page 15).
- If you are also moving the Microsoft SQL Server 2008 installation:
  - Determine the new location for your database, spools, and attachments folders (page 17).
  - Install SQL Server on the new server and configure it to work with Sage Timberline Enterprise (page 22).

## Schedule the Migration

The migration process requires that all users be disconnected from the Sage Timberline Enterprise database you are moving. Schedule a time when this will be least disruptive to your business, such as an evening or weekend. The time required will vary according to the size of your databases and the speed of your network.

If your SQL Server instance also contains other databases, you can select a migration method that allows the other databases to remain in use during the migration. This is true whether the other databases are associated with Sage Timberline Enterprise or another application. The available methods are outlined below.

If you have more than one database associated with Sage Timberline Enterprise, consider whether you will migrate all databases during the same scheduled time frame (requiring all users to close Sage Timberline Enterprise), or you will migrate databases at different scheduled times to allow some databases to remain active.

## Disconnect all Users

When the scheduled migration time arrives, ensure that all users are disconnected from Sage Timberline Enterprise.

1. In Sage System Administration, go to **License Administration** and click the **Active Users** tab to see the list of active users. Ask each of the users listed on this tab to log out of the software.
2. Click **Restrict Logon**. (This prevents new connections to any Sage Timberline Enterprise database, but it does not close existing connections.)

## Move Your Databases to the New Server

If you plan to move your installation of Microsoft SQL Server to a new server (as well as the Sage Timberline Enterprise installation), you must move your databases to the new database server. Otherwise, you can skip to “Deactivate Licenses on the Current Server” on page 114.

Verify that you have a reliable backup of your database, and that all users are logged out of the database. Then, use one of the following methods to move the databases. (Instructions for each of these start on the next page.)

- Back up and restore the databases. Backup files are smaller than the original files, so this method may result in less time needed to copy the database to the new location. This option also allows all SQL Server databases (including the one you are copying) to remain in use during the process. If you have other



databases on the server, this is a benefit, but any changes made to the database after you create the backup will be lost.

- Detach and move the databases. This method allows all SQL Server databases on the server to remain in use, except for the database you are moving. The files are not compressed in this option, so moving the data may require more time.
- Stop the SQL Server services and copy the databases. This method prevents users from accessing any database on the SQL Server instance that hosts Sage Timberline Enterprise. If you have other databases that use the same SQL Server instance and you need them to remain available, select one of the other options.

### To Back Up and Restore the Database

1. At your current server, log on to SQL Server Management Studio (**Start > Programs > Microsoft SQL Server 2008 > SQL Server Management Studio**).
2. Expand **Databases**. Right-click the database and select **Tasks > Back Up**. Specify the **Backup type** as **Full**, and enter the location to store the backup. This process creates a .bak file in the location you specified.
3. At the new server, log on to SQL Server Management Studio (**Start > Programs > Microsoft SQL Server 2008 > SQL Server Management Studio**).
4. Right-click **Databases** and select **Restore Database**. Select the .bak file from step 2.

### To Detach and Move the Database

1. At your current server, log on to SQL Server Management Studio (**Start > Programs > Microsoft SQL Server 2008 > SQL Server Management Studio**).
2. Expand **Databases**. Right-click the database and select **Tasks > Detach**.
3. In the **Detach Database** window, select **Drop Connections** and click **OK**. (Selecting **Drop Connections** causes Sage Timberline Enterprise to close automatically on all workstations. All users should be logged out of the software before you do this.)
4. In Windows Explorer, browse to the database (.mdf and .ldf) files. Copy them to the new default data location. (See “Determine the Location of Data and Shared Folders” on page 17 for help determining this location.)
5. At the new server, log on to SQL Server Management Studio (**Start > Programs > Microsoft SQL Server 2008 > SQL Server Management Studio**).
6. Right-click **Databases** and select **Attach**. Click **Add**, and add the database.

## To Stop SQL Server Services and Copy the Database

1. At your current server, open SQL Server Configuration Manager (**Start > Programs > Microsoft SQL Server 2008 > Configuration Tools > SQL Server Configuration Manager**.)
2. Click **SQL Server Services**.
3. Right-click each of the services listed and select **Stop**. (This closes all connections to Sage Timberline Enterprise automatically. All users should be logged out.)
4. In Windows Explorer, browse to the database (.mdf and .ldf) files. Copy them to the new default data location. (See “Determine the Location of Data and Shared Folders” on page 17 for help determining this location.)
5. At the new server, log on to SQL Server Management Studio (**Start > Programs > Microsoft SQL Server 2008 > SQL Server Management Studio**).
6. Right-click Databases and select **Attach**. Click **Add**, and add the database.

## Deactivate Licenses on the Current Server

Before you can move Sage Timberline Enterprise to a new server, you must first deactivate the licenses on the existing server. If you are unable to access the original server due to a hardware failure, you must contact Sage customer support to have your server licenses deactivated.

1. Log on to the existing Sage Timberline Enterprise server using the Sage system administrator account.
2. Start Sage System Administration (**Start > All Programs > Sage > Sage System Administration**).
3. Select **License Administration**.
4. Click **Restrict logon** to prevent new users from logging on. This does not remove active users. If any users are currently active, ask them to close Sage Timberline Enterprise. When all users have logged off, continue with this procedure.
5. On the **License information** tab, click **Deauthorize license server**. You will receive a message that the server is no longer authorized.
6. Click **OK**.

## Install Remaining Software on the New Server

Complete the remaining installation tasks on the new server, referring to the pages listed for more information.

- Install and configure Microsoft Internet Information Services on the server that will hold Sage Timberline Enterprise (page 43).
- Install Sage Timberline Enterprise on the new server (page 47).
- Install Payroll (optional, page 50).
- Install Estimating and License Manager (optional, page 55).
- Run the Sage System Administration Configuration Wizard (page 64).
- Activate Your Sage Timberline Enterprise Licenses (page 71).

## Configure Users in Sage System Administration

Complete this step if your new Sage Timberline Enterprise installation is on a different Windows domain than previously. Otherwise, proceed to “Test the New Installation.”

Before you can complete this step, all users must be added to Active Directory for the new domain.

1. At the new server, open Sage System Administration.
2. Click **Database Administration**. Note that the list of users is retained after you moved the database. However, if you moved your installation to the new domain, the domain listed for each user is incorrect.
3. Click the first user to select it. Click **Add user**, and add the corresponding user from the new domain. Reassign this user to the necessary roles.
4. Click the original user, and click **Remove user**. Only the new user should remain.
5. Complete this procedure for each user associated with the database.

## Test the New Installation

To verify that the server migration was successful, follow this procedure.

1. At each workstation, select **Start > All Programs > Sage > Sage Timberline Enterprise**.
2. In the the **Logon** screen, enter your Windows password.
3. Verify that the new server and database are listed.
4. Click **OK**. Sage Timberline Enterprise should open successfully.



# Check for Software Updates

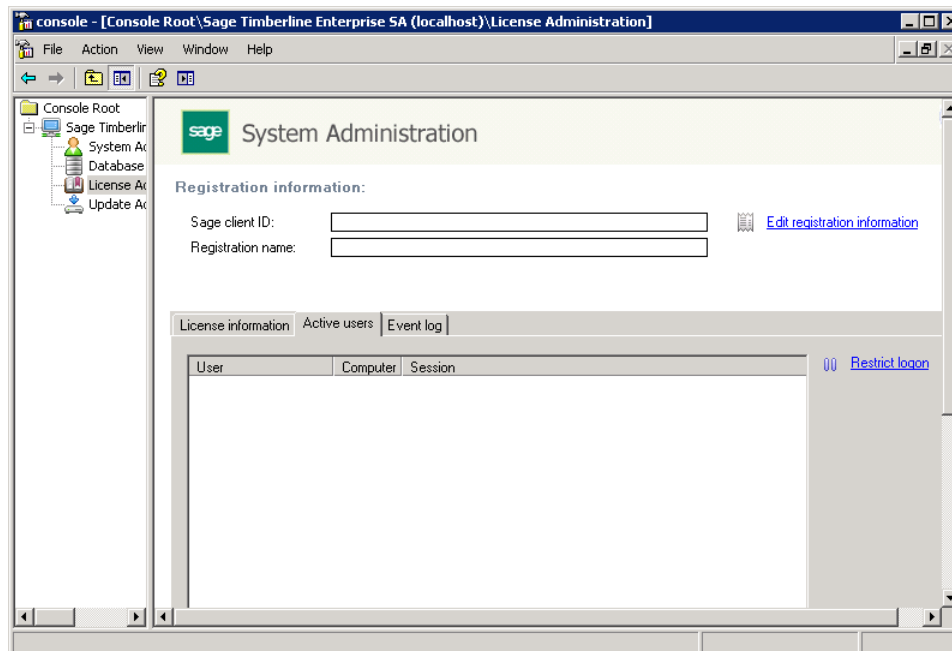
Periodically, Sage releases software updates that include items such as new features or updated Payroll tax files. You can download these updates automatically or manually from System Administration, and can choose when you want to install them to your server. Once you install an update on the server, you can install it on the workstations.



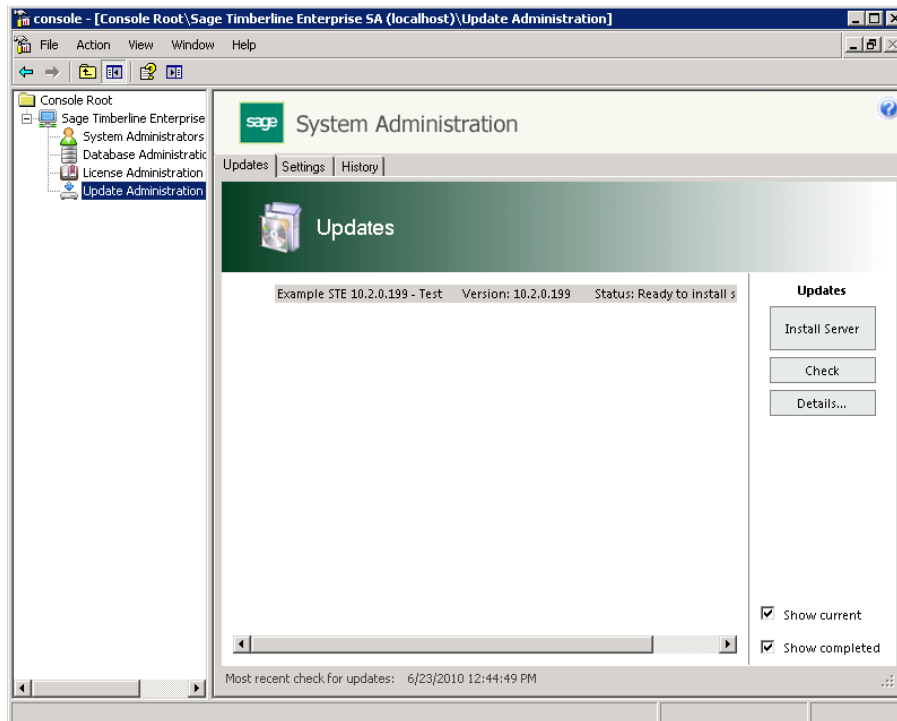
**NOTE:** You must complete this procedure at the server, and you must be logged on to Windows as a Sage Timberline Enterprise administrator. Although System Administration is installed on workstations, the **Update Administration** options are available only on the server.

## Download and Install an Update

1. Back up your databases and other important files before you install an update. (See “Back Up Your Data.”)
2. Open System Administration (**Start > All Programs > Sage > Sage System Administration**).
3. Make sure that no workstations are connected to Sage Timberline Enterprise. You can see active users in System Administration by clicking **License Administration** and then clicking the **Active Users** tab.
4. Click **Restrict Logon** to prevent any further connections.



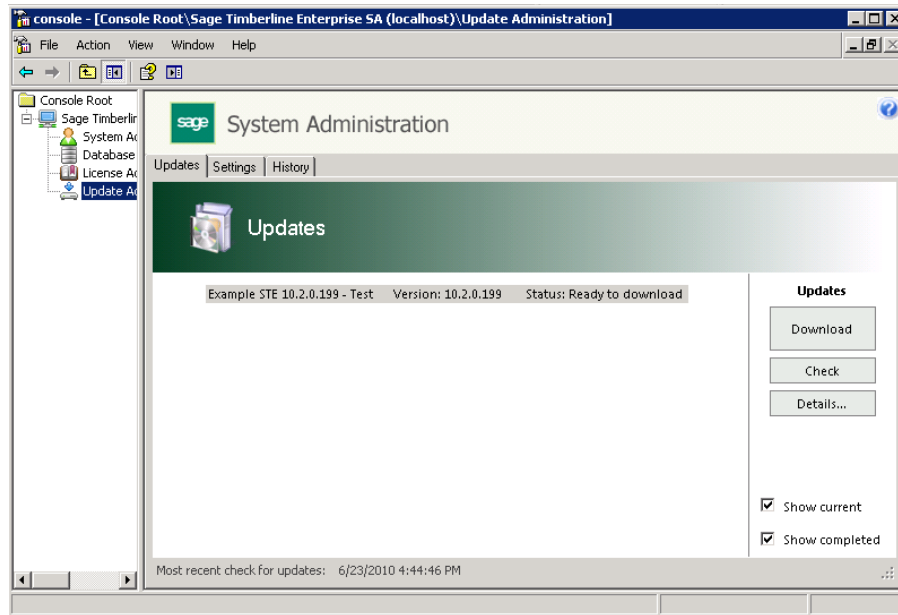
5. Click **Update Administration**. The appearance of the next window differs according to whether automatic downloads are enabled. (By default, automatic updates are enabled. Instructions to change this setting are on page 123, step 14.)
  - If automatic updates are enabled and updates are present, they are listed in this window. The top right button says **Install Server** and the status of the update is **Ready to install server update**.



- If automatic updates are enabled but no updates are listed in the window, you can click **Check** to check for updates and download any that are found.

- If automatic updates are disabled, click **Check** to check for updates. Updates will be listed, but not downloaded.

The top right button says **Download**, and the status of the update is **Ready to download**. Click **Download** to obtain the update.



- Once an update is downloaded, click the **Details** button to see the details of an update.

Update Details	
Name:	Example STE 10.2.0.199 - Test
Product:	ste-10.2
Version:	10.2.0.199
Alert Title:	Example STE 10.2.0.199
Type:	Update
Urgency:	Critical
Description:	Example Sages stuff is available.
Workstation install requires administrator credentials:	No
Update Id:	bf28a978-dba8-4d3d-bb97-5a511ef012a1
Download Url:	
Server Installer:	10.2.0.199_Server.msp
Client Installer:	10.2.0.199_Client.msp
Status:	Ready to install server update (ReadyForServerIn
	<a href="#">Update Folder...</a>
<input type="button" value="OK"/>	

From this window, you can click **Update Folder** to browse to the location of your updates.

- Click **OK** to close the **Details** window.
- Once updates are downloaded, select an update to install, and then click **Install Server**.



**NOTE:** All computers (servers and workstations) must have the same version of Sage Timberline Enterprise. When each workstation next connects to the server, a message is displayed indicating that the workstation needs to be updated. You can update the workstation at that time. You will not be able to use Sage Timberline Enterprise at a given workstation until the update is installed.

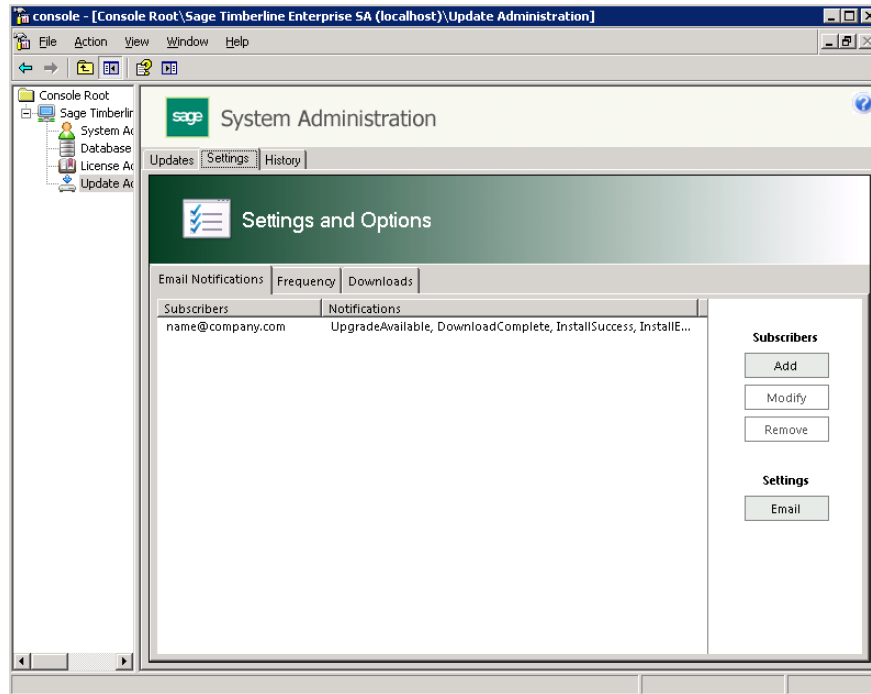
## Configure Automatic Software Updates and Notification

You can configure System Administration to notify you automatically whenever an update to Sage Timberline Enterprise is available.

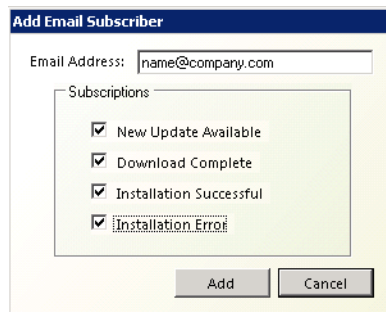
- Open the System Administration (**Start > All Programs > Sage > Sage System Administration**).
- Click **Update Administration**.



3. Click the **Settings** tab, and then click the **Email Notifications** subtab.



4. Click **Add**.



5. Add the e-mail address and select the type of emails you want to receive.
6. Click **Add**. The new e-mail address appears under **Subscribers**.
7. To test an e-mail address, under **Settings**, click **Email**.
8. Supply a valid email address, user name, and password.

- Enter the information about your email server.

**Email Account**

**Settings**  
Enter the email account information used to connect to your email server.

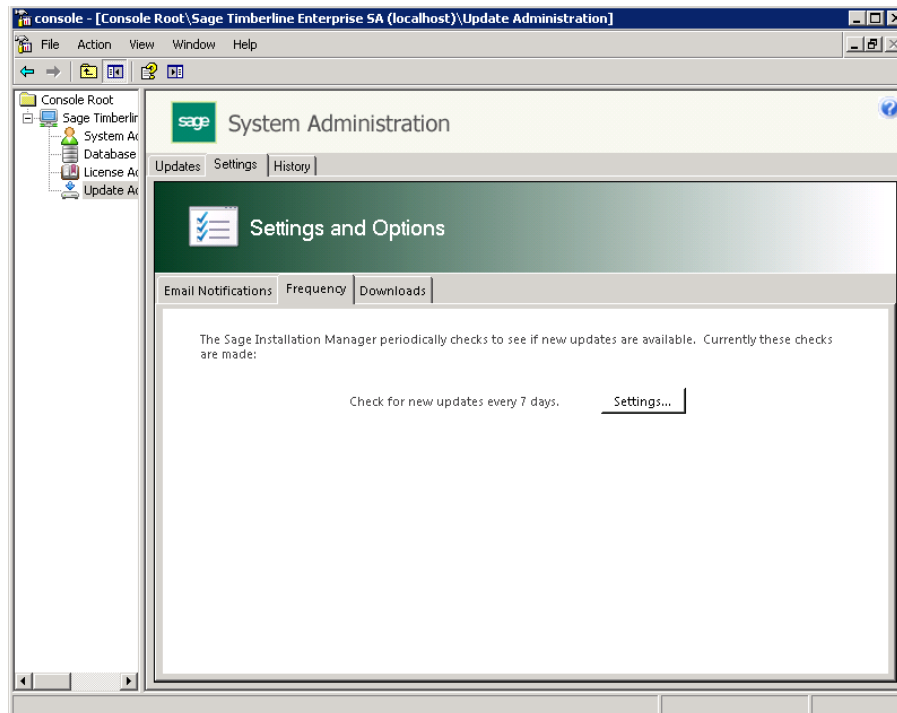
**Account Information**  
Email address:   
User name:   
Password:

**Server Information**  
Outgoing mail server (SMTP):  Port:   
 Use Secure Sockets Layer (SSL)

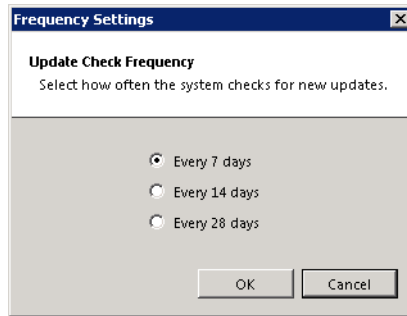
**Test Email Settings**  
After filling out the information on this screen, we recommend that you send a test email to verify the system is working correctly (requires a network connection).

Send Test Email... OK Cancel

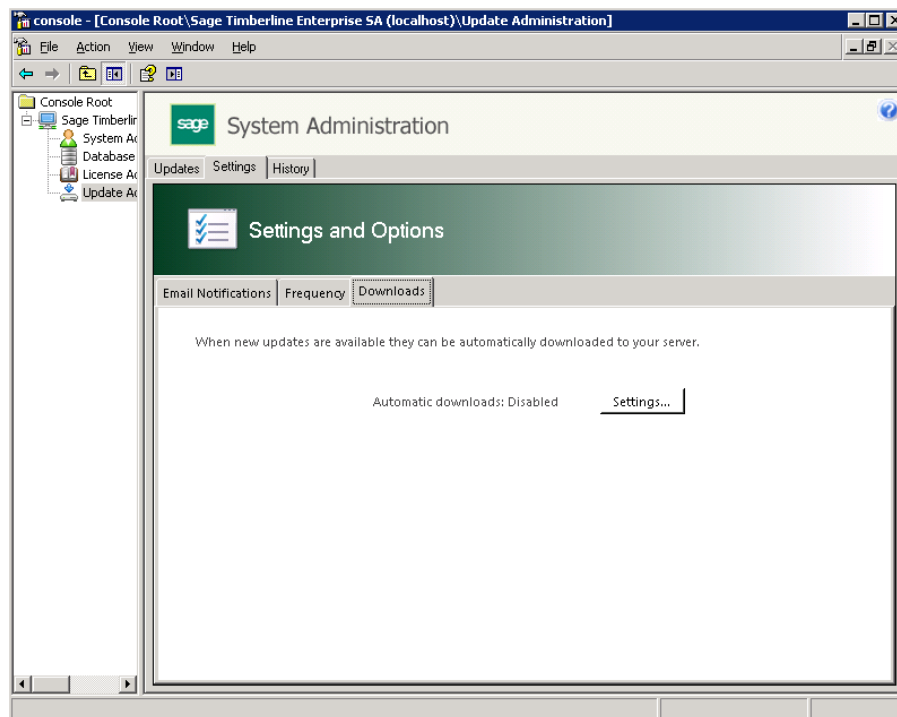
- Click **Send Test Email**. A test email is sent to the account listed next to **Email address**.
- Click the **Frequency** subtab. This tab lets you indicate how often the Installation Manager should check for new updates.



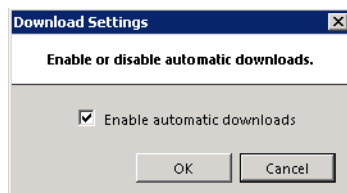
- Click **Settings** to specify the frequency. The default setting is **Every 7 days**.



- Click **OK**, and then click the **Downloads** subtab. This tab lets you enable or disable automatic downloads.

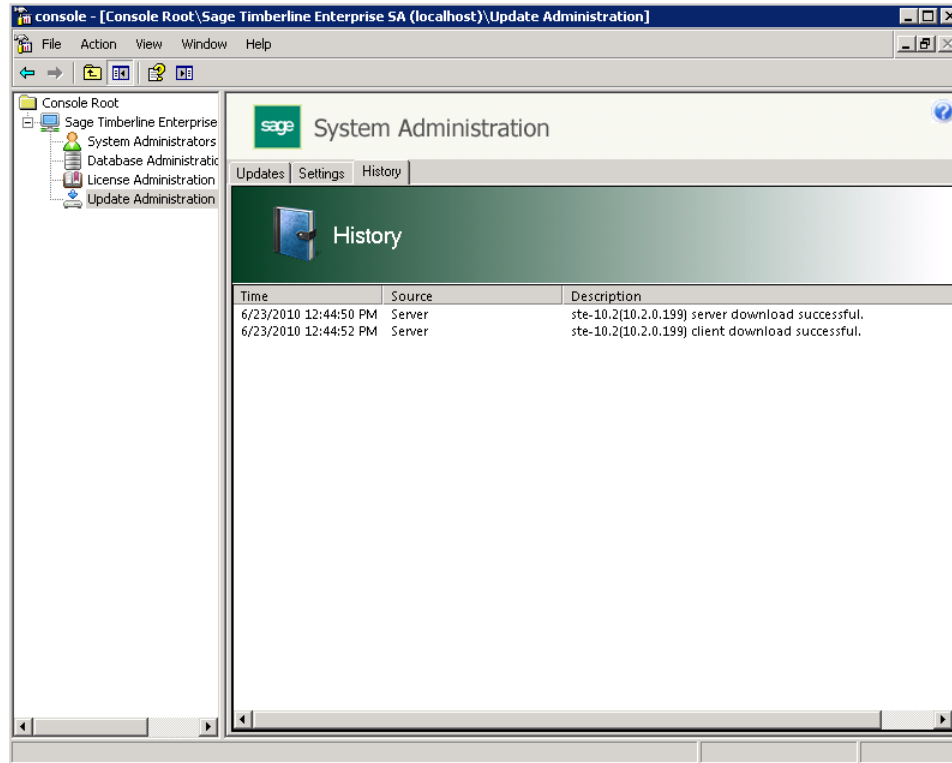


- Click **Settings** to change the download setting. The default setting is to automatically download updates.



## View Update History

1. Open the System Administration (**Start > All Programs > Sage > Sage System Administration**).
2. Click **Update Administration**, and then click the **History** tab. The page shows information about updates that have been downloaded or installed.



## Further Assistance

If you need further assistance with Sage Timberline Enterprise, these additional resources are available to you.

### Additional documentation

The **Sage Timberline Enterprise Release Notes** provide additional information about the current release, including release features and any known issues. A current copy of the release notes is posted at:

[http://customers.sagenorthamerica.com/irj/go/km/docs/sageKM/Assets/Sage\\_Timberline\\_Enterprise\\_10.0\\_Release\\_Notes.pdf](http://customers.sagenorthamerica.com/irj/go/km/docs/sageKM/Assets/Sage_Timberline_Enterprise_10.0_Release_Notes.pdf)

If any important issues were found immediately prior to release that were not included in any of the release documentation, they will be described in an *Important Document* that is included in your installation materials.

### Support Knowledgebase

Access the Sage Knowledgebase 24 hours a day, 7 days a week, for answers to your questions about **Sage Timberline Enterprise**. It is available at:

<https://customers.sagenorthamerica.com/irj/portal/anonymous/login>.

### Online Help

Each **Sage Timberline Enterprise** module includes online help, which provides answers to many of your questions. To use help, from the **Sage Timberline Enterprise** Desktop, select Help, and then choose the module for which you want further assistance.

More often, you will want to access the help links in the various **Sage Timberline Enterprise** windows. Press F1 at any point to display the help topics for that window.

Each help project includes a full table of contents that describes the features and functions of the module. The help also includes index and search capability so you can find the information you need. For more information on using the help system, see **Sage Timberline Enterprise** Desktop help (in the Desktop, select Help > Sage Timberline Enterprise Desktop Help).

Each help topic displays a help feedback section, where you are invited to tell us whether the topic was helpful, and to provide additional comments to assist us in improving our help system.

## Enroll in Training Classes

Sage University offers online training sessions to help you get the most out of your Sage Timberline Enterprise software. To access Sage University, from the Sage Timberline Enterprise Desktop, select **Help > Sage Timberline Enterprise on the Web > Sage Software University** or visit [www.sageu.com](http://www.sageu.com).

## Contact Customer Support

If your service plan provides online customer support, you can contact us through the Web:

1. Log on to <https://customers.sagenorthamerica.com/irj/portal/anonymous/login>.
2. Click **Support > Self Service**.
3. On the **My Requests** tab under **Create**, click **Customer Support Ticket**.
4. Complete the form to submit a support ticket directly to Customer Support.

### Telephone Support

If your service plan provides telephone assistance and you prefer to speak to Customer Support, call us at 800-866-8049. Our hours are Monday through Friday from 6 a.m. to 5 p.m. Pacific Time.

### Upgrade Your Service Plan

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

1. Call 800-991-5606, or log on to <https://customers.sagenorthamerica.com/irj/portal/anonymous/login>.
2. Select **Anonymous Portal Access** on right.
3. Click **Support > Self Service**.
4. On the **My Requests** tab under **Create**, click **Customer Service Request**.
5. Complete the form to submit a service request.

## Submit Enhancement Requests

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