Get Started

Document Management 9.6.1

sage

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Document Management Get Started

Section 1

Overview

Document Management is an application that electronically stores, organizes, shares, and retrieves your documents.

Document Management accepts all documents that can be printed or scanned. It stores these documents in a DocuVault® database that maintains original copies of the documents even though you might print, e-mail, fax, send, or classify the documents dozens of times.

Document Management organizes documents based on information that you enter in a **Classification** pane. In this pane, you assign classifications such as the job number or property name to a document. If you own other Sage Timberline Office applications, you can select from Sage Timberline Office data, which makes the classification process even faster and more consistent.

Document Management shares documents through its send and e-mail features. You can send documents to the inboxes of other Document Management operators (in which case they can further classify the documents), or you can e-mail documents to anyone.

Document Management retrieves documents based on both classification fields and document text. For example, you can retrieve documents that are for a specific job or property and that contain the word *concrete*.

In summary, Document Management offers secure storage, many ways to classify documents, communication features, and timesaving queries. It is a powerful ally in a document-filled business world.

New Features

Document Management 9.6.1 contains the following new features:

- **Native File Formats**—You can import, route, and work with documents created using Microsoft Office in the original file format. For example, if you import an Excel spreadsheet, you can now open it and work with it in Excel. Document Management retains the original .xls format.

NOTE: The native file format feature is compatible with Microsoft Office 2003 and later.

IMPORTANT: In order to work with native file formats, you must install Microsoft Office 2003 or later on your DocuVault server *before* you install Document Management 9.6.1.

- **Streamlined Accounts Payable Workflow**—When linking to an existing invoice from **Classification** > [**AP Invoice Details**], you are now given the option to link or link with changes. If you link with no changes, the Enter Pending Invoices window will not be launched.

- **64-bit Compliance**—Both Document Management 9.6.1 and DocuVault 9.6.1 are now 64-bit compliant.

The following enhancements were made to the 9.5 release of Document Management:

- **Increased Security Features**—Document Management security has been enhanced so that you can add security to queues, documents, document types, and tasks.

- **AP Invoice Distribution Details Dialog**—You can now view a linked invoice distribution details grid from within Document Management. This allows you to view the distribution details without leaving Document Management to do so. When viewing distribution details from within DM, you can now right-click on a column to select which fields to view, you can drag and drop columns to new locations, and the selected columns and their location setup will be retained at the workstation.

- **Additional Paper Sizes Available**—You can now access larger paper sizes. New sizes include:

  - ARCH A 228.6 mm x 304.8 mm (9" X 12")

  - ARCH B 304.8 mm x 457.2 mm (12" X 18")

  - ARCH C 457.2 mm x 609.6 mm (18" X 24")

- ARCH D 609.6 mm x 914.4 mm (24" X 36")

- ARCH E 914.4 mm x 1219.2 mm (36" X 48")

- **User Account Control**—A new security scheme has been implemented with this release. The Windows User Account Control (UAC) security scheme has been incorporated into Sage Timberline Office. To comply with UAC security requirements, many Sage Timberline Office folders have been moved from the Program Files folder to a shared folder with this release.

- **Sage System Verifier**—A new verification utility was introduced in 9.5. The Sage System Verifier (SSV) checks conditions prior to installation of the CD and runs immediately after to verify the installation has been successful. You are notified if any errors are found during the checks.

Additional Documentation

You can find additional information about setting up Document Management by inserting your Document Management 9.6.1 CD and then browsing to the **Documents** folder. You will find the DM_Technical_System_Reference.pdf. This document provides system and environment considerations to ensure your network is ready to install Document Management. You will also find what you need to prepare before you install.

Section 2

System Requirements

NOTE: This information requires advanced knowledge of your network. Contact your system administrator for assistance.

Domains

You must install Document Management on a client/server network that is part of a domain and has domain services provided by a Windows server. A domain consists of a collection of computers on a Microsoft Windows Server network that share a common domain database and security policy.

Restrictions:

- You cannot install Document Management on a peer-to-peer network.

- You cannot install Document Management on a stand-alone computer.

Terminal Services

You can use Document Management and DocuVault with Terminal Services. For more information, consult the *Technical System Reference for Document Management*, which is located on your CD under **Documents > DM_Technical_System_Reference.pdf**.

NOTE: DocuVault is the database that the Document Management application uses to store the documents.

Sage Timberline Office Software

You must install one or more of the following CDs before you install Document Management:

- Accounting and Management Products 9.6

- Estimating Products 9.6

NOTE: Although you must be using Accounting and Management 9.4.x in order to upgrade to Accounting and Management version 9.6, you can upgrade Document Management directly from version 9.1.3 after your Accounting and Management upgrade is complete.

IMPORTANT: Before you install Document Managment, check with your Business Partner to ensure you have access to the latest updates of Accounting, Estimating, and Document Management.

Operating Systems

Document Management can be installed on these operating systems:

- Windows Server 2008 Enterprise Edition

- Windows Server 2008 Standard Edition

- Windows Server 2003 Enterprise Edition R2, SP2

- Windows Server 2003 Standard Edition R2, SP2

- Windows Server 2003 Small Business Server R2, SP2

- Windows Vista (Business and Ultimate), SP1

- Windows XP Professional, SP3

- Terminal Services

NOTE:

- The DocuVault database can be installed on a 32-bit server-class operating system such as Windows Server 2003 or a 64-bit server-class operating system such as Windows Server 2008.

- Both Document Management and DocuVault are now compliant with 64-bit operating systems.

□ If you install DocuVault on Windows Server 2008 and use MS Office 2007, you must configure DocuVault to run under an administrative user account after you install. For more information see "Specify an Administrator Account for Windows Server 2008," on page 13.

File System

The computer that contains DocuVault must use the Microsoft Windows NTFS file system.

Processor

2 GHz minimum processor speed is required for the server that contains DocuVault and for the workstations using Document Management.

RAM

2 GB RAM minimum is required for the server that contains DocuVault and for the workstations using Document Management.

Hard Disk Space

The following table lists hard disk space requirements for Sage Timberline Office. Calculate your hard disk space requirement based on your applications.

IMPORTANT: Do not install Sage Timberline Office products until you have sufficient space available.

Server or Stand-Alone Computer

Product	Available Hard Disk Space	Purpose and Considerations
Document Management	Up to 200 MB	For program files. Depends on configuration.
Accounting and Management Products	Up to 1100 MB	For program files. Depends on the number of applications installed.
Estimating Products	Up to 650 MB	For program files.

Product	Available Hard Disk Space	Purpose and Considerations
Residential Management	Up to 580 MB	For program files.
Third-Party Components	Up to 400 MB	Installed by Sage Timberline Office as necessary.

Workstation

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

Other Requirements

- 17-inch monitor at 1024 x 768 resolution recommended

- CD-ROM drive

- Scanner that is TWAIN compliant (required to scan documents)

- USB port at server for USB security key

Section 3

Install to a Server

A. Before You Install

1 Back up all Sage Timberline Office program and data files.

2 Install MS Office 2003 or later on the DocuVault Server. If you wish to import, route, and work with documents such as Word and Excel in the original file format, you must install MS Office on the DocuVault server *before* installing DocuVault 9.6.1 and later.

A time-consuming workaround exists should you skip this step and subsequently wish to use native file functionality. See ("Work with Native Files," on page 29) for more information.

3 In Windows Server 2008, configure the firewall to allow Cypress port communication. This will allow the printer driver to function for native file documents. To open this port:

a Use an administrator account to log on.

b Click **Start** > **Run**. Enter "wscui.cpl" and then click [**OK**].

c In **Windows Security Center**, click **Windows Firewall**.

d Click **Change firewall settings**. On the **Exceptions** tab, click **Add Port**.

e Enter "Cypress Port" for the **Port Name** and enter "11488" in the **Port Number**. Select **TCP/IP**.

f Verify that **Cypress Port** is listed and selected in the **Exception** tab.

g Click [**OK**].

4 Activate Internet Information Service (IIS)—DocuVault 9.6.1 and later requires IIS to be installed and active on the DocuVault server. IIS may be installed with a computer's operating system. Even though it is installed, it may be inactive.

Verify that IIS is installed and active on the DocuVault server:

a Open **Control Panel** > **Administrative Tools** > **Internet Information Services**.

b Verify that (**Local computer**) > **Web Sites** > **Default Web Site** is present and started.

If IIS is not already installed on the DocuVault server, you can install it from your original operating system CD. If the CD is unavailable, you can download IIS from www.microsoft.com. Download the version of IIS that is compatible with your operating system:

OS Version	IIS Version
Windows XP	5.1
Windows Server 2003	6.0
Windows Server 2008	7.0
Windows Vista	7.0

5 Quit all programs and services for the duration of the installation. This includes programs that may be running in the background such as antivirus, e-mail, and backup programs.

IMPORTANT: If you are upgrading Document Management:

- Back up all Document Management data. For more information, see the *Technical System Reference for Document Management*. It is located on your CD under **Documents > DM_Technical_System_Reference.pdf**.

- You must first install Sage Timberline Office before you install Document Management. Performing the Sage Timberline Office data upgrade before installing Document Management is optional.

- Do not remove the USB security key at any time before or during the installation of Document Management.

- Locate your registration name and activation code. To find your activation codes, log on to www.sagetimberlineonline.com and then select **My Profile** > **Profile** > **Applications** or call 800-848-4173.

6 Begin an upgrade of Document Management with step 2 of "Install DocuVault" on page 11.

NOTE: Document Management tasks (Inbox, Scan, and Queries) may not appear if you log on to Windows and Sage Timberline Office with different login information. Make sure that you log on to Windows using the same user name and password that is associated with your Sage Timberline Office user name.

B. Install to a Server

Install DocuVault

1 Decide where you want to install DocuVault. Typical installations are described below:

- □ If you have Accounting and Management products, install DocuVault to the server that contains Accounting and Management product databases. (This may be a server that contains Estimating items databases as well.)

- □ If you have only Estimating products, install DocuVault to a server that contains the Estimating items databases.

- □ You can otherwise install DocuVault on the server of your choice.

NOTE: When you install DocuVault, the folder you enter as your Destination Folder will include the Document Management database. Make sure that the location of this Destination Folder has the available drive space that will support future database growth.

NOTE: In addition, you can install DocuVault on a server that does not contain Sage Timberline Office. You must provide the server name during the installation of Document Management.

2 At the server that will contain DocuVault, log on with full administrative rights.

Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard disks).

If you do not know whether you have full administrative rights, ask your network administrator for assistance. You can also ask your network administrator to log on with the network administrator ID before you start the installation.

3 Insert the Document Management 9.6.1 CD into the CD-ROM drive of the server. The **Sage Timberline Office** window should appear.

If the **Sage Timberline Office** window does not appear, click [**Start**] > **Run**. In the **Run** window, click in the **Open** box and type D:\Install.exe; then click [**OK**]. (D:\ represents your CD-ROM drive.)

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

4 In the **Sage Timberline Office** window, click **2 Install DocuVault®**; then follow the instructions in the resulting windows.

5 At the end of this part of the installation, an **InstallShield Wizard Completed** window appears. Click [**Finish**].

NOTE: If you are upgrading Document Management, skip ahead to step 10.

6 A **Document Management Uses and Registration** window appears next. Attach the USB security key to a USB port on your server.

7 The **Welcome to the Found New Hardware Wizard** window appears. Accept the **Install the software automatically (Recommended)** option; then click [**Next**].

8 A **Hardware Installation** window appears that says the software has not passed Windows Logo testing or does not contain a Microsoft digital signature. Click [**Continue Anyway**] or [**Yes**].

9 After a few minutes, the **Completing the Found New Hardware Wizard** appears. Click [**Finish**].

10 A **Document Management Uses and Registration** window that contains **Registration name** and **Activation code** boxes appears. Type the registration name and activation code provided on your packing list; then click [**Activate**].

11 A **Document Management Uses and Registration** window that says **You have successfully activated Document Management** appears. Click [**Finish**].

Specify an Administrator Account for Windows Server 2008

To successfully convert documents that are captured as native files from Microsoft Office applications in a Windows Server 2008 environment, you must reconfigure DocuVault to run under an administrator's account:

1 Open **Control Panel** > **Administrative Tools** > **Services.**

2 Double-click **Cypress DocuVault** and open the **Log on** tab.

3 Select **This account**.

4 Enter or browse to the name of a user who has administrative rights. Enter their password.

5 Click **Stop** the service.

6 Click **Start** the service.

Install Document Management

If you have only Estimating products and Estimating is not installed on this server, skip to "Set Up the DocuVault Printer Driver" on page 14.

Install Document Management at the server that contains Sage Timberline Office Accounting and Management products.

If you installed DocuVault onto a server that does not contain Sage Timberline Office Accounting and Management products, remove the Document Management CD from this server and insert it into the CD-ROM drive of the server that contains the Sage Timberline Office Accounting and Management products. The **Sage Timberline Office** window should appear. If the **Sage Timberline Office** window does not appear, click [**Start**] > **Run**. In the **Run** window, click in the open box and type **D:\Install.exe**; then click [**OK**]. (D:\ represents your CD-ROM drive.)

1 In the **Sage Timberline Office** window, click **3 Install Document Management**. Follow the instructions in the resulting installation windows.

NOTES:

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

▪ If you installed DocuVault to a server that does not contain Sage Timberline Office Accounting and Management products, a **DocuVault Location** window appears. In this window, type the name of the server that contains DocuVault, and then click [**Next**].

2 During the installation, an **Enable CD/DVD Burning Feature** window appears. To install this feature, which lets you burn documents to a CD or DVD, you must click the **X** drop-down arrow and then select **This feature will be installed on local hard drive.** After you decide whether to install this feature, click [**Next**].

NOTE: If you are upgrading Document Management and the CD/DVD Burning Feature is currently installed, you must choose to install this feature.

3 At the end of this part of the installation, an **InstallShield Wizard Completed** window appears. Click [**Finish**].

Set Up the DocuVault Printer Driver

1 In the **Sage Timberline Office** window, click **4 Set Up DocuVault printer driver**.

2 A **DocuVault Printer Driver Setup** window appears. Click [**Start**].

3 A **Hardware Installation** window appears that says the software has not passed Windows Logo testing or does not contain a Microsoft digital signature. Click [**Continue Anyway**] or [**Yes**].

4 A **DocuVault Printer Driver Setup** window appears that says **You have successfully installed the DocuVault printer driver.** Click [**Finish**].

Final Installation Steps

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

2 Continue with the next section, "Install to a Workstation" on page 15.

Section 4

Install to a Workstation

A. Before You Install

IMPORTANT: If you are upgrading Document Management, you must upgrade Sage Timberline Office applications before you upgrade Document Management.

1 Back up all Sage Timberline Office application and data files.

2 Quit all programs and services for the duration of the installation. This includes programs that may be running in the background such as antivirus, e-mail, and backup programs.

3 Decide which installation instructions to follow in this section. Your choices are:

   □ "B. Install to a Workstation That Has Accounting and Management Products." This also applies to workstations that have Accounting and Management products and Estimating products.

   □ "C. Install to a Workstation That Has Only Estimating Products" on page 18.

NOTE: Document Management tasks (Inbox, Scan, and Queries) may not appear if you log on to Windows and Sage Timberline Office with different login information. Make sure that you log on to Windows using the same user name and password that is associated with your Sage Timberline Office user name.

B. Install to a Workstation That Has Accounting and Management Products

At a workstation that has Accounting and Management products (and possibly Estimating products as well), install the Document Management client and set up the DocuVault printer driver. Start this installation and setup procedure from a file on the server, as described below.

Install the Document Management Client

1 At the workstation, log on with full administrative rights.

Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard disks).

If you do not know whether you have full administrative rights, ask your network administrator for assistance. You can also ask your network administrator to log on with the network administrator ID before you start the installation.

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

3 In the **Run** window, click [**Browse**].

4 In the **Browse** window, browse to the mapped drive on the server that you used to install accounting and management products. For example, browse to X:\9.5\Accounting\WININST\dmClient\Install.exe (X:\ represents your mapped drive).

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

NOTE: To simplify any server migration process that might take place, we recommend the use of mapped drives for this step. However, you may also use a UNC path. For example, if you choose to use a UNC path to the shared data folder, the UNC path is \\[Server name]\Timberline Office\9.5\Accounting\WinInst\dmClient\Install.exe.

5 Click [**Open**]; then click [**OK**].

6 In the **Sage Timberline Office** window, click **2 Install Document Management**. Follow the instructions in the resulting installation windows.

7 During the installation, an **Enable CD/DVD Burning Feature** window appears. To install this feature, which lets you burn documents to a CD or DVD, you must click the **X** drop-down arrow and then select **This feature will be installed on local hard drive.** After you decide whether to install this feature, click [**Next**].

NOTE: If you are upgrading Document Management and the CD/DVD Burning Feature is currently installed, you must choose to install this feature.

8 At the end of this part of the installation, an **InstallShield Wizard Completed** window appears. Click [**Finish**].

NOTE: If you installed Document Management on a Microsoft Vista workstation, and you chose the DM CD-ROM burning feature, you must install a separate system driver (Gear Driver) for Microsoft Vista compatibility. Document Management operates without the driver installed, but you will need the driver when you use the CD-ROM burning feature. This driver should be installed only after you install Document Management. Please see the appropriate Web site for further information (www.gearsoftware.com).

Set Up the DocuVault Printer Driver

1 In the **Sage Timberline Office** window, click **3 Set Up DocuVault printer driver**.

2 A **DocuVault Printer Driver Setup** window appears. Click [**Start**].

3 A **Hardware Installation** window appears that says the software has not passed Windows Logo testing or does not contain a Microsoft digital signature. In this type of window, click [**Continue Anyway**] or [**Yes**].

4 A **DocuVault Printer Driver Setup** window appears that says **You have successfully installed the DocuVault printer driver.** Click [**Finish**].

5 After you finish the installation, be sure to log off of the workstation and then log back on.

Final Installation Steps

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

2 Repeat steps in this "B. Install to a Workstation That Has Accounting and Management Products" section for each workstation that has Accounting and Management products.

C. Install to a Workstation That Has Only Estimating Products

At a workstation that has Estimating products but not Accounting and Management products, install Document Management and set up the DocuVault printer driver from the CD.

Install Document Management

1 At the workstation, log on with full administrative rights.

Full administrative rights are defined as write access to the Windows registry and all folders on the computer (including rights to the root of all hard disks).

If you do not know whether you have full administrative rights, ask your network administrator for assistance. You can also ask your network administrator to log on with the network administrator ID before you start the installation.

2 Insert the Document Management CD into the CD-ROM drive of the workstation. The **Sage Timberline Office** window should appear.

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

If the **Sage Timberline Office** window does not appear, click [**Start**] **> Run**. In the **Run** window, click in the **Open** box and type D:\Install.exe; then click [**OK**]. (D:\ represents your CD-ROM drive.)

3 In the **Sage Timberline Office** window, click **3 Install Document Management**. Follow the instructions in the resulting installation windows.

NOTE: Do not click **2 Install DocuVault®.** DocuVault has already been installed to a server in "Section 3" on page 9.

4 A **DocuVault Location** window appears. In this window, type the name of the server that contains DocuVault.

5 During the installation, an **Enable CD/DVD Burning Feature** window appears. To install this feature, which lets you burn documents to a CD or DVD, you must click the **X** drop-down arrow and then select **This feature will be installed on local hard drive.** After you decide whether to install this feature, click [**Next**].

NOTE: If you are upgrading Document Management and the CD/DVD Burning Feature is currently installed, you must choose to install this feature.

6 At the end of this part of the installation, an **InstallShield Wizard Completed** window appears. Click [**Finish**].

Set Up the DocuVault Printer Driver

1 In the **Sage Timberline Office** window, click **4 Set Up DocuVault printer driver**.

2 A **DocuVault Printer Driver Setup** window appears. Click [**Start**].

3 A **Hardware Installation** window appears that says the software has not passed Windows Logo testing or does not contain a Microsoft digital signature. In this type of window, click [**Continue Anyway**] or [**Yes**].

4 A **DocuVault Printer Driver Setup** window appears that says **You have successfully installed the DocuVault printer driver.** Click [**Finish**].

5 After you finish the installation, be sure to log off of the workstation and then log back on.

Final Installation Steps

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

2 Repeat steps in this "C. Install to a Workstation That Has Only Estimating Products" section for each workstation that has estimating products but not accounting and management products.

Section 5
Use Document Management

This section contains the following topics:

- "Set Up Document Management" beginning on this page.

- "Print or Scan an Item Into Document Management" on page 25.

- "Scan a Document" on page 26.

- "Classify a Document" on page 26.

- "Send a Document From the Inbox or Query Results Windows" on page 27.

- "Retrieve a Document" on page 28.

- "Work with Native Files" on page 29.

Set Up Document Management

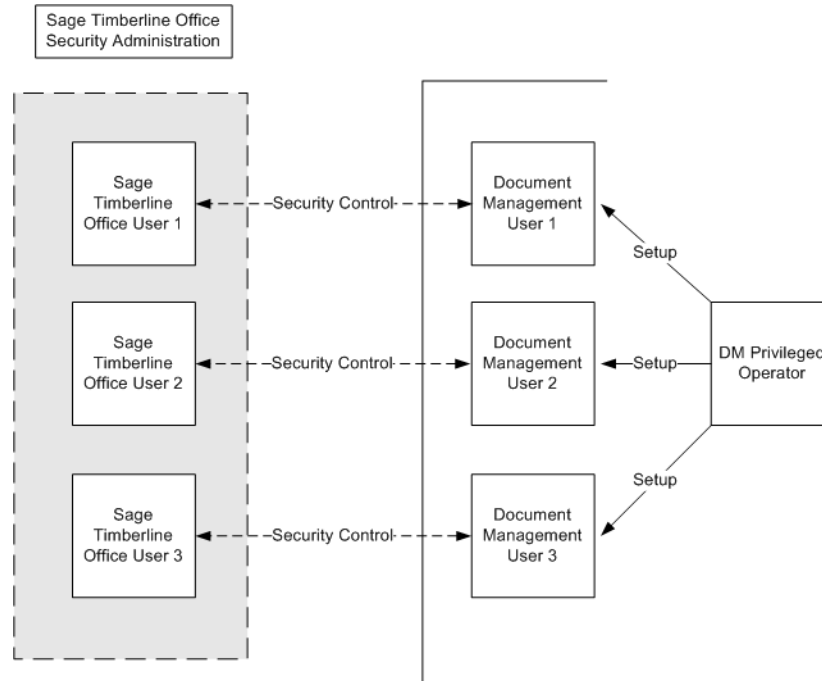### 1. Set Up Sage Timberline Office Security

Beginning with version 9.5, you are required to enable Sage Timberline Office Security Administration before you can manage DM users and configure DM security. The Sage Timberline Office Security Administration includes two roles: a Security Administrator and an Application Administrator. The person setting up DM must be a member of both roles to configure DM users and settings in DM.

When you set up Sage Timberline Office Security Administration, ensure you assign the DM privileged operator responsible for configuring DM users and settings to both roles.

The Sage Timberline Office Security Administration is available from Desktop.

There are two setup paths to take:

- If you have already been using Sage Timberline Office Security Administration in version 9.4.x, a wizard will guide you through the process of mapping existing DM users to Sage Timberline Office users. You can then manage DM users and configure DM security as normal in DM. For more information, skip to "2. To set up Document Management" on page 23.

- If you do *not* already use Sage Timberline Office Security Administration:

  a Create a corresponding user account in Sage Timberline Office Security Administration for each DM user before you can configure DM. See the *Security Guide* for instructions on creating Sage Timberline Office Security Administration users accounts.

  b After setting up the user accounts in Sage Timberline Security Administration, you must then map the new Sage Timberline Office users to your DM users. Proceed to "2. To set up Document Management" on page 23.

After Sage Timberline Office users have been mapped to DM users, you can then manage DM users and configure DM security as normal in DM.

NOTE: Document Management tasks (Inbox, Scan, and Queries) may not appear if you log on to Windows and Sage Timberline Office with different login information. Make sure that you log on to Windows using the same user name and password that is associated with your Sage Timberline Office user name.

2. To set up Document Management

1 Click [**Start**] **> Programs > Sage Software > Sage Desktop**.

2 In the **Tasks** pane, open the **Sage Timberline Office** > **Document Management > Setup Wizard** task.

NOTE: If Sage Timberline Office security is active, you must be a Security and Application Administrator in the Sage Timberline Office security system to see the **Setup Wizard** task. To learn more about Sage Timberline Office security, from the Desktop **Help** menu, select **Application Help > TS-Main**. On the **Content** tab of the **Help Topics: TS-Main** window, open the **Security > What do you want to do?** topic.

NOTE: If the **Setup Wizard** has already been completed you can open **Document Management > Settings**, select **Operators** in the list on the left of the **Settings** window, and skip to <u>step 6</u>.

3 Close the **Tasks** and **My Tasks** panes by clicking the close button in the title bar of each pane. The **Setup Wizard** now appears in the entire **Desktop** window.

4 Click [**Next**]. The **Documents** step appears. The document groups are selected based on the Sage Timberline Office applications you have installed.

5 Click [**Next**]. The **Operators** step appears.

6 In the **Available operators** list select the users who require access to Document Management. Click [**Add**]. The selected names move to the **Document Management operators** list.

NOTE: The list of **Available operators** displays all of the Sage Timberline Office users that have been set up to include network credentials. You can select multiple users by holding the CTRL key while selecting the user names. If a name does not appear in the list, that Sage Timberline Office user may not be set up with proper Windows credentials. Work with your network administrator to create an account for that person.

7 Click [**Next**]. The **Privileged Operators** step appears.

8 From the **Document Management operators** list, select the operators to set as **Privileged operators**. Click [**Add**]. The operator's name then appears in the **Privileged operators** box.

Privileged operators have unlimited permissions in Document Management, including access to all documents entered in Document Management. You must select at least one privileged operator.

9 Click [**Next**]. The **Power Operators** step appears.

Power operators have all the same rights as an operator with added administration rights. Power operators can manage the list of operators, but are restricted from managing document security and task security. You are not required to have power operators set up in Document Management.

CAUTION: If you assign a user the rights to be both a power operator and a Document Management privileged operator, that person is restricted by power operator rights you assign to that user.

10 Click [**Next**]. The **Operator Details** step appears.

The Name must be filled in for each operator. Enter an E-mail Address for an operator to allow e-mail notification when documents are sent to the operator's inbox.

NOTE: To learn more about security in Document Management select **Help > Application Help > Document Management**. On the **Index** tab of the **Document Management Help** window, type **security** and select **about security in DM** to open the "Learn About Security in Document Management" topic.

11 Click [**Next**]. The **Security** step appears.

In this window, you can set up Operator Level and Document Type security. When you set up Operator Level security, you set rights for the operator or role to secure, view, and route the document. When you set up Document Type security, you select the operators and roles that can access a specific document type.

12 Click [**Next**]. The **Groups** step appears.

Groups are optional, but they allow you to route the same document to multiple operators. For example, creating an Accounts Payable group for your Accounts Payable accountants allows you to route an invoice once to reach all of them.

a Click [**New Group**].

b In the box to the left of the **New Group** button, type a group name, and press ENTER.

    c Select the Document Management operators that you want in the group and click [**Add**].

    d Type an e-mail address in the **Notification e-mail** box. Document Management sends a notification e-mail to the address in the **Notification e-mail** box. You can specify a group e-mail address, but the address cannot contain spaces.

13 Click [**Next**]. The **E-mail** step appears.

To enable e-mail notification for operators, you must enter a valid e-mail **Server**, **Port**, and **Default sender e-mail**. Document Management uses the information in the **Server** and **Port** boxes to connect to your e-mail server. The **Default sender e-mail** becomes the From attribute in a notification e-mail. If you are unsure of this information, contact your network administrator for assistance.

14 Click [**Next**]. The **End** step appears.

15 Click [**Finish**]. Your settings are saved and applied to the Document Management DocuVault.

16 From the **Sage Timberline Office Desktop** toolbar, click the **Show/Hide Tasks** button. The pane now displays **Settings**, **Inbox**, and **Scan** tasks for Document Management.

Print or Scan an Item Into Document Management

1 From any application that supports printing, select a command to print the document.

2 Select the **DocuVault** printer.

3 Print the document.

4 In the resulting window, on the **Destination** tab, open the **Recipient** folder and select a recipient.

Recommended: Send the document to yourself in order to classify it.

5 In the **Location** box, select an inbox.

Recommended: Click the **Settings** tab, and in the **Document Title** box, type a title.

6 Click [**OK**]. The **DTIC Text** window appears.

Recommended: In the **DTIC Text** window, type information in the **Subject** and **Note** fields.

7   Click [**Finish**].

Scan a Document

1   From the **Tasks** pane, open the **Sage Timberline Office** > **Document Management** > **Scan** task.

2   Click ![New Batch icon] the (**New Batch** toolbar button).

3   In the **Image Queue** drop-down list, select a queue. This is the destination folder for your scanned image.

4   In the **Batch Setting** drop-down list, select a batch setting. By default, the **Documents** batch setting has optical character recognition. The **Reports** batch setting does not.

5   In the **Source** area, select the **Scanner** option button.

If the name of your scanner does not appear in the **Scanner** box, click ![Scanner icon] (the **Scanner** button), and choose a scanner from the window that appears.

6   Select the **Show scanner interface** check box if you want to adjust the scanning process.

7   Click [**OK**].

8   If you did not select the **Show scanner interface** check box, the scan happens automatically.

If you selected the **Show scanner interface** check box, your scanner software opens. In this software, adjust the scanning settings, and select the appropriate command to scan the document. In some software, the command is **Scan > Return to Document Management**. After the scan finishes, close the third-party scanning software.

9   The scanned images appear in a queue in the **Scan** window.

Classify a Document

1   Select a document in the **Inbox** or **Query Results** windows, or select a batch in the **Scan** window.

2   If the **Classification** pane is not visible, click ![Classification icon] (the **Classification** toolbar button).

3 In the **Classification** pane, select a document type.

4 Enter information in additional classification fields.

5 Click [**Send to Inbox**] or [**Save**]. The **Send to Inbox** button saves your changes and sends a document ticket to a recipient. The **Save** button saves your changes but does not send a document ticket to a recipient.

Send a Document From the Inbox or Query Results Windows

1 In the tree view of the **Inbox** or **Query Results** window, select the documents or batches that you want to send.

2 Click [**Send to Inbox**] in the Classification pane or click (the **Send To Inbox** toolbar button).

3 In the **Send to Inbox** window, on the **Inbox** tab, click (the **New (Insert)** toolbar button).

4 Select one or more recipients. To select multiple recipients, hold the CTRL key down while you click recipient names.

5 Click [**Add**].

NOTE: You can select numerous other options on the **Inbox**, **Assembly**, and **Notifications** tabs. To learn more about these options, see the Help topic "Send a Document."

6 Click [**Send**]. The document appears in recipients' inboxes in a few moments.

Send a Document From the Scan Window

1 From the **Tasks** pane, open the **Document Management > Scan** task.

2 From the tree view in the **Scan** window, select a batch.

3 Click [**Send to Inbox**] in the **Classification** pane or click   (the **Inbox** toolbar button).

4 In the **Send To Inbox** window, on the **Inbox** tab, click   (the **New (Insert)** toolbar button).

5 In the **Add Inbox Recipients** window, select one or more recipients; then click [**Add**].

NOTE: You can select numerous other options on the **Inbox**, **Assembly**, and **Notifications** tabs. To learn more about these options, see the Help topic "Send a Batch."

6 Click [**Send**]. The document appears in recipients' inboxes in a few moments.

Retrieve a Document

To retrieve a document, select one of the predefined queries; then modify the query as needed.

1 From the **Tasks** pane, open the **Document Management > Query Templates > [*name of query*]** task.

2 In the **Query Designer** window, click a condition row or click the **Add Condition** link.

3 In the resulting condition boxes, enter or modify information.

4 Add, remove, and group conditions as necessary. Right-click a condition to see commands that perform these tasks.

5 Click [**Find Now**]. Results appear in the **Query Results** window.

6 To modify the query further, click [**Return to Conditions**].

7 To save the query, click [**Save**]. In the **Save Query** window, type a name for the query; then click [**OK**]. The query appears in the **Document Management > Queries** folder.

Work with Native Files

Installing Microsoft Office After Installing 9.6.1

The following steps allow you to use native file functionality on currently archived files if you installed DocuVault 9.6.1 before installing Microsoft Office.

1 Delete the native file documents (e.g. Word, Excel, Power Point, text file, pdf, etc.) that were routed before installing Microsoft Office. If you no longer have the original copy, you can right-click and select Save As before deleting each document.

2 Stop the Cypress Service at the DocuVault Server.

    a Open **Control Panel** > **Administrative Tools** > **Services.**

    b Select **Cypress.**

    c Click **Stop the service**.

3 Install MS Office 2003 or later.

4 Restart the Cypress service at the DocuVault server.

    a Open **Control Panel** > **Administrative Tools** > **Services.**

    b Select **Cypress.**

    c Click **Start the service**.

5 Re-scan the documents that you deleted and re-classify them.

Import Native File Documents

To import a native file document into a batch:

1 Click the **New Batch** toolbar button or right-click the Queue tree view, and select **New Batch** from the context menu.

2 Choose a queue from the **Image Queue** drop-down list.

3 Choose batch settings from the **Batch Settings** drop-down list.

4 Select **Native File**.

5 Click the **Browse** button. When the browse dialog displays, browse to the file that you wish to import, select it, and click **Open**. You can select multiple files from the same directory at one time, with each file stored as a separate batch.

6 Click [**OK**].

The batch will be added to the tree view. If the Personal Imaging Module is in Page View mode, thumbnails of the document's pages display in a pane at the right side of the window. If the Personal Imaging Module is in Property View mode, the batch's properties display in that pane.

If you want to convert native files captured through the Personal Imaging Module, select **Administration Tools** > **Parameter** tab > **Option** tab > **Enable Conversion for Personal Imaging** check box.

View Native File Documents

To view a native file document:

1 Select the **Queue** tab at the bottom-left corner of the **Scan Module** window.

2 Select the batch that you wish to view.

NOTE:

A native file document has this icon to the left of the batch name in the tree view.

3 Click [**Launch Application**] on the right side of the window or right-click the Queue tree view, and select **Launch Application** from the context menu.

Section 6
Further Assistance

Sage Customer Portal

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

Sage Knowledgebase

Access the Sage Knowledgebase 24 hours a day, 7 days a week for solutions to over 8,000 Sage Timberline Office topics as well as software alerts, notices, release guides, and year-end information. This is the same online tool our support staff uses when responding to calls from service plan customers.

To access the Knowledgebase, log on to https://customers.sagenorthamerica.com.

After you log on to the Sage Customer Portal, click the Knowledgebase Search link and type a keyword search or click **Advanced Search** for additional search options.

User Forums

Exchange information with Sage Timberline Office customers.

Support Tickets

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

Training Information

Learn about Anytime Learning and Realtime Learning sessions and view schedules of online sessions.

You can directly access Sage University from the Help menu in applications (**Help > Sage Timberline Office on the Web > Sage Software University**). This Web site offers a variety of professional product training options.

Customer Information

Update your individual contact information whenever it is convenient, view applications owned and the number of uses of each application, access activation codes, and view service plan information.

Contact Information

Online Support Request

If you cannot find the answer to your question in the Knowledgebase and your service plan provides online technical support, submit a new support ticket on the Sage Customer Portal. After you log on to https://customers.sagenorthamerica.com, click Self Service > My Requests. Under Create, click Customer Support Ticket, enter the details of your question, and submit the form.

Phone Support

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

Upgrading Your Service Plan

If your service plan does not provide online technical support, you can add or upgrade a service plan by calling 800-858-7098.

NOTES: