Installation Checklist for Sage Timberline Office

Accounting & Management Products 9.7,

Estimating Products 9.7, and Document Management 9.7

Step	Upgrade Instructions	Done
1	Read *Release Notes* and *Installation Guide* for important information regarding this upgrade, including new requirements and detailed installation instructions. You can find these on your DVD in the **Documents** folder.	☐
2	Create a complete backup of all Sage Timberline Office data and program files.	☐
3	Verify that your server and workstations have a DVD drive. The 9.7 Accounting and Management Products and 9.7 Estimating Products are delivered on DVD.	☐
4	Make sure that you install the appropriate operating system service pack level, that there is sufficient hard disk space available, and that your server and workstations meet all other hardware and software requirements before you install Sage Timberline Office products. For example, Accounting and Management Products require up to 1.1 gigabytes (GB) of available hard disk space. See "System Requirements" in *Installation Guide* for more information.	☐
5	Make sure that you have full control of the necessary folders, files, and registry keys on your file server, terminal server, and workstations that will have Sage Timberline Office installed. For a list of the required folders, files, and registry keys for your operating system, see "Access Rights" in the *Installation Guide*.	☐
6	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.	☐
7	If you are running Windows Vista or Windows 7, elevate your permissions. See "Before You Install" in the *Installation Guide* for more information.	☐
8	To ensure security settings are applied to all instances of the same report or inquiry within an application, rename each instance so it has a unique report or inquiry name. See "Before You Install" in the *Installation Guide* for more information.	☐
9	If you use Estimating, uninstall Estimating Products 9.6.x or earlier.	☐
10	If you are upgrading from 9.4.x, have already been using security in Sage Timberline Office, and use Document Management, delete inactive Document Management users before upgrading to 9.7. See "Use Document Management" in *Document Management Get Started* for more information.	☐
11	If you use Accounting, install Accounting and Management Products 9.7 on the server. Be aware that the installation process may restart your server several times.	☐
12	If you installed Accounting, restart the server, log in as the same user that installed the software, open the software, and wait until the configuration process is completed.	☐

13	If you installed Accounting, show hidden files and folders. On Windows XP Professional or Windows Server 2003, open Windows Explorer, select **Tools > Folder Options**, and select **View hidden files and folders** on the **View** tab. On Windows Vista or Windows Server 2008, open Windows Explorer and select **Organize > Folder and Search Options**, and then select **Show hidden files and folders** on the **View** tab.	☐
14	The 9.7 installation now automatically creates a shared **Timberline Office** folder on the server if one does not already exist. Read and write permission are automatically granted to the **Everyone** group. If the **Timberline Office** folder is already present and shared, the installation will skip this step. The system will not change any permissions you have already set up. See "Install to a Server or Stand-Alone Computer" in the *Installation Guide* for the location of this folder on your operating system.	☐
15	If you use Purchasing, Inventory, or Service Management and your company data folder is inside the **Programs Files** folder, move your data to a different location. See "After You Install" in the *Installation Guide* for more information.	☐
16	If you installed Accounting on the server, map a drive on the workstations to the shared folder **Timberline Office** that was created in step 14.	☐
17	If you use Accounting, install Accounting and Management Products 9.7 on the workstations. Be aware that the installation process may restart your workstations several times. If you are upgrading from 9.4x, the location of the Wininst folder has changed. See the *Installation Guide* for the location of this folder.	☐
18	If you use Estimating, install Estimating Products 9.7 on the server and/or the workstations as desired. Be aware that the installation process may restart your server and workstations several times.	☐
19	Restart the workstations, log in as the same user that installed the software, open the software, and wait until the configuration process completes.	☐
20	If you use Document Management, log on as a Privileged Operator and turn on security **(Sage Desktop > Tools > Security Administration)**. If you do not use Document Management, decide whether to turn on security. After turning on security, modify the **Security Settings** to meet your company's requirements. Be aware that it may take you several hours to apply the security settings, depending on the amount of data and number of users. See *Document Management Get Started* and *Security Guide* for more information.	☐
21	If you use Document Management, install Document Management 9.7 on the server and then on the workstations. Be aware that the installation process may restart your server and workstations several times.	☐
22	Restart all programs and services that you shut down for the installation.	☐
23	Open and upgrade your company data folders.	☐
24	If you are upgrading from 9.4.x and have shortcuts to the Sage Desktop or company data folders on your Windows Desktop, update the shortcuts by right-clicking the shortcut and selecting **Properties > Shortcut**. Change the Sage Desktop **Target** field from 1.0 to 2.0 and the company data folder **Start in** field to the UNC path.	☐