

Accordant Bulletin

Welcome to the Accordant Bulletin for Sage Timberline Office users!

September 2008

Each month, our goal is to provide you with tips and tricks to make you an expert in Sage Timberline software. Accordant's consultants will teach you how to improve your productivity and knowledge of this powerful solution.

9.5.0 Release Review

This month's topic is the Sage Timberline Office (STO) 9.5.0 Release for Accounting & Management, Estimating and Document Management. We'll provide an overview of the key parts of the release, a brief overview of the upgrade process and recommendations for completing the upgrade process. There have been numerous fixes to the various modules and their reports – please refer to the following documents, which can be found on the Release 9.5.0 CD in the Documents folder, for more detailed information:

ReleaseNotesAcctMgmt.pdf
TechnicalSystemReference.pdf
Crystal.pdf
SecurityGuide.pdf

Additions, enhancements and revisions

Operating Environments

- Windows Server 2008 (for servers) Vista (for workstations) operating systems, 32-bit versions only (64-bit is not supported) are supported by Timberline starting with CD version 9.5.0, with the exception of Document Management – Document Management cannot be installed to a Windows Server 2008 computer. Timberline Document Management will support server 2008 in version 9.6.
- Many file locations will be changed through the upgrade process. Expect an increase in used disk space on the Windows volume to increase between 750 mb to 1 gb.



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Our Consultant's Corner expert this month is **Dan Henegan**.

Dan comes to Accordant with over 20 years of experience in the construction industry and over 12 years of Timberline experience.

If you would like to reserve Dan as your consultant, please contact Swati Raje, Director of Client Services, at 973-887-8900 x105.

Prerequisite components

The following are new/ revised prerequisite components that will be installed at the server and workstations:

- Visual C++ 8.0 sp1
- Sage System Verification
- .Net 2.0 (upgrade from version 1.1)
- Java Runtime Environment
- Pervasive SQL v9.6 (upgrade from version 8.0)

Sage Desktop

- The default Home Page is <http://www.sagesoftware.com/>.
- There is a new Help search engine built into the Tool Bar.

Accounting & Management

- Security – the STO Security model has been greatly revised to comply with more stringent security requirements. The Security Administrator is available only through Sage Desktop (security settings no longer reside in TS-Main or the applications/modules – exceptions are Inventory, Purchasing or Service Management). Correlations will need to be made between STO and Windows operator accounts.
- Crystal Reports 11.0 – the new Crystal Reports version is 11.0, upgraded from version 10. Version 10 report designs are still supported (upgrades from version 10 to 11 are NOT required).
- ODBC – security points have been added by data file and read/write access through Security Administrator.
- Payroll – the availability of employee Social Security numbers to an STO operator may be restricted through Security settings.
- Project Management – Field Reports entry has been added as an item on the Documents menu.
- Property Management – there is a new Archive Leases ... item on the Tools menu.

Estimating

- Multiple Add-Ons may be added to estimate totals simultaneously.
- An estimate may be initiated utilizing the Last Spreadsheet view.

Document Management (DM)

- Security – DM security is tied to Windows and STO operator credentials. Management of DM security will now reside in the Security Administration application, not DM Settings.
- Document Types – custom document types may be removed from the Document Types list.
- AP Invoice Distribution Details Now Viewable in DM.

Learn more about Sage Timberline Office

Want to attend a classroom training session? Click on the link for a course outline, registration form or more info.

[Report Designer](#)

October 1

[Crystal Reports](#)

October 15-16

[Estimating](#)

October 20-21

[Project Management](#)

October 23

[Construction Accounting](#)

November 3-5

Attend a Webex

Learn more about other powerful tools for Sage Timberline Office. Attend a free online demo!

[Project Management](#)

Friday, October 3rd
10AM Eastern

***To Register: Email**
lsalvas@accordantco.com

[MyAssistant](#)

October 15

[OnScreen Takeoff](#)

September 19, October 3

[Office Connector](#)

September 25, October 2

[TimberScan](#)

September 24, October 1

- Classification Fields – the following additional STO fields are available as Classification Fields in DM: PR Employee Number, PR Employee Name, CM Bank Account, RM Unit, RM Resident.
- Additional Paper Sizes Available – drawing paper sizes (Architectural) A through E are supported for scanning with the 9.5.0 release.

In addition, there have been some fixes in the various modules. Please contact us or review the above noted reference documents that will be found on your CD for specifics.

Upgrade considerations

- CD version 9.4.1 will be supported for Year End 2008 updates, so an upgrade to CD version 9.5.0 is not required for year end processing.
- You will need to be on CD release 9.4.1 prior to upgrading to CD release 9.5.0 .
- Review the following documents contained on your 9.5.0 release
CD: ReleaseNotesAcctMgmt.pdf;
TechnicalSystemReference.pdf; Crystal.pdf;
SecurityGuide.pdf . Share these with your IT resource prior to scheduling your upgrade.
- Review your data (company) folder size for a gauge of time required to perform an upgrade.
- Create a copy or backup of the STO installation folders and files prior to beginning the upgrade process.
- Using STO's File Tools, create a backup of your company's data prior to beginning the upgrade process.
- If STO Security is initiated on your company's system, print out all Security reports prior to beginning the upgrade process.

Recommendations

We highly recommend that due diligence be performed prior to scheduling and performing an upgrade to 9.5.0. The changes are considerable and may entail anything from more/reallocated storage space on your server, to upgrades to your workstations, to more time required than initially anticipated. Our team of consulting experts is ready to assist you in your upgrade to 9.5.0. It is advisable that you not attempt this upgrade without our assistance. If your IT consultant will assist you, it is recommended that the abovementioned documents are thoroughly reviewed prior to the upgrade.

Please contact Swati Raje at 973-887-8900 x105 to discuss scheduling an Accordant consultant.

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- Philadelphia, PA
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SAGE TIMBERLINE OFFICE



November 17-20 | Denver
Colorado Convention Center

Experience the energy at Sage Summit.

Join your dynamic Sage Timberline Office user community at Summit. This is your most important educational event this year and now it's better than ever. Sage Software has expanded the content to provide even more opportunities for you to acquire the knowledge and tools you need to do your job better, faster, and more efficiently.

We at Accordant Company encourage you to attend Summit and take advantage of all this conference has to offer.

Event Highlights:

- New and Improved Breakout Sessions
- Hands-On Labs
- Face-to-Face Support
- Valuable Peer Networking
- Roundtable Discussions
- Trade Show
- Thought-Provoking Speakers

Register early for the best rates. Hurry, the Early Bird rate expires September 29, and online registration ends November 7. And don't forget to enter **Accordant Company** when you register!

Register Today at www.sagesummit.com