



Sage Timberline Office

Get Started

Document Management 9.8



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Chapter 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, email, fax, send, classify or route 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 email 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 email documents to anyone. In addition, you can set up a rules-based routing system that allows you to automate document reviews and approvals.

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 in 9.8

Batch Approval Emails

You can now batch your approval emails. This enables you to receive one email that contains a collection of individual emails instead of receiving a series of individual emails. The batch email is sent periodically based on settings you specify.

You can set up your email batch preferences in **Batches DM > Settings > Operator Details > Routing E-mail Notification** by selecting **Scheduled In Batch** from the list.

You can then use the Windows **Task Scheduler** to schedule the notifications. For more information, see [“Set Up Batch Approval Emails,” on page 30](#).

Compatibility with Office 2010

Document Management is now compatible with the 32-bit version of Microsoft Office 2010.



NOTE: The 64-bit version of Microsoft Office is not compatible with Document Management, as several DM features do not work in that environment. Note, however, that the 32-bit version of Microsoft Office can be installed on 64-bit operating systems. Refer to Microsoft Office documentation for more information.

Additional File Types Can Be Sent as Attachments

The 9.7.1 release included the ability to send attachments from select Sage Timberline Office Project Management tasks to DocuVault. This feature was restricted to certain file types. With the 9.8 release, that restriction is no longer in place. Now, any file type can be sent as an attachment.



NOTE: Only the certain file types can be previewed in Document Management. See [“Send Attachments to DocuVault” on page 30](#) for more information.

Enhancements to the Installation

The installation of Document Management has been restructured to improve the installation, implementation, maintenance, and support of the program.

Additional Documentation

You can find additional information about setting up Document Management in the [Technical System Reference](#). 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.

Chapter 2: System Requirements

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](#).



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 DVDs before you install Document Management:

- Accounting and Management Products 9.8
- Estimating Products 9.8



NOTE: You can upgrade Document Management directly from version 9.4 to 9.8. If you are using a version earlier than 9.4, we recommend that you upgrade to 9.4 before installing 9.8.



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

Operating Systems

The DocuVault database can be installed on a 32 or 64-bit server-class operating system. While the DocuVault database is 64-bit compliant, it does require the Internet Information Services application pool to function in 32-bit mode. For assistance with configuring IIS, see your system administrator.



IMPORTANT: When DocuVault is installed, it will enable 32-bit applications on the DefaultAppPool for IIS. IIS 6.0 does not allow for the creation of separate application pools using 32-bit and 64-bit simultaneously; this will cause an issue if Windows Server 2003 also hosts IIS applications that require a 64-bit application pool. In these cases the DocuVault must be installed on a separate server from the server hosting the application requiring the 64-bit application pool. This is not an issue with IIS 7.0 and later.

If you install DocuVault on Windows Server 2008 and use MS Office 2007 or later, you must configure DocuVault to run under an administrative user account.



NOTE: Within this document, "Windows Server 2008," "Windows 7," and "Windows Vista" refer to all supported editions unless specifically noted.

| Operating System | Minimum Service Pack | DM | DV |
|--|----------------------|----|----|
| Windows Server 2008 Enterprise Edition | SP2 | X | X |
| Windows Server 2008 Standard Edition | SP2 | X | X |
| Windows Server 2008 R2 | | X | X |
| Windows 7 Professional | | X | |
| Windows 7 Ultimate | | X | |

| Operating System | Minimum Service Pack | DM | DV |
|--|----------------------|----|----|
| Windows 7 Enterprise | | X | |
| Windows Server 2003 Small Business Server R2 | SP2 | X | X |
| Windows Server 2003 Enterprise Edition R2 | SP2 | X | X |
| Windows Server 2003 Standard Edition R2 | SP2 | X | X |
| Windows Vista Business | SP2 | X | |
| Windows Vista Ultimate | SP2 | X | |
| Windows XP Professional | SP3 | X | |

Document Management is compatible with both 64 and 32-bit versions for all supported operating systems listed above.

Virtual Environments

For the DocuVault to be used in a virtual environment, you must use a USB redirection program (for example, USB Anywhere) for the virtual machine to use the physical USB protection device. Sage does not offer customer support for USB redirection programs—any support needed must come from the program vendor.

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 Standalone 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. |
| 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
- MAPI-compliant, SMTP server (required for rules-based routing)

Chapter 3: Install to a Server

Before You Install

- 1 Back up all Sage Timberline Office program and data files.
- 2 Install Microsoft 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 Microsoft 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 23](#) 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 **World Wide Web Publishing Service** is present and started.



IMPORTANT: IIS must be installed and active on both your Accounting and DocuVault servers if they are separate.

If IIS is not already installed on the DocuVault or Accounting 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 |
| Windows 7 | 7.5 |

- 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.



CAUTION: If you are upgrading Document Management:

- Back up all Document Management data. For more information, see the [Document Management Technical System Reference](#).
- 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. You can find your activation codes online. Log on to <https://customers.sagenorthamerica.com> and click **Support > Self-Service > My Products**. Expand your product suite, and click **View Details**.

- 6 Begin an upgrade of Document Management with [step 2](#) of the "Install DocuVault" section that follows.



NOTES:

- 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.
- In addition, the tasks do not appear if the **Allow IIS to control password** check box is not selected for authentication control in Internet Information Services (IIS). Ask your system administrator to ensure that IIS is configured correctly to enable IIS to control the password.

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.

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. IIS must be active on both servers. See [step 4](#) in the preceding section for information on how to activate IIS.

2 Attach the USB security key to a USB port on your server.

3 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.

4 Download the software. For details about downloading, see [Knowledgebase article KB980](#).



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

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

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

7 A **Document Management Uses and Registration** window appears next. Enter your user name and password. Click **[Apply]**. After validation is successful, click **[Next]**.

User name—The user name you enter here will be set up as the DocuVault administrator for function and maintenance. Click **[Browse]** to open a window that lists all users on the domain. Select a user with local administrative privileges on the DocuVault server.

Password—Enter the password that you used when you set up this user name as an administrator.

The password you enter here does not expire. You must update this password manually if your system requires a periodic password change. To change the Document Management administrator password manually:

a Log on to the DocuVault server.

b From the **Start** menu, open **Programs > Sage > Sage Timberline Office > Reporting and Other Tools > Document Management > Change Uses and Registration**.

c Enter the new system password.

If your group policy does not allow you to change the logon account for the Cypress service, you can manually change the credentials and restart the service:

a From the **Start** menu, open **Control Panel > Administrative Tools > Services**.

- b** Right-click on **Cypress** and select **Properties > Logon**.
 - c** Select **This account**, and enter the user name and password.
 - d** Close the **Properties** window.
 - e** Right-click **Cypress**, and select **Restart**.
- 8** Enter your **Registration name** and **Activation code** and click [**Activate**]. After your software is activated successfully, click [**Close**].
- 9** The **Welcome to the Found New Hardware Wizard** window appears. Accept the **Install the software automatically (Recommended)** option; then click [**Next**].
- 10** 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**].
- 11** After a few minutes, the **Completing the Found New Hardware Wizard** appears. Click [**Finish**].

Install Document Management

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

- 1** Download the software. For details on downloading, see [Knowledgebase article 980](#).



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, select **This feature will be installed on local hard drive**. After you decide whether to install this feature, click [**Next**].
- If you are upgrading Document Management and the CD/DVD burning feature is currently installed, you must choose to install this feature.
 - If you use a 64-bit operating system such as Windows Server 2008, you must manually install the driver to burn documents to CD or DVD:
 - a** Open the **Gears** folder:
 - On Windows 2008, open **C:\programdata\Sage\DocumentManagement\Gears**.
 - On Windows 2003, open **C:\Documents and Settings\All Users\Application Data\Sage\DocumentManagement\Gears**.
 - b** Double-click **Driver_installer_x86_x64_.exe** and follow the prompts.
- 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 **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, [“Chapter 4: Install to a Workstation.”](#)

Chapter 4: Install to a Workstation

Before You Install



CAUTION: 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.



NOTES:

- 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.
- In addition, the tasks do not appear if the **Allow IIS to control password** check box is not selected for authentication control in Internet Information Services (IIS). Ask your system administrator to ensure that IIS is configured correctly to enable IIS to control the password.

Install to a Workstation

At a workstation that has Accounting and Management products (and possibly Estimating products), 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.



NOTE: Beginning with the 9.8 release of Sage Timberline Office, the Accounting workstation installation no longer includes an option to perform a partial install to integrate with Estimating. Full Accounting installations are now required for Estimating-only workstations. This is to ensure that the security options required by Document Management are available. For more information, refer to the *Accounting and Estimating Installation Guide*.

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** (where "X" represents your mapped drive).

Install to a Terminal Server

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. 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**.

- 1 Click [**Open**]; then click [**OK**].
- 2 In the **Sage Timberline Office** window, click **Install Document Management**. Follow the instructions in the resulting installation windows.
- 3 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 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.

- 4 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 **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 these steps for each workstation.

Chapter 5: Use Document Management

This section contains the following topics:

- [“Set Up Document Management” on page 17](#)
- [“Print or Scan an Item Into Document Management” on page 20](#)
- [“Scan a Document” on page 21](#)
- [“Classify a Document” on page 21](#)
- [“Send a Document From the Inbox or Query Results Windows” on page 21](#)
- [“Retrieve a Document” on page 22](#)
- [“Work with Native Files” on page 23](#)
- [“Set Up and Work With Rules-Based Routing” on page 24](#)
- [“Set Up Batch Approval Emails” on page 30](#)
- [“Send Attachments to DocuVault” on page 30](#)

Set Up Document Management

Set Up Sage Timberline Office Security

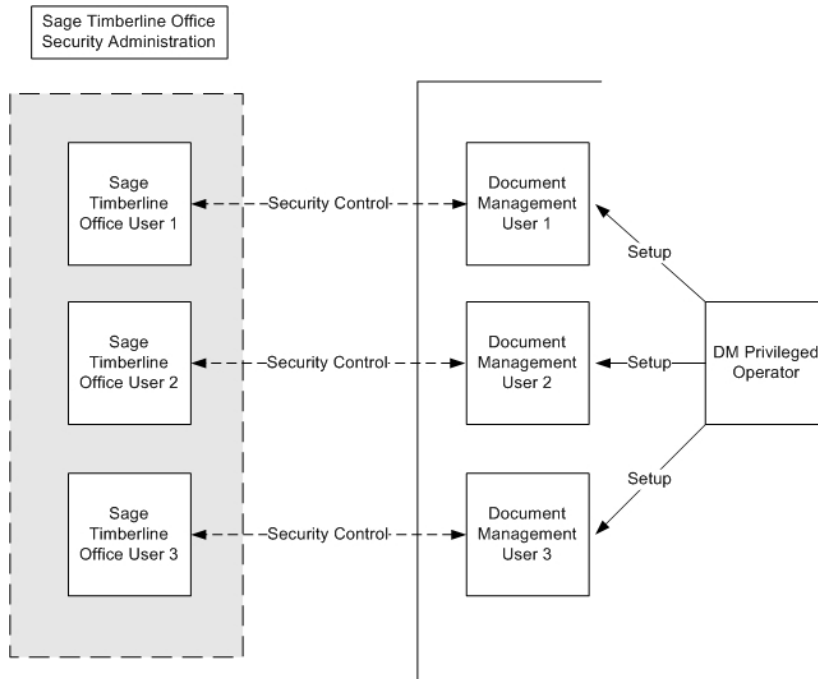
Beginning with version 9.5, you are required to enable Sage Timberline Office Security Administration before you can manage Document Management (DM) users and configure DM security. The Sage Timberline Office Security Administration includes two roles: a Security Administrator and an Application Administrator.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

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 or later, 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 Document Management. See [“Set Up Document Management” on page 17](#) for more information.



- 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 [“Set Up Document Management,” on page 17.](#)

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.



NOTES:

- 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.
- In addition, the tasks do not appear if the **Allow IIS to control password** check box is not selected for authentication control in Internet Information Services (IIS). Ask your system administrator to ensure that IIS is configured correctly to enable IIS to control the password.

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.

**NOTES:**

- 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.
 - 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 [step 6](#).
- 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.
- 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.



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.

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

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

To enable email notification for operators, you must enter a valid email **Server**, **Port**, and **Default sender e-mail**. Document Management uses the information in the **Server** and **Port** boxes to connect to your email server. The **Default sender e-mail** becomes the **From** attribute in a notification email. 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  (the **New Batch** toolbar button).
- 3 In the **Image Queue** list, select a queue. This is the destination folder for your scanned image.
- 4 In the **Batch Setting** 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  (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  (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 or later

The following steps allow you to use native file functionality on currently archived files if you installed DocuVault 9.6.1 or later 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 Microsoft 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** list.
- 3 Choose batch settings from the **Batch Settings** 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.



NOTE: The first time you attempt to convert a native file on Windows Server 2008 R2, the conversion process may stop. No message is given. To continue, close the conversion window and Document Management, then restart your computer. Native files will now convert normally.

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.

The types of files that can be previewed are restricted to the following:

- ASCII : *.txt
- Microsoft Excel : *.xls, *.xlsx
- Microsoft PowerPoint : *.ppt, *.pptx
- Microsoft Word : *.doc, *.docx
- PDF : *.pdf
- RTF : *.rtf
- Image types : *.jpeg, *.png, *.bmp, *.tif, *.tiff, *.jpg, *.gif

Set Up and Work With Rules-Based Routing

Rules-based routing lets you set up automated processes that suit your business and help you increase productivity and accountability. You can define rules of communication for various documents that your company processes.

Before You Begin

Before you begin setting up routing lists in your Document Management software, we recommend that you identify your business processes for routing documentation. For example, what types of documents do you route? Who can review and approve documents? How much is each recipient allowed to approve?

Additional requirements

- All reviewers must be set up as Document Management operators in **Settings > Operators**.
- You must set up a MAPI-compliant, SMTP e-mail server in **Settings > E-mail**.

- You must set up an e-mail account for each recipient in **Settings > Operator Details**.
- Set up any operators you want to have override privileges in **Desktop > Tools > Security Administration > Role Setup**.



TIP: For more detailed information on setting up and using rules-based routing, see Help. In Document Management, click **Help > Index**, and type “routing.”

Set Up Routing Lists

You define the rules for automatically routing documents when you set up a routing list. Then you can select which routing list to use when you route a document from **Query**, **Scan** or **Inbox > Routing** tab.



NOTE: The **Document Routing** window will not display until you have completed the Document Management setup wizard.

- 1 Open **Document Management > Settings > Document Routing**.
- 2 Set up the **Routing list name**.

[New]—Create a new routing list. Click **[New]** and enter the routing list name, recipients, and other information.

[Delete]— Select a routing list name and click **[Delete]** to remove the routing list from Document Management.

[Copy]—Select a routing list name and click **[Copy]**. Enter a name for your new routing list. You may want to create several routing lists which contain only slight differences.

[Save]—Save the routing list you are working on. The routing list will now appear in the drop down list here and in **Inbox > Routing** tab.

- 3 Select a **Document type** from the list. The list pre-fills from **Settings > Document Types**.
- 4 Select a **Threshold** from the list.

Threshold types are based on the **Document Type** you selected. Only certain classifications associated with document types appear in the **Threshold** list.

The **Threshold** list displays items that are formatted as **Double** or **Integer** in **Settings > Classification Fields** and have been associated with a document type in **Settings > Document Type > Classify by**.

You can assign minimum and maximum thresholds to each recipient you set up in **Settings > Document Routing**. If a threshold amount falls outside the minimum or maximum, the recipient will not receive the document. For example, if Eric is allowed to approve invoice amounts up to \$50.00, he will not receive invoices for over \$50.00.

The use of thresholds is optional. If you do not wish to use thresholds to filter documents to recipients, leave the **Threshold Min** and **Threshold Max** boxes blank.

- 5 Select a **Type**.
 - **Sequential**—Reviewers receive documents in the order that you set up in the grid below. One reviewer must take action on a document before it is sent to the next reviewer.
 - **Parallel**—All reviewers can work on a document simultaneously.

- 6 Select whether recipients can forward documents to other DM Operators. An operator with override privileges can forward documents to another DM operator, even if you clear the **Allow recipient to forward** checkbox.
- 7 Selecting **Inactive** makes this routing list unavailable for selection during routing. You can re-activate a routing list at any time by clearing this check box.
- 8 Set up the recipient grid.

- ▣ **Recipient**—Select recipients for this routing list from the list. The list prefills with users that you set up as Document Management operators.

If you selected a sequential work flow, you can now set up the order in which recipients receive documents. Select a recipient and click the up or down arrow on the left to move the recipient's place in the grid.

- ▣ **Threshold Min and Threshold Max**—Enter the range that this recipient can approve. This is based on the **Threshold** you selected above. For example, if you select **Amount** as a **Threshold**, enter the minimum and maximum monetary amount this recipient can approve. The recipient will not receive notices for amounts smaller or larger than the minimum. **Threshold** is optional. If you do not want to filter documents by threshold, leave this box blank.
 - ▣ **Alternate Recipient**—Select an alternate recipient to approve the document in the recipient's absence. This list includes users you set up in Document Management operators.
- 9 Select a **Final owner** and **Alternate final owner** (optional)—The final owner receives a notice when all recipients have reviewed or approved the file. The alternate final owner will receive the notification in the final owner's absence. If no final owner is set up during the routing list setup, the sender becomes the final owner.



NOTE: The sender, rather than the final owner receives notification of documents which are rejected, terminated, overdue or expired. The sender is the person who originally routes a file.

- 10 Set due dates and expiration dates for this routing list. Due dates and expiration dates can be changed before a document is routed in the **Inbox**, **Scan**, or **Query > Routing** tab. After a document has been routed, only an operator with override privileges can change due dates.
 - ▣ **Document due in**—Enter the number of days to complete a document routing cycle. The system sends an overdue notice to the sender and to recipients who have not yet responded.
 - ▣ **Due date alert**—Enter the number of days before the due date to remind recipients. This number must be the same as or smaller than the Document due in number. The sender and any recipients who have not yet responded will receive a reminder that a document is coming due. Due date alert is optional. If you do not want to be alerted, leave the box blank.
 - ▣ **Document expires in**—Enter the number of days for a document to expire. For example, routing list "AP Invoices" has an expiration of 30 days. If an AP invoice remains uncompleted beyond that date, the workflow is terminated with a status of **Expired**. No notice is sent.
 - ▣ **Expiration date alert**—Enter the number of days before expiration to receive a reminder. This number must be the same as or smaller than the **Document expires in** number. If a routed document has not been approved, rejected, or terminated by the expiration alert date, the sender receives notification. Expiration date alert is optional. If you do not want to be alerted, leave the box blank.

- 11 Assign further conditions for this routing list in the **Advanced Filter Criteria** window. For example, you can set up various routing lists for a particular job using advanced filtering. When you set up routing lists such as agreements, AP invoices, etc., assign the job in this window.



TIPS:

- Name this routing list for the job (for example, 03-001 Agreement).
- If the job does not appear on the Classification tab, you can verify the job index for that particular document type in **Settings > Document Types**.

Create or Modify Routing List Criteria

- 1 Click a row or click the **Add Condition** link.
- 2 In the resulting boxes, enter or modify information.
- 3 Add additional conditions as necessary.
- 4 Remove conditions as necessary. To remove a condition, right-click and select **Remove this condition**.
- 5 Group conditions as necessary. For example, to see all leases for two properties, create conditions as follows:
 - ▣ and Lease is any
 - ▣ and (Property is Bel Isle
 - ▣ or Property is Glen Acres)

To group a condition, add or remove parentheses. Right-click the condition and select Add (, Remove (, Add), or Remove).



NOTE: A new condition appears beneath all other conditions. Therefore, Document Management evaluates the new condition last. To move a new condition higher in the evaluation order, you must delete conditions until the new condition is in the desired position. Then add the deleted conditions beneath the new condition.

Work with Rules-Based Routing

Begin a document routing cycle from the **Routing** tab, which is available from the **Query**, **Scan**, or **Inbox** windows.

Route a Document

- 1 Open **Scan**, **Inbox**, or **Query**. Select the document you want to route.
- 2 Open the **Routing** tab and select a **Document type**. This list prefills from document types you set up in **Settings > Document Types**.
- 3 Select a **Routing list**. The routing lists available in the **Routing list** are based on the **Document type** you selected and if advanced criteria are set, the classifications you selected. If no routing lists are associated with the document type, you can set them up in **Settings > Document Routing**.

Entries in the following fields are based on the rules you set up in **Settings > Document Routing**. You can change the entries before you first route a document. Once a document has been routed, only operators with override privileges can modify these entries.

- **Due**—Enter the date to complete a document routing cycle. The system sends an overdue notice to the sender and to recipients who have not yet responded.
- **Due alert**—Enter the date to receive a reminder. This date must be earlier than the **Document due in** date. The sender and any recipients who have not yet responded will receive a reminder that a document is coming due. **Due date alert** is optional. If you do not want to be alerted, clear the check box.
- **Expires in**—Enter the date for a document to expire. If a document has been routed but not reviewed beyond that date, the workflow is terminated with a status of **Expired**. No notice is sent.
- **Expiration alert**—Enter the date to receive a reminder. This date must be earlier than the **Document expires in** number. If a routed document has not been approved, rejected, or terminated by the expiration date, the sender receives notification. **Expiration date alert** is optional. If you do not want to be alerted, clear the check box.
- **Parallel or sequential** workflow—The workflow type can not be edited.
- **Recipient** grid—The sender can select to route this document to an alternate recipient. Rows are highlighted if the threshold value of the document falls outside the range of the recipient's minimum or maximum threshold. The document will not be routed to these recipients.
- **Final owner**—If no final owner was set up during the routing list setup, the sender becomes the final owner. The final owner receives notice when all recipients have reviewed or approved the file.
- **Alternate final owner**—Select an alternate final owner to receive notification in the final owner's absence.



NOTE: The sender, rather than the final owner receives notification of documents which are rejected, terminated, overdue, or expired.

- **Sender**—The person who originally routes a document.
- **Routing status**—The routing status is empty until the document has been routed. Other statuses include:
 - In progress**—The document has been routed.
 - Completed**—The document has been reviewed or approved by all recipients.
 - Terminated**—The document has been rejected or terminated.
 - Expired**—The document was not reviewed in the prescribed amount of time.
- **Document status**—The document status is empty until the document is routed. Other statuses include:
 - Routed**—The document has been routed. Also used when the workflow is terminated, and for expired documents.
 - Approved**—All recipients have reviewed and at least one has approved the document, with no rejections.
 - Reviewed**—All recipients have reviewed the document, with no approvals and no rejections.

Rejected—At least one recipient has rejected the document.

- 4 Click [**Route**] to send the document to recipients.

Take Action on a Document

When a document is routed, the system sends an email to recipients notifying them that an action is required on their part. The email contains a link to the document. They will also receive a copy of the document in their Document Management **Query, Scan or Inbox > Action Required** folder.

To take action and continue the routing process:

- 1 Open the document from the email link or from the **Action Required** folder.
- 2 Click the **Routing** tab.



NOTE: Unless you have override privileges, most of the items in this tab will be read-only.

- 3 After reviewing the document, select a response in **Action**. Depending on whether the routing list workflow is sequential or parallel, your response will have the following results:

Sequential workflow

- **Approve or Review**—If you are not the last recipient, then the next recipient will be notified by email, and the document will be routed to their **Inbox > Action required** folder.
If you are the last recipient, the document is stamped with "Approved" or "Reviewed." The final owner is notified, and the document is routed to their Document Management **Inbox > Action Required** folder.
- **Reject**—An email is sent to the sender, and the document is routed to the sender's Document Management **Inbox > Action Required** folder.
- **Forward**—The new recipient's name is added to the end of the sequence.

Parallel workflow

- **Approve or Review**—If you are the last recipient to respond, the document is stamped with "Approved" or "Reviewed." The final owner is notified, and the document is routed to their Document Management **Inbox > Action Required** folder.
- **Reject**—The sender is notified by email, and the document is routed to the sender's **Inbox > Action required** folder. Other recipients can still respond.
- **Forward**—The new recipient will be notified by email, and the document will be routed to their **Inbox**.

If you selected **Forward** in the **Action** box, you can now select who you want to forward this document to. You can forward the document to any Document Management operator, except those who are already in the recipient list and have yet to respond.

- 4 Add a comment up to 250 characters.



NOTE: You can edit your own comments until the routing process is completed. In the recipient grid, double-click the comment you want to edit. Make your edits in the **Edit Comments** window, then click [**OK**].

- 5 Click [**Submit**] to continue the routing process.

After all recipients have taken action on a document, it is stamped with "Approved" or "Reviewed." The final owner is notified per email, and the document is routed to their inbox.



NOTE: A document that has been stamped cannot be re-routed.

Set Up Batch Approval Emails

You can batch your approval emails. This enables you to receive one email that contains a collection of individual emails instead of receiving a series of individual emails. The batch email is sent periodically based on settings you specify.

You can set up your email batch preferences in **Batches DM > Settings > Operator Details > Routing E-mail Notification** by selecting **Scheduled In Batch** from the list.

You can then use the Windows **Task Scheduler** to schedule the notifications, as follows:

- 1 Open **Start > All Programs > Accessories > System Tools > Task Scheduler**.
- 2 In the **Actions** panel, open **Create Basic Task**.
- 3 Enter a name, such as John Smith's email schedule. Click **[Next]**.
- 4 Select how often you want to receive your batch of email. Click **[Next]**.
- 5 Enter the time of day you want to receive your batch of email. Click **[Next]**.
- 6 In **Action**, select **Start a program**. Click **[Next]**.
- 7 In **Program/script** browse to **[Drive] \Program Files\Timberline Office\Shared\SendSummaryRoutingNotifications.exe**.
- 8 In **Add arguments**, enter -a for everyone or enter the individual's email address. Click **[Next]**.
- 9 Click **[Finish]**.

Send Attachments to DocuVault

You can send attachments from select Sage Timberline Office Project Management tasks to DocuVault. In the task window, click **[Attachments] > File Links** tab.

You can send files to DocuVault from Accounting when:

- Compatible versions of Accounting and Document Management are installed.
- The task is integrated with DocuVault. (See the latest Release Notes for a list of tasks which have this capability.)

Beginning with the 9.8 version, there are no restrictions on the types of files you can attach. However, only the following file types can be *previewed* in Document Management.

- ASCII : *.txt
- Microsoft Excel : *.xls, *.xlsx
- Microsoft PowerPoint : *.ppt, *.pptx

- Microsoft Word : *.doc, *.docx
- PDF : *.pdf
- RTF : *.rtf
- Image types : *.jpeg, *.png, *.bmp, *.tif, *.tiff, *.jpg, *.gif

When you send a file to DocuVault from Accounting, it is indexed automatically so you can search for it in DocuVault at a later time. For example, when you create meeting minutes in Project Management, any attachments sent to DocuVault are indexed by the document type "Meeting Minutes Attachment" and the following data fields:

- Meeting Minutes Number
- Meeting Minutes Date
- Job

For more detailed information, click **[Help]** in the **File Links** window.

Chapter 6: Further Assistance

Online Help

Document Management includes online help, which provides answers to your questions about procedures as well as items in the windows.

To access the online help:

- In a window, click the Help button or icon, or press F1 to display the help topic for that window.
- In the Desktop, select **Help > Search for help on**, and then choose the desired module.

To aid you in finding the information you need, the online help for each module includes the following panes:

- **Contents** pane containing links to the help topics.
- **Index** pane containing keywords that link to help topics related to that keyword.
- **Search** pane, where you can type text and click [**Search**] to locate that text in the help topics.

For more information about using the online help, see the Sage Timberline Office Desktop help (in the Desktop, select **Help > Sage Timberline Office Desktop Help**).

We would like your feedback about the online help so we can make improvements. Each help topic contains an area where you can indicate whether the topic was helpful and provide additional comments. To protect your privacy, all comments are anonymous.

Depending on your Sage Service Plan, you may be able to take advantage of the following services:

Sage Customer Portal

You may log onto the Sage Customer Portal at

<https://customers.sagenorthamerica.com/irj/portal/anonymous/login> to access any of the following:

- **Knowledgebase:** Find answers to your questions, access downloads, and subscribe to your favorite articles. This service is available online 24/7.
- **Live Chat:** Chat online with a customer support analyst - a great option for quick questions. Chat hours are Monday through Friday from 6 a.m. to 3 p.m. Pacific Time, with the same exceptions as our telephone support (see below).
- **Online Support Request:** Submit an online support ticket when you have a non-urgent question. One of our call center support analysts will assist you. Online support hours are the same as our customer support call center hours (see below).

Sage Customer Support Call Center

Telephone Support: When you have a more urgent question or would prefer to speak to a customer support analyst directly, call us at 800-551-8307. Telephone support is available Monday through Friday from 6 a.m. to 5 p.m. Pacific Time with the following exceptions:

- Every Thursday from 2 p.m. to 3 p.m. Pacific Time (closed for customer support staff meetings)
- Standard United States holidays
- Quarterly company meetings

Training Information

Sage University offers online and classroom training sessions to help you get the most out of your Sage Timberline Office software. To access Sage University, from the Sage Timberline Office Desktop, visit www.sageu.com.

You can also get access to Sage University from the Sage Timberline Desktop from **Help > Sage Timberline Office on the Web > Sage Software University**.

Upgrading Your Service Plan

If your service plan does not provide online technical support and you would like to add or upgrade a service plan, please call 800-858-7098.