

Document Management Release Notes

Release 9.8

08/17/2011

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General Topics

Document Management 9.8 Available in a Download

As part of our ongoing efforts to “Go Green”, we will deliver our 9.8 release via software download only. In addition to being more environmentally conscientious, this approach also helps us get the release into your hands more quickly than traditional shipping methods. For more information, see [Knowledgebase article KB980](#).

Upgrade Information for Document Management

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

- Accounting and Management Products 9.8
- Estimating Products 9.8

New Activation Code Required

Due to major enhancements to the DocuVault and Document Management, a new activation code is required for installing 9.6.1 or later. Without the new activation code, you cannot complete the installation. You will have received an order confirmation for the upgrade which contains a new activation code number (also called activation key) for use with Document Management 9.6.1 or later.

DocuVault Compatible with Terminal Services

DocuVault is supported for installation on Terminal Services. For more information, consult the [Technical System Reference](#).

DocuVault Installation Destination Path Limitations

When you install DocuVault for the first time, the folder you enter as your **Destination Folder** will include the Document Management database. You may not want to accept the default DocuVault location, which is normally the C: drive that is typically partitioned for system files.

You can install DocuVault on the server or drive of your choice, given it has ample drive space. Consider the following as you determine your DocuVault location:

- You should install DocuVault on a server or drive that can accommodate future database growth. DocuVault installation is not dependant on a Sage Timberline

Office install. The DocuVault database grows at a faster rate than does your Sage Timberline Office data.

- You can 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, you can install DocuVault to a server that contains Estimating items databases.

Configuration Considerations for Document Management and Accounts Payable Integration

Document Management synchronizes only with Accounts Payable databases that are located on the server where Sage Timberline Office is installed.

Supported Operating Systems for Document Management

The following table lists operating systems that are supported for use with Document Management.

Operating System	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	
Windows 7 Enterprise		X	
Windows Server 2008 Small Business Server R2	SP2	X	X
Windows Server 2003 Enterprise Edition R2	SP2	X	X
Windows Server 2003 Standard Edition \$2	SP2	X	X
Windows Vista Business	SP2	X	
Windows Vista Ultimate	SP2	X	
Windows XP Professional	SP3	X	

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

Document Management is compatible with both 64 and 32-bit versions for all supported operating systems listed above. The DocuVault database can be installed on a 32 or 64-bit server-class operating system.

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.

System Requirements

Network Requirements:

- You must install Document Management on a client/server network with domain services.
- You cannot use Document Management on a peer-to-peer network or on a stand-alone computer.

The Document Management [Get Started](#) guide and [Technical System Reference](#) list additional system requirements.

Prerequisites not Found on DM Download

The following prerequisites are required, but not installed automatically from your Document Management or DocuVault Download:

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.

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

To verify that IIS is installed and active on the DocuVault server:

1. Open **Control Panel > Administrative Tools > Internet Information Services**.
2. Verify that **World Wide Web Publishing Service** is present and started.

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
Window XP	5.1
Windows Server 2003	6.0
Windows Server 2008	7.0
Windows Vista	7.0
Windows 7	7.5

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.

Note: 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.

Microsoft Office Programs

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" in the Document Management *Get Started* guide for more information.

Permissions

Document Management 9.6.1 should not need any special permission considerations after installation. However, if you have restricted permissions to various areas or shares, you may need to elevate the following to the local administrator group:

- 2003 Server and XP: ASPNET
- Vista and 2008 Server: Network Service

To add new groups to the administrator's group:

1. Open **Control Panel > Administrative Tools > Computer Management > Local Users and Groups > Groups**.
2. Right-click **Administrators** and select **Properties**.
3. Click [**Add**].

New Features

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, 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**].

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 certain file types can be *previewed* in Document Management. Files that can be previewed include:

- 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

Enhancements to the Installation

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

Fixes

Large scanned files can now be previewed

Previously, after scanning a large file and attempting to preview it, you would receive an error indicating the file was damaged and could not be repaired. The file now opens successfully.

Large TIFF files can now be previewed on a Windows 2003 server

Previously, on a Windows 2003 server, if you attempted to preview a large TIFF file that was scanned and sent to the inbox, the preview displayed a blank file. Now, the preview displays the file.

You are now warned if you do not have permissions to save changes to a document before sending

Previously, if you did not have permission to save changes to a document, you could make changes and then send the document to the inbox, and the document was sent without notification that the changes were not saved. Now, you receive a message that the changes are not saved prior to sending.

The recipient grid now refreshes correctly after changing classification when routing for Accounts Payable invoices

Previously, the recipient grid for Accounts Payable invoices did not refresh properly when the classification changed. For example, if recipients were unavailable to select on the routing list due to thresholds being set, and then invoices were selected that were below the thresholds, the grid did not update to indicate visually that the recipients could now be selected (even though they could). Now, the grid refreshes correctly.

Known Issues

Unable to Send to Inbox or Route from Scan

You may be unable to **Send to Inbox** or **Route documents from Scan** if you have the TCP/IP print server service enabled on your DocuVault server. Sending will occur normally if you disable the TCP/IP service.

To disable the TCP/IP print server service:

1. From the **Start** menu, select **Programs > Administrative Tools > Services**.
2. Double-click on **TCP/IPPrint Server**.
3. On the **General** tab, select **Disabled** from the **Startup type** list.

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.

Technical Assistance

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.