



# Sage Document Management

Version 15.1

User's Guide

**This version of the software  
has been retired**

Version 15.1

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# Introduction

## Supporting documentation

Along with this *User's Guide*, see the following documentation for additional information that will help you install and use version 15.1:

- The [Installation Checklist](#) contains a brief description of the steps involved in upgrading your software.
- The [Release Notes](#) provide details about new features, database changes, resolved issues, and known issues.

You can access a [complete library of supported product documents](#).

## About this guide

Use this guide to learn how to install the software as well as learn about using Document Management.

### Conventions used in this document

This document uses the following conventions:

- The names of windows, fields, and other features displayed by the software are **bold**.
- Text that you type into the windows is **bold**, as in the following example:  
Type **Miscellaneous** for **Amount Type**.
- Names of keys are shown in capitals; for example, **ENTER**, **TAB**. A plus sign (+) between two key names indicates that you should press both keys at the same time; for example, **SHIFT + TAB**.
- The names of buttons that you can click with your mouse are **bold** and enclosed in brackets; for example, **[OK]** and **[Post]**.



**TIP:** Helpful information to make your experience better.



**NOTE:** Information of particular interest, such as information not included in steps.



**CAUTION:** Information that can help you avoid a costly or time-consuming error.



**IMPORTANT:** Information that is of critical importance.

## Support and assistance

### Online help

Online help, which provides information about procedures as well as items in the windows.

To access the help in the software:

- In a window, click the [**Help**] button, click (the help icon button), or press **F1** to display the help topic for that window.
- In the Desktop, select **Help > Application Help**, and then choose the desired application.

To aid you in finding information, the online help for each application includes the following tabs:

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

### Training

Sage University offers live and recorded online training sessions to help you get the most out of your software. To access Sage University, either:

- From an application, select **Help > Web Resources > Sage University**.
- From Desktop, select **Tasks > Sage 300 Construction and Real Estate > Web Resources > Sage University**.
- From your browser, visit <http://www.sageu.com/>.

Contact your business partner for local training.

### Technical assistance

When you need assistance, refer to the [How do I get technical support for Sage 300 Construction and Real Estate?](#) article to determine which service works best for you.

# 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 300 Construction and Real Estate applications, you can select from Sage 300 Construction and Real Estate 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 time-saving queries. It is a powerful ally in a document-filled business world.



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



**CAUTION:** If you install DocuVault on a server with the Windows Server 2012 operating system (64 bit), DocuVault printer and native file functionality will only be available on Document Management client workstations with a 64-bit operating system.

## Installation notes

### Upgrade paths

See [“Upgrade paths” on page 9](#) for detailed information about the upgrade paths.

### Batches sent to DocuVault during Accounting installation

During an Accounting upgrade from version 9.8 or earlier to 12.1 or later, Accounts Payable invoice batches that are in the Document Management Scan queue will be locked. These batches are then automatically moved from the Scan queue to DocuVault during the installation of DocuVault 12.1 or later. If you want to send these batches to an Inbox prior to the upgrade, you must complete that action before installing Sage 300 Construction and Real Estate.

### Installing RAM on a computer with DocuVault

You cannot install more than 64G of RAM on a computer where DocuVault is installed.

### Avoid installing IIS on a domain controller

Document Management and DocuVault require that Internet Information Service (IIS) be installed and active on the DocuVault and Accounting servers if they are separate. See [“Internet Information Service \(IIS\)” on page 13](#) for more information.

For security and performance reasons, [Microsoft recommends that you avoid installing IIS on a domain controller](#). Domain controllers that include IIS, such as Windows Small Business Servers, may require custom configuration to work with DV and DM.

To avoid these issues, we recommend that you do not install DocuVault or Document Management on a Windows Small Business Server or domain controller.

### Installing to a Terminal Server

It is no longer necessary to use **Add/Remove Programs** to start an installation on a terminal server. You can now download and install programs on a terminal server using the instructions in the following pages.

# Chapter 2: Frequently Asked Questions

## Is Document Management 64-bit compliant?

Yes. Both Document Management and DocuVault are 64-bit compliant for all supported operating systems.

While the DocuVault database is 64-bit compliant, it does require the Internet Information Services application pool to function in 32-bit mode. For more information, see [“Internet Information Service \(IIS\)” on page 13](#). For assistance with configuring IIS, see your system administrator.

## Can I install DocuVault on a server with Windows Server 2008?

Yes. DocuVault is compatible with Windows Server 2008. For a complete list of supported operating systems, see the [System Requirements article in the Sage Knowledgebase](#).

## What rights do I need for Document Management and DocuVault?

To install Document Management and DocuVault, you must have administrator rights.

Unlike other Sage 300 Construction and Real Estate products, you can only open Document Management through the Sage Desktop. Therefore, you must have the same rights to Document Management that you have for Sage 300 Construction and Real Estate.

To use Document Management, you must have full control of specific files and folders on the local workstation. This is because you must be able to create or modify files in your **[Drive]:\Winnt** and **[Drive]:\Windows** system folders. For more information, see [“Assigning full-control user rights ” on page 45](#).

You do not need special rights to use DocuVault, because it runs as a service.

## Can I install DocuVault to a location other than the Sage 300 Construction and Real Estate server?

Yes, you can install **DocuVault** to a server with Windows Server 2008 or Windows Server 2012 that is different than the server that hosts Sage 300 Construction and Real Estate. However, you must install **Document Management** to the same server as other Sage 300 Construction and Real Estate products. If you install DocuVault to a separate server, Document Management will prompt you for the DocuVault server name during installation.

## Can I install DocuVault on a workgroup-only network?

No, we do not support a workgroup-only network configuration. DocuVault requires domain services or active directory services on the local area network.

### If Document Management stops responding during the workstation installation, how can I resolve this?

Try the following:

- Verify that you have full user rights to the parent folder of the application data folders containing files needed so that Timberline Office can run correctly. For Accounting and Management applications, the default location is **[Drive]:\ProgramData\Sage** on Windows Vista, Windows 7, and later operating systems.
- Turn off anti-virus software and unnecessary programs before you install.

### Which files and folders do I need access to in order to use Document Management?

To use Document Management, you must have full control of files and folders on the file server, terminal server, and workstations that have Document Management installed.

For a list of files and folders, see [“Assigning full-control user rights ” on page 45](#).

### What security rights do I need in order to set up Document Management operators?

To use **Settings** in Document Management, you must be a security administrator AND an application administrator for Sage 300 Construction and Real Estate.

In addition, you must be a **Privileged Operator** in Document Management to set up and manage Document Management operators.

See [“Chapter 6: Document Management Security,” on page 22](#) for detailed information.

### What determines the use of a DocuVault license?

DocuVault bases its licensing on the workstation name. For each workstation that is open, Document Management uses one license.

When you print to DocuVault from a Microsoft Office program, DocuVault uses an extra license until you close the Microsoft Office program.

See [“Change Document Management uses and registration” on page 25](#).

### What are the best batch settings when Optical Character Recognition (OCR) is enabled?

When you select the **OCR-Enabled** format (**DM > Scan > Batch Setting > General**), the recommended batch settings (**DM > Scan > Batch Setting > Scan**) are a **300 dpi** (dots per inch) resolution and a **BW (1-bit)** (black and white) or a **Grayscale (8-bit)** color.

### How do I troubleshoot problems that occur when I start Document Management?

Search the Sage Knowledgebase or chat with a Support representative.

### What file types can I send as attachments?

Any file type can be sent as an attachment from select Sage 300 Construction and Real Estate Project Management tasks.

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

### In the rules-based routing feature, can I batch my approval emails so I receive one email periodically instead of multiple 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.

For detailed instructions about rules-based routing, see [“Set up and work with rules-based routing,” on page 33](#)

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]**.

### **Is Document Management compatible with Microsoft Office 2010?**

As of the 9.8 release, Document Management is 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.

### **Can the DocuVault be used in a virtual environment?**

Yes. To use DocuVault in a virtual environment, you must employ a USB redirection program such as USB Anywhere. The redirection program enables the virtual computer to use the physical USB protection device. Sage does not provide customer support for USB redirection programs. Please contact program vendor with questions.

# Chapter 3: Before You Install

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.

### Domain controller

#### Avoid installing IIS on a domain controller

Document Management and DocuVault require that Internet Information Service (IIS) be installed and active on the DocuVault and Accounting servers if they are separate. See [“Internet Information Service \(IIS\)” on page 13](#) for more information.

For security and performance reasons, [Microsoft recommends that you avoid installing IIS on a domain controller](#). Domain controllers that include IIS, such as Windows Small Business Servers, may require custom configuration to work with DV and DM.

To avoid these issues, we recommend that you do not install DocuVault or Document Management on a Windows Small Business Server or domain controller.

## Compatible software

You must install one or more of the following programs before you install Document Management 15.1:

- Sage 300 Construction and Real Estate 15.1
- Sage Estimating 15.1

## Upgrade paths

If your Sage 300 Construction and Real Estate (Accounting) and Document Management products are on version 13.1 or 14.1, you can upgrade them directly to version 15.1. If your products are on version 12.1 or earlier, you must upgrade both products to 13.1 or 14.1 and upgrade your data before upgrading both products to version 15.1; refer to the following table.

Upgrade from	Upgrade path for Accounting with Document Management
14.1 or 13.1	<ol style="list-style-type: none"> <li>1 Install Accounting version 15.1.</li> <li>2 Install DocuVault and Document Management version 15.1, the native file print driver, and upgrade DocuVault.</li> </ol>
12.1 or 9.8	<ol style="list-style-type: none"> <li>1 Upgrade Accounting to either version 13.1 or 14.1.</li> <li>2 Upgrade DocuVault and Document Management to version 13.1 or 14.1 (to match Accounting).</li> <li>3 Upgrade your accounting data.</li> <li>4 If applicable, upgrade your Inventory, Purchasing, and Service Management data by opening those applications.</li> <li>5 Upgrade DocuVault data by opening the scan settings.</li> <li>6 Install Accounting version 15.1.</li> <li>7 Install DocuVault and Document Management version 15.1, upgrade the native file print driver, and upgrade DocuVault.</li> </ol>
9.7	<ol style="list-style-type: none"> <li>1 Upgrade Accounting to version 9.8.</li> <li>2 Upgrade DocuVault and Document Management to version 9.8.</li> <li>3 Upgrade Accounting to either version 13.1 or 14.1.</li> <li>4 Upgrade DocuVault and Document Management to version 13.1 or 14.1 (to match Accounting).</li> <li>5 Upgrade your accounting data.</li> <li>6 If applicable, upgrade your Inventory, Purchasing, and Service Management data by opening those applications.</li> <li>7 Upgrade DocuVault data by opening the scan settings.</li> <li>8 Install Accounting version 15.1.</li> <li>9 Install DocuVault and Document Management version 15.1, upgrade the native file print driver, and upgrade DocuVault.</li> </ol>

## System requirements

Refer to the [System Requirements article in the Sage Knowledgebase](#) for information about:

- Hardware requirements
- Supported operating systems
- Software requirements

## 32-bit and 64-bit operating systems

The DocuVault database can be installed on a 32-bit or 64-bit server-class operating system. While the DocuVault database is 64-bit compliant, it does require the Internet Information Services (IIS) application pool to function in 32-bit mode. For assistance with configuring IIS, see your system administrator and see [“Internet Information Service \(IIS\)” on page 13](#).

### **IMPORTANT:**

- When DocuVault is installed, it enables 32-bit applications on the SageAppPool for IIS. IIS 6.0 does not allow for the creation of separate application pools which use 32-bit and 64-bit simultaneously. 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.
- Avoid installing IIS on a domain controller. See [“Domain controller” on page 9](#) for more information.

Document Management is compatible with both 64-bit and 32-bit versions for all supported operating systems, with the exception of Window XP X64. For a complete list of supported operating systems, see the [System Requirements article in the Sage Knowledgebase](#) for information about:

 **IMPORTANT:** We no longer support the Microsoft Windows XP or Microsoft Server 2003 operating systems due to changes in Microsoft support for these old operating systems.

\* See the recommendation for the [“Domain controller” on page 9](#).

## Terminal Services

You can use Document Management and DocuVault with Terminal Services.

### Terminal Services configuration

We do not support the Remote Administration Mode of Terminal Services with Sage 300 Construction and Real Estate products, because it is a partially configured version of Terminal Services.

### Scanning in a Terminal Services environment

If you use Document Management in a Terminal Services environment, you need third-party scanner redirection software that is TWAIN-compliant and that allows Terminal Services access to scanners that are attached directly to remote computers. We do not test these products.

## Virtual environments

To use DocuVault in a virtual environment, you must employ a USB redirection program such as USB Anywhere. The redirection program enables the virtual computer to use the physical USB protection device. Sage does not provide customer support for USB redirection programs. Please contact the program vendor with questions.

## File system

Microsoft Windows NTFS file system is required on the computer where DocuVault is installed.



**NOTE:** Using Microsoft Windows NTFS file system to compress data or program files causes Document Management to run very slowly. We recommend you do not use the compression feature in NTFS for DM.

## Ports

Configure firewalls to allow communication to the following ports:

- 11486 -11488 (for DocuVault)
- 515 (for DocuVault printer)
- 80 (for IIS and DocuVault)
- 8101-8102 (for Sage Service Host)

## Mail servers

We test Document Management in a Microsoft Exchange Server environment. Document Management supports Simple Mail Transfer Protocol (SMTP) and Post Office Protocol (POP).

## Other requirements

- 17-inch monitor at 1024 x 768 resolution (recommended)
- 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](#))

## Prerequisite software



**NOTE:** You must install Sage 300 Construction and Real Estate or Sage Estimating before you install Document Management.

DocuVault installs the following third-party components automatically as needed during the installation on most operating systems.

Software	Notes
Microsoft Windows Installer 3.1	This is a required installation and configuration service.

Software	Notes
ASG DocuVault	This is the database that Document Management uses to store files.
.NET 3.5 and .NET 4	If .NET 4 is not present on your system, it is automatically installed except on the Windows 8.1 and Windows Server 2012 operating systems. For Windows 8.1, and Windows Server 2012, you must enable .NET 3.5 before installing DocuVault. For instructions, see <a href="http://cdn.na.sage.com/SageMail/install_dotNet_3-5.html">http://cdn.na.sage.com/SageMail/install_dotNet_3-5.html</a> .

The following prerequisites are required, but not installed automatically with Document Management or DocuVault:

- [Internet Information Service \(IIS\)](#)
- [Microsoft Office](#)

Make sure that they are installed and that IIS is enabled before installing DocuVault.

## Internet Information Service (IIS)

IIS must be installed and active on the DocuVault and Accounting servers if they are separate. IIS may be installed with a computer's operating system. Even though it is installed, it may be turned off. DocuVault will not install or upgrade on a computer unless IIS is present.

### Activating IIS

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

- 1 Open **Control Panel > Administrative Tools > Computer Management > 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. Install the version of IIS that is compatible with your operating system, as shown in the following table.

OS Version	IIS Version
Windows Vista	7.0
Windows Server 2008	7.0
Windows 7	7.5
Windows Server 2008 R2	7.5
Windows 8	8.0
Windows Server 2012	8.0

Microsoft ISA Server uses an Internet configuration script which prevents Document Management from accessing DocuVault through the IIS service. If you use the Microsoft ISA Server firewall client on your workstations, disable the use of configuration scripts in Internet Explorer as follows:

- 1 In Internet Explorer, open the **Tools > Internet Options > Connections** tab.
- 2 Click [**LAN Settings**].
- 3 Clear **Use automatic configuration scripts**.
- 4 Click [**OK**], and close Internet Explorer.
- 5 Close and reopen the Sage Desktop.



**IMPORTANT:**

- When DocuVault is installed, it enables 32-bit applications on the SageAppPool for IIS. IIS 6.0 does not allow for the creation of separate application pools which use 32-bit and 64-bit simultaneously. This is not an issue with IIS 7.0 and later.
- Do not install IIS on a domain controller. See [“Domain controller” on page 9](#) for more information.

## Microsoft Office

Install Microsoft Office 2003 or later on the DocuVault Server. If you want 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.

A workaround exists should you skip this step and subsequently want to open and work with MS Office files. See [“Work with native Microsoft Office files” on page 31](#) for more information.

# Chapter 4: Install to a Server

If you are installing for the first time, you will need to complete a few extra steps to set up your system. If you are upgrading, you can skip to [page 16](#).

## Installing for the first time

### DocuVault installation destination path

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.

### Other first-time considerations

- ▣ Read and understand [“Chapter 3: Before You Install.”](#)
- ▣ If you have Accounting and Management or Estimating products, install DocuVault to the server that contains Accounting or Estimating product databases.

Although not recommended, you can install DocuVault on a server that does not contain Sage 300 Construction and Real Estate. If you do, you must provide the server name during the installation of Document Management. IIS must be active on both servers. Learn more about IIS at [“Internet Information Service \(IIS\)” on page 13](#).

- ▣ 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 should install DocuVault on a server that can accommodate future database growth. The DocuVault database grows at a faster rate than does your Sage 300 Construction and Real Estate data.
- ▣ [Assign full-control user rights](#) to all folders that contain Document Management and DocuVault program files and data files.
- ▣ Install Microsoft Office 2003 or later on the DocuVault Server. If you want 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.

A time-consuming workaround exists should you skip this step and subsequently want to use Microsoft Office functions in your files. See [“Work with native Microsoft Office files” on page 31](#) for more information.

- ▣ Configure the firewall to allow Cypress port communication. See [“Ports” on page 12](#).  
If you receive a firewall warning message during the installation of DocuVault, work with your network administrator to allow the DocuVault to communicate through your firewall software. For example, if a **Microsoft Windows Firewall Security Alert** window appears, confirm with your network administrator that you wish to proceed. Then, select **Unblock this program** and click [OK].
- ▣ Activate Internet Information Service (IIS)—DocuVault requires IIS to be installed and active on the DocuVault server. To learn more about IIS, see [“Internet Information Service \(IIS\)” on page 13](#).

- ❑ Quit all programs and services for the duration of the installation. This includes programs that may be running in the background such as anti-virus, email, and backup programs.
- ❑ Do not remove the USB security key at any time before or during the installation.
- ❑ 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**.

## Upgrading Document Management



**IMPORTANT:** Document Management 15.1 includes changes to DocuVault indexes, which may take a long time to complete. We recommend that you plan the timing of your Accounting and Document Management upgrades so they will complete during non-work hours.

- ❑ Back up all Document Management data. For more information, see [“Backing up and restoring DocuVault” on page 40](#).
- ❑ Check your temporary folders and purge items from the following two locations:
  - X:\Windows\Temp
  - %Temp%

**NOTE:** In order to purge the %Temp% folder, either log into the server with the same user ID that the Cypress service is logging in as (since this is the location that the Cypress service is writing the temp DM files to) or locate the folder under the following path: **C:\Users\[user ID]\AppData\Local\Temp** (for the profile that the Cypress service is logging in as).

- ❑ Read the **Upgrade paths** section.(as well as other sections) of [“Chapter 3: Before You Install” on page 9](#).
- ❑ You must first install Sage 300 Construction and Real Estate 15.1 before you install Document Management 15.1.  
Performing the Sage 300 Construction and Real Estate 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**.

## Installing to a server

Use the following instructions for both initial installations and upgrades.

### Installing DocuVault

- 1 Attach the USB security key to a USB port on your server.
- 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 Follow the instructions you received in the 15.1 Document Management download notice.  
Open the **151\_Rev1\_DocumentManagement** folder and double-click **Install.exe** to begin the installation process.
- 4 In the installation window, click **Install DocuVault®**, and then follow the on-screen prompts.
- 5 At the end of this part of the installation, when the **InstallShield Wizard Completed** window appears, click **[Finish]**.
- 6 In the **Document Management Uses and Registration** window, enter your user name, enter your password, and click **[Apply]**. After validation is successful, click **[Next]**.
  - **User name**—The name you enter here becomes 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. For more information about changing the password, see [“Change Document Management uses and registration” on page 25](#).
- 7 Enter your **Registration name**, enter your **Activation code**, and then click **[Activate]**. After your software is activated successfully, click **[Close]**.
- 8 If you will not install Document Management on this server, install the DocuVault printer driver now. Skip to [“Setting up the DocuVault printer driver” on page 18](#) before installing Document Management.

## Installing Document Management

Install Document Management at the server that contains Accounting and Management or Estimating products.

- 1 Follow the instructions you received in the Document Management 15.1 download notice.  
Open the **151\_Rev1\_DocumentManagement** folder and double-click **Install.exe** to begin the installation process.
- 2 In the installation window, click **Install Document Management**. Follow the on-screen prompts to begin the installation.  
**NOTE:** If you installed DocuVault to a server that does not contain Accounting and Management or Estimating products, a **DocuVault Location** window appears. In this window, type the name of the server that contains DocuVault, and then click **[Next]**.
- 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, 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**.
    - b Double-click **Driver\_installer\_x86\_x64\_.exe** and follow the prompts.
- 4 At the end of this part of the installation, an **InstallShield Wizard Completed** window appears. Click **[Finish]**.
- 5 Install the DocuVault printer driver, as explained in the next section.

## Setting up the DocuVault printer driver

- 1 In the installation window, click **Install and set up DocuVault and native file 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]**.
- 5 Restart all programs and services that you shut down for the installation.

## Upgrading DocuVault indexes

Document Management 15.1 requires changes to DocuVault indexes, which may take a long time to complete.

- 1 In the installation window, click **Upgrade DocuVault**.

- 2 Follow the on-screen prompts to perform the upgrade.

# Chapter 5: Install to a Workstation

## Before you install

You must first install Sage 300 Construction and Real Estate before you install Document Management. Performing the Sage 300 Construction and Real Estate data upgrade before installing Document Management is optional. See the [“Upgrade paths” on page 9](#).



**NOTE:** The Accounting workstation installation no longer includes an option to perform a partial install to integrate with Estimating. Full Accounting installations are 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 [Sage 300 Construction and Real Estate User's Guide](#).

If you are upgrading, back up all Sage 300 Construction and Real Estate application and data files.

Quit all programs and services for the duration of the installation. This includes Sage 300 Construction and Real Estate and programs that may be running in the background, such as antivirus, email, and backup programs.

## Installing to a workstation

At a workstation that has Accounting and Management or 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.

### Installing 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 location on the server where you installed Accounting and Management products. For example, browse to **[Drive:] \9.5\Accounting\WININST\dmClient\Install.exe**.

**5** Double-click **Install.exe** and follow the on-screen prompts.

### Installing to a Terminal Server

Depending on how you are using your terminal server, follow the instructions for installing to a server on [page 15](#) and installing to a workstation on [page 20](#).

## Setting up the DocuVault printer driver

- 1 In the installation window, click **Install and set up DocuVault and native file printer driver**, and then click [**Start**].
- 2 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**].
- 3 A **DocuVault Printer Driver Setup** window appears that says **You have successfully installed the DocuVault printer driver**. Click [**Finish**].
- 4 After you finish the installation, be sure to log off of the workstation and then log back on.

## Final installation steps

- 1 On this workstation, restart all programs and services that you shut down for the installation.
- 2 Repeat the installation procedure on each workstation.
- 3 Complete the security setup if necessary before you begin to use Document Management. See [“Chapter 6: Document Management Security” on page 22](#) for instructions.

# Chapter 6: Document Management Security

Read the following topics on security considerations, then follow the steps in [“Document Management security” on page 23](#) to set up security. You must configure security between Sage 300 Construction and Real Estate and Document Management only once. If you have already completed the security set-up, you can skip to [“Chapter 7: Use Document Management” on page 27](#).

## Upgrade Path

You must upgrade to Document Management 9.8 or 12.1 in order to install 15.1. See [“Upgrade paths” on page 9](#) for more information.

## Set up security in Sage 300 Construction and Real Estate

You must enable Sage 300 Construction and Real Estate Security in order to use Document Management (DM). If you do not use security with Document Management, you can temporarily enable Sage 300 Construction and Real Estate security to set up Document Management, and then disable it.

Sage 300 Construction and Real Estate Security Administration is available from Desktop. It includes two roles: a Security Administrator and an Application Administrator. The person who sets up Document Management must be both in order to configure DM users and settings in DM.

When you set up Sage 300 Construction and Real Estate Security Administration, you must assign the DM privileged operator who is responsible for configuring DM users and settings to both roles.

## More resources

- Read the chapter on security in the [Sage 300 Construction and Real Estate User's Guide](#).
- 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.
- To learn more about Sage 300 Construction and Real Estate 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.

## Document Management security

If you have not already configured security, there are two setup paths to take:

- If you are upgrading from 9.4 or earlier, you must install 9.8 or 12.1 before installing 15.1. Complete the security wizard after installing 9.8. The security wizard guides you through the process of mapping existing DM operators to Sage 300 Construction and Real Estate users. DM contains a wizard ( **Tasks > Setup Security**) that walks you through the process of setting up this one-time mapping. You can then manage DM operators and configure DM security in Document Management.
- If you do *not* already use Sage 300 Construction and Real Estate Security Administration, for example you own Accounting, and just purchased Document Management:
  - a Create a corresponding user account in Sage 300 Construction and Real Estate Security Administration for each DM user before you can configure DM. See the chapter on security in the [Sage 300 Construction and Real Estate User's Guide](#) for instructions on creating Security Administration users accounts.
  - b After setting up the user accounts in Security Administration, you must then map the new Sage 300 Construction and Real Estate users to your DM operators.

After Sage 300 Construction and Real Estate users have been mapped to DM operators, you can then manage DM operators and configure DM security as normal in DM.

### Setting up Document Management security

- 1 Click **[Start] > Programs > Sage > Sage 300 Construction and Real Estate > Desktop**.
- 2 In the **Tasks** pane, open the **Sage 300 Construction and Real Estate > Document Management > Setup Wizard** task.

**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 [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 300 Construction and Real Estate 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 300 Construction and Real Estate 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 300 Construction and Real Estate 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.

- 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.

- 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.

## Assigning operator and privileged operator rights

Operators have restricted rights in Document Management. For example, operators only have access to the queues and documents specified in **Settings (Tasks > Document Management > Settings)**.

Privileged operators have unlimited rights. For example, privileged operators have access to all queues, all inboxes, all queried documents, the **Settings** task, and the permanent delete feature. You must have at least one privileged operator.

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.

## Change Document Management uses and registration

DocuVault bases its licensing on the workstation name. For each workstation that is open, Document Management uses one license.

When you print to DocuVault from a Microsoft Office program, DocuVault uses an extra license until you close the Microsoft Office program.



**CAUTION:** Do not remove the USB security key before or during this process.

- 1 At the DocuVault server, select **[Start] > All Programs > Sage > Sage 300 Construction and Real Estate > Reporting and Other Tools > Document Management > Change Uses and Registration**.
- 2 A **Document Management Uses and Registration** window appears next. Enter your **Registration name** and **Activation code**.
- 3 On the **Set up DocuVault administrator** tab, enter:  
**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. If your system requires a periodic password change, you must update this password manually; see [“Change the Administrator password”](#) (the next section).
- 4 Right-click **Cypress**, and select **Restart**.
- 5 A **Document Management Uses and Registration** window appears that says **You have successfully activated Document Management**. Click **[Finish]**.

## Change the Administrator password

The password you enter in **Change Uses and Registration** 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:

- 1 Log on to the DocuVault server.
- 2 From the **Start** menu, open **Programs > Sage > Sage 300 Construction and Real Estate > Reporting and Other Tools > Document Management > Change Uses and Registration**.
- 3 Enter the new system password.

To manually change the credentials and restart the Cypress service:

- 1 From the **Start** menu, open **Control Panel > Administrative Tools > Services**.
- 2 Right-click on **Cypress** and select **Properties > Logon**.
- 3 Select **This account**, and enter the user name and password.
- 4 Close the **Properties** window.

# Chapter 7: Use Document Management

The instructions in this chapter will help you become familiar with the features and workflows in Document Management. To ensure that your system continues to operate properly after installation, see [“Chapter 8: System Guidance and Maintenance”](#).



## NOTES:

- Document Management tasks (**Inbox**, **Scan**, and **Queries**) may not appear if you log on to Windows and Sage 300 Construction and Real Estate 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 300 Construction and Real Estate 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). Ensure that IIS is configured correctly to enable IIS to control the password. See [“Internet Information Service \(IIS\)” on page 13](#).

## 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. If you do not enter a title, the system will use the default title for this document. Once you click [**Finish**], the document is saved into the DocuVault, and you cannot change the 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

### Batch settings with Optical Character Recognition (OCR)

When you select the **OCR-Enabled** format (**DM > Scan > Batch Setting > General**), the recommended batch settings (**DM > Scan > Batch Setting > Scan**) are a **300 dpi** (dots per inch) resolution and a **BW (1-bit)** (black and white) or a **Grayscale (8-bit)** color.

- 1 From the **Tasks** pane, open the **Sage 300 Construction and Real Estate > 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.

## Destroy DocuVault documents

If you have privileged operator rights in Document Management (**Settings > Privileged Operators**), you can destroy DocuVault documents. That is, you can permanently delete documents from DocuVault. From the **Query Results** window, click **[X]** on the DocuVault toolbar to destroy the documents that you have selected.



**NOTE:** You cannot destroy AP invoice documents. First, you must unlink the AP invoice document. Then, you can destroy the unlinked document.

## Locate the Document History Log

Document Management logs the details of any document that is deleted from DocuVault. In addition, it logs the details of an AP Invoice document that is disassociated from an Account Payable invoice. The log is located at **[Drive]:\Documents and Settings\All Users\Application Data\Sage\DocumentManagement\Version x.x\DMServer\LogFiles\ServerLog.xml**.

## 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 window

- 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.

## Burn documents to CD or DVD

This feature is available only from the **Query Results** window in Document Management.



**NOTE:** You must burn entire documents. In the **Query Results** window, if you select individual pages within a multi-page document, Document Management still burns the entire document.

To burn a document to CD or DVD:

- 1 Insert a blank CD-R, CD-RW, or DVD±R into your CD or DVD drive.
- 2 From the **Query Results** window, in the tree view, select the check boxes of one or more documents.
- 3 Right-click anywhere in the tree view; then select **Burn CD/DVD**.
- 4 From the **Burn CD/DVD** window, in the **Drive Name** box, select a drive.
- 5 In the **Volume Label** box, type a volume label.
- 6 Click [**Burn**]. Document Management burns the document in PDF format.

## Work with native Microsoft Office files

### Installing Microsoft Office after installing 9.6.1 or later

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

- 1 Delete the MS Office 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 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** check box.

**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 cannot 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 300 Construction and Real Estate 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 8: System Guidance and Maintenance

This chapter provides additional information to help you maintain and use Document Management and the DocuVault.

## Backing up and restoring DocuVault

You should back up the DocuVault database and selected program files every day.

We strongly recommend that you use third-party software to back up the entire DocuVault database and selected Document Management program files to external media. Do not perform incremental backups. Incremental backups will not work due to the nature of the DocuVault database.

We strongly recommend routinely validating the state of your DocuVault using the validate command.



**NOTE:** For information about backing up Sage 300 Construction and Real Estate, see the [Sage 300 Construction and Real Estate User's Guide](#).

Consider the following requirements as you develop your backup plan:

- Choose between a manual or automated backup process. For more information about manual and automated backup processes, see [“Backing up and restoring DocuVault” on page 40](#).
- Schedule backups during non-business hours. Before backing up, all uses of Document Management must be closed. Any backup that you make while DocuVault is running is unusable.
- Third-party backup software that uses snapshots of the server are not supported, unless proper backup procedures outlined in this section are followed.
- Verify that your backup software supports the wildcard character (\*).
- Verify that when a folder is included in a backup, the backup software also includes the subfolders. In other words, the backup software should support recursive backups.
- When performing a backup, you must also stop the hub service and put it in offline dump mode.
- Always backup the entire DocuVault, including all data files, log files, and the control file. Do not perform incremental backups.
- Review the locations of application data and back up all data, even if it is outside the default folders. The default folder paths and files:
  - **[Drive]:\TSDV\**
  - On Vista, Windows 2008, and Windows 7: **[Drive:]Program Data\Sage**
- Run all pre-backup, backup, and post-backup commands at the server. If your backup software runs on a separate server, you may install a backup agent on the server. (For more information about pre-backup, backup, and post-backup commands, see [“Automated backup” on page 42](#).)
- For an automated backup, verify that the pre-backup, backup, and post-backup commands do not produce errors.

- Store backup media in a secure location outside your building.
- Test backups by restoring them to test folders. These tests are important because backup media may have a limited life, backup devices may malfunction, and you may have incorrect software settings in your backup software.



**CAUTION:** When you test a backup, keep the restored data separate from your production data.

## Manual backup



**CAUTION:** Before you perform a manual backup, you must execute the **Prepare for Offline Backup** command, as described in step 4. Any backup that you make without first executing this command is unusable.

- 1 Ask everyone to close Document Management.
- 2 At the server that contains DocuVault, open the file **[Drive]:\TSDV\Server\DocuVaultMaintain.exe**.
- 3 In the **DocuVault Maintenance** window, click the **Backup** tab.
- 4 Select **Prepare for Offline Backup**; then click **[Execute Command]**.
- 5 When the command finishes, the lower right area of the **DocuVault Maintenance** window displays **Ready for offline backup**.
- 6 With third-party backup software, create a new backup job. In the job name, indicate that this is a full DocuVault backup.
- 7 Back up the following:
  - **[Drive]:\TSDV\**
  - **[Drive]:\Documents and Settings\All Users\Application Data\Sage\**
  - For Windows Server 2008: **[Drive]:\ProgramData\Sage\**
- 8 After the backup finishes, return to the **DocuVault Maintenance** window.
- 9 Select **Resume from Offline Backup**; then click **[Execute Command]**.

When the command finishes, a **db\_prog.exe** window that says **DocuVault READY** may be in front of the **DocuVault Maintenance** window. If this is the case, close or minimize the **db\_prog.exe** window. The **DocuVault Maintenance** window displays **DocuVault is back online** in the lower right corner.
- 10 Click **[Close]**.

## Automated backup



**CAUTION:** Before you perform a backup, stop the hub service and put the hub service in offline dump mode, as described in steps 3 and 4. Any backup that you make while DocuVault is running is unusable.



**NOTE:** The pre-backup, backup, and post-backup commands (steps 3, 4, 6, 7, and 8) must execute on the server. If your backup software runs on a separate server, you may install a backup agent on the server.

- 1 If you are performing the backup at a time when operators might be using Document Management, ask everyone to close Document Management.
- 2 With third-party backup software, create a new backup job. In the job name, indicate that the job is a full DocuVault backup.
- 3 Add the following pre-backup command to your backup script:  
**net stop cypress**  
This command stops the hub service, which makes DocuVault inaccessible to all users.
- 4 Add the following pre-backup command to the next line of your backup script:  
**[Drive]:\TSDV\Server\db\_prog.exe -start\_offline\_dump**  
This command moves all log files to the **TSDV\Server\db\_prog.exe\_collateral** directory. In addition, it ensures that no transaction data writes to DocuVault during the backup.
- 5 Verify that the pre-backup commands do not produce errors. Given the critical role of backup files, you must verify that the return code (ERRORLEVEL) for all db\_prog commands is zero. For example, if your backup software uses batch files for its pre-backup and post-backup steps, the pre-backup step might look like this:  
**net stop cypress**  
**c:\TSDV\Server\db\_prog.exe -start\_offline\_dump**  
**if not ERRORLEVEL 0 goto mark\_dump\_failed...**  
**:mark\_dump\_failed**  
**rem do whatever is needed to log a failure**
- 6 In the backup software, type the directory paths and files that you want to backup:
  - **[Drive]:\TSDV\**
  - **[Drive]:\Documents and Settings\All Users\Application Data\Sage\**
  - For Windows Server 2008: **[Drive]:\ProgramData\Sage\.**

**NOTE:** Verify that your backup software supports the wildcard character (\*). You must backup all files and folders underneath the designated folders.
- 7 Add the following post-backup command to your backup script: **[Drive]:\TSDV\Server\db\_prog.exe -cancel\_offline\_dump**  
This closes the DocuVault backup and makes DocuVault ready for use.
- 8 Add the following post-backup command to the next line of your backup script: **net start cypress**  
This step starts the DocuVault service.

- 9 As with the pre-backup commands, verify that the return codes for each command are zero.
- 10 Perform any other steps to complete the job definition, (for example, define a backup schedule).
- 11 Save the backup job.

## Restore a backup



**CAUTION:** Before you restore a backup, you must execute the **Prepare for Offline Backup** command, as described in step 4. Any restore that you make without first executing this command is unusable.

- 1 Ask everyone to close Document Management.
- 2 At the server that contains DocuVault, open the file **[Drive]:\TSDV\Server\DocuVaultMaintain.exe**.
- 3 In the **DocuVault Maintenance** window, click the **Backup** tab.
- 4 Select **Prepare for Offline Backup**; then click **[Execute Command]**.

When the command finishes, the lower right area of the **DocuVault Maintenance** window displays **Ready for offline backup**.

- 5 As a precaution, change the name of a file and several folders on your hard drive.  
For example, add “\_temp” to the following file and folder names:

- **[Drive]:\TSDV\**
- **[Drive]:\Documents and Settings\All Users\Application Data\Sage\**
- For Windows Server 2008: **[Drive]:\ProgramData\Sage\**

- 6 Navigate to the location of the backup that you want to restore.
- 7 Restore backed up folders and files.
- 8 Return to the **DocuVault Maintenance** window.
- 9 Select **Resume from Offline Backup**; then click **[Execute Command]**.  
When the command finishes, a **db\_prog.exe** window that says **DocuVault READY** may be in front of the DocuVault Maintenance window. If this is the case, close or minimize the **db\_prog.exe** window.  
The **DocuVault Maintenance** window displays **DocuVault is back online** in the lower right corner.
- 10 Click **[Close]**.
- 11 Verify that your restored data is acceptable.
- 12 If your restored data is acceptable, delete the file and folders that you renamed in [step 5](#).

## Validating DocuVault integrity

The DocuVault scan utility enables you to validate the data records and key fields within DocuVault. We recommend that you run this utility periodically as part of the backup cycle to identify problems as soon as they occur.

### A. Stop the DocuVault hub

To see **Start Hub** and **Stop Hub** from the **Document Management** menu, you must log on to the server as the user who installed Document Management.

- 1 At the DocuVault server, select **[Start] > All Programs > Sage > Sage 300 Construction and Real Estate > Reporting and Other Tools > Document Management**.

**NOTE:** For operating systems such as Windows Server 2008 that use UAC (User Account Control), this option must be run as an administrator. To do this, right-click the menu item and select **Run as administrator**.

- 2 Double-click **Stop Hub**.
- 3 When the “The Cypress service was stopped successfully” message appears, close the **Stop Hub** window.

### B. Scan and validate DocuVault

- 1 Click **Start > Run** or click **Start** and type "run".

**NOTE:** For operating systems such as Windows Server 2008 that use UAC (User Account Control), this option must be run as an administrator. To do this, right-click the menu item and select **Run as administrator**.

- 2 Type: **[Drive]:\TSDV\server\db\_prog -scan\_dv**.

If the validation indicates there is corruption, contact Customer Support.

### C. Start the DocuVault hub

- 1 At the DocuVault server, select **[Start] > All Programs > Sage > Sage 300 Construction and Real Estate > Reporting and Other Tools > Document Management**.

**NOTE:** For operating systems such as Windows Server 2008 that use UAC (User Account Control), this option must be run as an administrator. To do this, right-click the menu item and select **Run as administrator**.

- 2 Double-click **Start Hub**.
- 3 When the “DocuVault READY” message appears, close the **db\_prog.exe** and **Start Hub** windows.

## Do not actively scan for viruses



**CAUTION:** If you actively scan Sage 300 Construction and Real Estate program files and data files for viruses while the program is in use, you may cause Document Management to run slowly or to close unexpectedly. Scan these files at a time when they are not in use. For example, schedule a daily scan during non-business hours.

Typical folders that contain files that you should not scan include:

- Sage 300 Construction and Real Estate program files: **[Drive]:\Program Files\Timberline Office**
- DocuVault program files: **[Drive]:\TSDV\server**
- Sage 300 Construction and Real Estate data files: **[Drive:]\[datafoldername]**
- Document Management data files: **[Drive]:\Documents and Settings\All Users\Application Data\Sage\**

## Obtaining full-control user rights

To use Document Management, you must have full control of specific files and folders on the local workstation. This is because you must be able to create or modify files in your **[Drive]:\Winnt** and **[Drive]:\Windows** system folders.

## Assigning full-control user rights

To use Document Management, users must have full control of all folders that contain Document Management and DocuVault program files and data files. This is because you must be able to create or modify files in your **[Drive]:\Winnt** and **[Drive]:\Windows** system folders. Typically, these include the following files and folders on the file server, terminal server, and workstations:



**CAUTION:** Incorrectly modifying Microsoft Windows security may severely affect your system operations. Sage is not responsible for operation problems caused by incorrectly modifying your Microsoft Windows security settings. To set permissions on your network or Windows operating system, you must have advanced knowledge of your network. Contact your system administrator for assistance.

- **On 64-bit operating systems: [Drive]:\Program Files (x86)\Timberline Office folder:** This folder is located on the file server, terminal server, and workstations where you installed Sage 300 Construction and Real Estate. It is the default installation location for Sage 300 Construction and Real Estate. However, depending on your system configuration, your company may have renamed this folder or installed it to a different location.
- **Company data folder:** The data folder is located on the file server where you installed Sage 300 Construction and Real Estate.

### Windows Vista, Windows 7, Windows Server 2008

- **[Drive]:\Users\[username] folder:** This folder is located on the workstation or terminal server where you use Sage 300 Construction and Real Estate. Sage 300 Construction and Real Estate installs necessary files to this folder and requires that the user has full control of it. Typically, the user has full control of this folder by default.
- **[Drive]:\ProgramData\Sage folder:** This folder is located on the workstation or terminal server where you use Sage 300 Construction and Real Estate Accounting and Management programs. This folder must be shared on the server. Sage 300 Construction and Real Estate installs necessary files to this folder and requires that all users have read/write permissions to this folder and all of its subfolders. This folder may be hidden by default.



**TIP:** To view hidden folders, open Windows Explorer, select **Tools > Folder Options**, and select the **View hidden files and folders** check box on the **View** tab.

### Complying with Windows User Account Control (UAC) requirements

Sage 300 Construction and Real Estate is designed to work with the Windows User Account Control (UAC) security scheme. Many Sage 300 Construction and Real Estate folders are stored in a shared location. To ensure Sage 300 Construction and Real Estate applications work correctly, you must ensure you have read/write permissions to these files.

If you are upgrading Document Management, you do not need to move your files. Ensure you have read/write permissions assigned to your Document Management and DocuVault folders.

You cannot save a file to a folder to which you do not have read/write permissions assigned. If such an attempt is made, Sage 300 Construction and Real Estate applications present you with an error message if you try to save a file to a non-compliant location.

## Printers

### DocuVault printer

After you install DocuVault and Document Management on the server, set up the DocuVault printer driver. You use the DocuVault printer to send documents to DocuVault and to inboxes in Document Management. See [“Setting up the DocuVault printer driver” on page 18](#) for detailed instructions about installing the printer driver.

### Windows printers

You can print documents to a local printer or network printer from the **Inbox** window or **Query Results** window in Document Management. When printing from the **Inbox** window, most printer settings are unavailable. When printing from the **Query Results** window, you can select additional printer settings.

## Scanners

### Use TWAIN-compliant scanners with Document Management

Sage supports TWAIN-compliant scanners for use with Document Management.

In multi-function scanner/printers, the scanner function works correctly with Document Management if the scanner is TWAIN-compliant. However, we do not test the printer function of multi-function scanner/printers. The printer function may not work correctly with Sage 300 Construction and Real Estate.

### Scan in a Terminal Services environment

If you use Document Management in a Terminal Services environment, you need third-party scanner redirection software. This software must be TWAIN-compliant and must allow Terminal Services direct access to scanners that are attached directly to remote computers. We do not test these products.

## Managing disk space

### Decrease document size

The amount of disk space that Document Management uses depends on the resolution and color values that you select in the batch settings and scanner settings.

Keep resolution settings and color settings at appropriate values to manage disk usage effectively. For example, do not use color settings to scan black and white documents. Keep resolution values at the default of 300 dots per inch (dpi), unless you require an increased resolution.

### Calculate current disk space requirements

We recommend that you check your current Document Management storage requirements monthly at your DocuVault server to ensure that you have adequate disk space.

To view the size of your DocuVault database:

- 4 Browse to your DocuVault database folder. (The default location is **[Drive]:\TSDV\Server\db\_prog.exe\_collateral**.)
- 5 Right-click **db\_prog.exe\_collateral** and select **Properties**.
- 6 From the **General** tab, note the **Size** of the folder.
- 7 Compare the size of the folder to the size of your drive.

### Calculate future disk space requirements

The Storage Information utility enables you to calculate the current disk space used by DocuVault to predict the future disk space requirements. Use it to identify when you may need additional disk space.

To run the Storage Information utility:

- 1 At the DocuVault server, select **[Start] > All Programs > Accessories > Command Prompt**.

**NOTE:** We recommend running the Storage Information utility from the DocuVault server for faster performance. However, when working with a small DocuVault, you may run the utility from a network-connected workstation.

- 2 Type **chdir [Drive]:\TSDV\Server** to change the drive and path to your DocuVault server.

- 3 Type the command in this format:

**storage\_prog [number of days] [DocuVault@servername] [Drive:\path\filename.csv]**

- **storage\_prog:** This command starts the Storage Information utility.
- **[number of days]:** Type the number of days you want to analyze. The more days you specify, the longer it will take to complete the report.
- **[DocuVault@servername]:** Type **Docuvault@** followed by the name of the server. This parameter is case sensitive. If the server name contains spaces, you must enclose the parameter in quotation marks.
- **[Drive:\path\filename.csv]:** If you want to save the storage report as a spreadsheet, type the path and file name followed by **.csv**. If you want to view the report in the **Command Prompt** window, skip this step.

For example, if you want to create a storage report forecasting the next 30 days of activity based on the last 30 days and if you want to save the report, you would type a command similar to this:

**storage\_prog 30 DocuVault@ABC1234567Z C:\storage\_usage.csv**

- 4 If you saved the report to a spreadsheet, browse to the file name you specified in step 3, bullet 4, and open the report.

### Decrease document size with scanner settings

The amount of disk space that Document Management uses depends on the resolution and color values that you select in the batch settings and scanner settings.

Keep resolution settings and color settings at appropriate values to manage disk usage effectively. For example, do not use color settings to scan black and white documents. Keep resolution values at the default of 300 dots per inch (dpi), unless you require an increased resolution.

## Moving DocuVault to a new server



**CAUTION:** Incorrectly moving DocuVault may severely damage your system. Sage is not responsible for damage to your data caused by incorrectly moving DocuVault. Before making changes to DocuVault, contact your system administrator for assistance and make a backup copy of all valued data.

1 Follow steps 1 through 8 for [“Manual backup” on page 41](#).

2 Install DocuVault at the new server with your download link. See [“Installing to a server” on page 17](#).

**NOTE:** You must have a valid USB security key to install DocuVault to your new server. Following the installation instructions below, remove the USB key from your old DocuVault server and use it to install DocuVault on the new server.

3 Restore the backup of your DocuVault to the new server. Follow the steps to [“Restore a backup” on page 43](#).

4 If you installed DocuVault to a path that differs from the path for the previous installation, follow these steps:

**a** At the new DocuVault server, select **[Start] > All Programs > Command Prompt**.

**b** Type **chdir [Drive]:\TSDV\Server** to change the drive and path to your new DocuVault server.

**c** Type the command in this format:

```
db_prog -update [Drive:\path]\TSDV\Logs * * *
```

The asterisks are for items that are not changing (the log file size, the DocuVault cache, and the log file disposition).

For example, if you previously installed DocuVault to C:\TSDV on your old server and you installed DocuVault to D:\Sage\TSDV on your new server, you would type this command from D:\Sage\TSDV\Server:

```
db_prog -update D:\Sage\TSDV\Logs * * *
```

5 Reactivate your USB security key. For reactivation instructions, see the Technical Support Knowledgebase article titled “I Moved Document Management and I Need to Reactivate My USB Key.”

6 Update each workstation and other servers which integrate with DocuVault; for example, the Accounting Server.

▫ For Windows Vista, Window 7, and Windows Server 2008—Go to **\ProgramData\Sage\DocumentManagement\Version x.x\DMClient**.

▫ Open **DMServerName.xml** and replace the existing **ServerName** attribute with the new server name.