Installation Checklist for Sage Timberline Office
Accounting & Management Products 9.8,
Estimating Products 9.8, and Document Management 9.8

Step	Upgrade Instructions	Done
1	Read the *Important* document, *Release Notes* and the *Installation Guide* for important information regarding this upgrade, including new requirements and detailed installation instructions.	☐
2	Create a complete backup of all Sage Timberline Office data and program files.	☐
3	Make sure that you install the appropriate operating system service pack level, and that your server and workstations meet all other hardware and software requirements before you install Sage Timberline Office products	☐
4	Ensure that there is sufficient hard disk space available. For example, Accounting and Management Products require up to 2 gigabytes of available hard disk space. See "System Requirements" in the *Installation Guide* for more information.	☐
5	Make sure that you have full control of the necessary folders, files, and registry keys on your file server, terminal server, and workstations that will have Sage Timberline Office installed. For a list of the required folders, files, and registry keys for your operating system, see "Required Privilege Settings" in the *Installation Guide*.	☐
6	Quit all programs and services for the duration of the installation. This includes programs that may be running in the background, such as antivirus, email, and backup programs.	☐
7	If you are running Windows Vista, Windows 7, or Windows Server 2008, elevate your permissions. See "Before You Install" in the *Installation Guide* for more information.	☐
8	To ensure security settings are applied to all instances of the same report or inquiry within an application, rename each instance so it has a unique report or inquiry name. See "Before You Install" in the *Installation Guide* for more information.	☐
9	If you are upgrading from 9.4.x, have already been using security in Sage Timberline Office, and use Document Management, delete inactive Document Management users before upgrading to 9.8.	☐
10	If you use Accounting, install Accounting and Management Products 9.8 on the server. Be aware that the installation process may restart your server several times.	☐
11	If you installed Accounting, restart the server, and log in as the same user that installed the software. Open the software and wait until the configuration process is completed.	☐

This version of the software has been retired

12	If you installed Accounting, show hidden files and folders. On Windows XP Professional or Windows Server 2003, open Windows Explorer, select **Tools > Folder Options**, and select **View hidden files and folders** on the **View** tab. On Windows Vista, Windows 7, or Windows Server 2008, select **Organize > Folder and Search Options**, and then select **Show hidden files and folders** on the **View** tab.	☐
13	If you use Purchasing, Inventory, or Service Management and your company data folder is inside the **Programs Files** folder, move your data to a different location. See "After You Install" in the *Installation Guide* for more information.	☐
14	Install Accounting and Management Products 9.8 on the workstations. Be aware that the installation process may restart your workstations several times.	☐
15	If you use Estimating, install Estimating Products 9.8 on the server and/or the workstations as desired. Be aware that the installation process may restart your server and workstations several times.	☐
16	Estimating-only workstations: Restart the workstations, log in as the same user that installed the software, open the software, and wait until the configuration process completes.	☐
17	If you use Document Management, log on as a Privileged Operator and turn on security **(Sage Desktop > Tools > Security Administration**). If you do not use Document Management, decide whether to turn on security. After turning on security, modify the **Security Settings** to meet your company's requirements. Be aware that it may take you several hours to apply the security settings, depending on the amount of data and number of users. See *Document Management Get Started* and the *User's Guide* for more information.	☐
18	If you use Document Management, install DocuVault 9.8 on the server that contains or will contain your DocuVault.	☐
19	If you use Document Management, install Document Management 9.8 on the server and then on the workstations. Be aware that the installation process may restart your server and workstations several times.	
20	Restart all programs and services that you shut down for the installation.	☐
21	Open and upgrade your company data folders.	☐
22	If you set up a shortcut to Desktop, you must re-create it after installing 9.8. Select the Desktop.exe in **C:\ProgramFiles\Timberline Office\Shared**. All other applications' shortcuts will continue to work after installing 9.8.	☐