

Sage Timberline Office

# Release Notes

**Estimating Products 9.7**



©2010 Sage Software, Inc. All rights reserved. Sage, the Sage logos and the Sage product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc., or its affiliated entities. All other trademarks are the property of their respective owners.

# Contents

## Release Notes

<b>New in 9.7</b> .....	1
<b>Known Issues</b> .....	4
<b>Fixes</b> .....	5
<b>Further Assistance</b> .....	6

## New in 9.7

- **Estimating Quantity Takeoff Integration**—With this release, estimators can now take full advantage of both 2D and 3D Building Information Models (BIM) when creating estimates. Thanks to our partnership and development work with Autodesk, estimators can enjoy powerful integration between Estimating and Autodesk's Quantity Takeoff (QTO) 2010 product. Using Autodesk's Revit platform for BIM, object quantities and dimensions for items such as doors, windows, and walls can be stored within the Model and then extracted using AutoDesk's QTO. Simply drag and drop to map the Model objects and their dimensions to the estimating database for a one-time integration setup. For more information on accessing Autodesk with Estimating, contact your business partner.
- **Advanced Assembly Databases**—You wanted a bigger, better, and more powerful Estimating database, and now you can have it! The Advanced Assembly Databases are some of the most complete Estimating databases we've ever offered.

Are you not yet taking advantage of Sage Timberline Office Estimating? Or, are you interested in bidding different types of work outside of the normal type of projects you do? If so, these databases will significantly reduce the amount of time you spend getting your estimating system up and running or bidding new types of projects. The 2010 version includes a significant increase in the number of items with the ability to price labor in three different ways: turn-key, man-hour, or labor-only unit price. Plus, assembly items are now organized by trade with over 60 trade specific labor costs supported.
- **Product Enhancement Program**—The 9.7 release includes a special new tool that will help us better understand which enhancements will hold the most value for you in future releases. The 9.7 version of the Product Enhancement Program (PEP) allows us to track when you install new versions of our software. This is just one example of our ongoing commitment to developing leading-edge solutions that meet and exceed your real-world challenges. Participation is automatic with the installation of 9.7 products. If you wish to opt out of the program, open **Tools > Options** and select **Decline**. Once you have opted out, you must clear the **Decline** check box in order to participate again.
- **Windows 7 and Windows Server 2008 R2 Compatibility and Support for Pervasive 10**—Sage Timberline Office is now supported on Windows 7, Windows Server 2008 R2, and includes an upgraded Pervasive 10 database. For more about Sage system requirements, see Section 2 "System Requirements" in the *Installation Guide* which was shipped with your 9.7 DVD.

## New Version of License Manager

A new version of License Manager has been released to support Microsoft Server 2008 and computers running supported 64-bit operating systems. The new version, License Manager 8.3.0, supports:

- Microsoft Server 2008
- Supported versions of 64-bit operating systems

For more information about downloading the latest version of License Manager, see the Knowledgebase article KB193835.

## Supported Operating Systems Change

Sage Timberline Office is now supported on Small Business Server 2008 Premium. We recommend that you install applications on a server other than the domain controller. Before you purchase your new server operating system, we recommend you contact your business partner to better understand the specific configurations and limitations that apply when using Small Business Server 2008 Premium with any of our Sage Timberline Office products.

For answers to many frequently asked questions on Microsoft Small Business Server visit <http://www.microsoft.com/sbs/en/us/faq.aspx>

## Installation Changes for 9.7

If you are upgrading from 9.6, the following installation changes may affect you. If you are upgrading from 9.4.1 or 9.5, review the changes listed in the *Installation Guide*.

The following sections describe the changes in the Sage Timberline Office 9.7 installation. For more information about the hardware and software requirements, see the system requirements listed in the *Installation Guide*. For more information about the prerequisites that Sage Timberline Office installs, see the *Technical System Reference*, which is available on your DVD in the **Documents** folder.

### .NET 3.5 Service Pack 1

If .NET 3.5 Service Pack 1 is not present on your system, it will be installed with other prerequisites. After the installation of .NET 3.5 SP1, your server and workstations will be restarted.

### Pervasive.SQL V10

Beginning with Sage Timberline Office 9.7, Sage Timberline Office will install the Pervasive.SQL V10 database engine. Do not delete this engine from your Windows **Startup** folder. To run correctly and ensure improved performance, the engine must remain in the **Startup** folder. Pervasive.SQL V10 now installs to the **Program Files** directory. Do not change the installation location of any Pervasive 10 files.

### Third-Party Compatibility

Sage Timberline Office has tested and verified the following third-party applications with Estimating. If you upgrade to a newer version of any of these applications after the 9.7 Sage Timberline Office Estimating release and discover compatibility issues, we recommend that you contact that third-party's customer support. We will assist you with the installation

of applications which we provide on the Sage Timberline Office Estimating CD, but we do not provide application support for third-party software.

The following versions of third-party applications have been tested with Sage Timberline Office Estimating 9.7:

Interfacing Applications On the Estimating CD	Interfacing Applications Not On the Estimating CD
Sentinel Driver—7.6.1	Primavera PP—3.0, 3.1
License Manager—8.3.0	Primavera ST—3.0
Cut and Fill—5.33	MS Project—2002, 2003, 2007
Estimating Explorer 2.1	MAS 90/200—4.20, 4.3
Microsoft SQL Server 2005 Express	GTCO driver—10.08
	On-Screen Takeoff—3.7, 3.8




**NOTE:** The following third-party products are not currently compatible with Windows Server 2008: Cut and Fill 5.33, GTCO drivers 10.06 and 10.08, and Primavera Project Manager 3.0.

### Third-Party Integration with Sage Timberline Office

If you use third-party products that integrate with Sage Timberline Office that are not listed in the previous section, contact your software vendor before upgrading to find out which versions of these products are compatible with Sage Timberline Office 9.7.

## Estimate Totals

Always click  (**Recalculate Totals**) or press F6 in the **Totals** window to ensure all changes are included in the totals. Due to the critical nature of estimate totals, it is important to recalculate your estimate before using the final numbers in a bid.

# Known Issues

## **Installing Microsoft SQL Server 2005 Express on a Domain Server**

You cannot install Estimating Products on a domain server (such as Microsoft Small Business Server) unless you manually install Microsoft SQL Server 2005 Express first. This is to prevent potential conflicts with the domain server. SQL Server 2005 Express is needed for Estimating Explorer. For details, see the GetStarted.pdf located on your Estimating Products CD in the Documents folder.

## **Upgrade From 9.4.x May Display Microsoft Error Messages After Restart**

If upgrading from 9.4.x, you may see Microsoft error messages after your server or workstation restarts following the prerequisite installation. These messages will not affect the Sage Timberline Office upgrade. Click through the error messages and continue with the install.

## **Adobe Reader Required to View or Print .pdf Files**

If you install Sage Timberline Office to a machine that does not have Adobe Reader installed, you cannot view .pdf files. In addition, the **Print** option is not available when you use the **Send** feature. Install Adobe Reader to resolve these issues. You can download Adobe Reader at [www.adobe.com](http://www.adobe.com).

## **Crystal Reports Print Preview Window**

When a Crystal report is generated for the first time after installation, you must resize the Print Preview window to view the report. This is because the initial size of the Print Preview window is inadequate for viewing the report. After resizing, subsequent reports open in the last Print Preview window size setting.

# Fixes

The following fixes are found in Sage Timberline Estimating 9.7:

## **Spreadsheet Display**

The inconsistent spreadsheet display when using **Edit > Options > Open estimate** in last used sequence with a custom sort tab has been fixed. The program now displays the data on the spreadsheet correctly.

## **Material Price**

A Material price of "0" will now transfer correctly from Estimating to Buyout workfiles

## **Estimates**

Estimates that had trailing spaces for any of the unit fields for items will now extend the amounts out properly.

## **Performance Improvement**

Performance was improved in Model Takeoff when using an Excel worksheet to update the interview questions.

## **Vendor in Spreadsheet Report**

The **Spreadsheet Report** now correctly shows the vendor name in the **Vendor Name report** column.

## **Material Vendor**

The material vendor is now correctly populated with the vendor that is stored as a default on the material class.

## **Crew Analysis Report**

The Crew Analysis report correctly reports the labor and equipment hours.

## **PDF**

Estimating now correctly exports reports to a PDF format on 64-bit machines.

## **Horizontal Grid Lines Display**

Estimate spreadsheet reports no longer display horizontal row lines beyond the last column of the report.

## **Estimating and Estimating Tools**

When upgrading an estimate file containing the percentage symbol (%) in the estimate name, Estimating Tools no longer stops responding.

If you use Totals Page Templates, Estimating no longer stops responding when switching between these templates after upgrading.



# Further Assistance

## Read Supporting Documentation Before You Install

- The *Installation Guide* (shipped with your 9.7 DVD) includes an overview of this release, installation instructions, system requirements, and contact information.
- If you are upgrading, the *Installation Checklist for Sage Timberline Office* is shipped with your software. It contains a brief description of the steps involved in upgrading your software.
- The *Release Notes* provide details about new features, database changes, known issues, and fixes. This document is available on your DVD in the **Documents** folder. *Release Notes* for earlier releases are available on your DVD in the **Documents\Archives** folder.

These documents are current at the time of the release. To learn about issues that have arisen since this document was published, log on to <https://customers.sagenorthamerica.com/>. See “Sage Customer Portal” below.

## Online Help

Each Sage Timberline Office application includes Help, which provides many answers and instructions at the click of your mouse. To use Help, select Help Topics from the Help menu. An important feature of the Help system is What’s This? Help. For detailed information about each field in an application, press F1 or click the question mark that appears on the toolbar or in the title bar of each window. Drag the question mark over the area in question and release.

## Sage Customer Portal

Get instant access to software services and 24/7 support. Simply log on and get information about software updates and network patches, or view, update, and submit online support incidents. With the Sage Customer Portal, you will have access to the following services:

### Sage Customer Knowledgebase

Access the Sage Customer Knowledgebase 24 hours a day, seven days a week for solutions and answers to thousands of topics as well as software alerts, notices, release guides, and year-end information. This is the same online tool our support staff uses when responding to calls from service plan customers.

To access the Knowledgebase, go to <https://customers.sagenorthamerica.com/> and click **Log on**.

- 1 Enter your email address and password, then click **[Log on]**.

- a If you do not know your password, click the **Forgot your password?** link.  
**Note:** Do not click the **Need to register?** link.
  - b Click **Reset Password**.
  - c Enter and confirm your email address, then enter your first and last name. Click **[Submit]**. A new password will be sent to you.
- 2 After logging on to the portal, click the **Knowledgebase Search** link.

## Release Updates

To get the latest information about this release, log on to the Sage Customer Portal. Click **Documents > For Customers > Sage Timberline Office > Release Materials**. Then click **Sage Timberline Office Release Documents**.

## User Forums

Exchange information with other Sage Timberline Office users. Log on to the Sage Customer Portal and click **Forums**.

## Self Service

Manage your customer support relationship with Sage. View and submit Customer Support Tickets and Customer Service Requests online. Our Customer Support department is available to respond to online inquiries between 6 a.m. and 5 p.m. (Pacific Time) Monday through Friday.

Use the Self Service Details Sheet to view applications you own, the number of uses of each application, activation keys, and service plan information.

## My Profile

View your individual profile, change your telephone contact information, and submit a request to a Sage representative to change other profile information.

## Training Information

Learn about the Anytime Learning and Realtime Learning sessions that are available, view schedules of online sessions, or look for classroom training near you.

You can directly access Sage University from the Help menu in applications (**Help > Sage Timberline Office on the Web > Sage Software University**). This website offers a variety of professional product training options.

# Contact Customer Support

## Online Support Request

If you would like assistance with a solution and your service plan provides phone support:

- 1 Log on to <https://customers.sagenorthamerica.com/>.
- 2 Click **Support > Self Service**.
- 3 On the **My Requests** tab under “**Create**”, click **Customer Support Ticket**.
- 4 Complete the form to submit a support ticket directly to Customer Support.

## Phone Support

If you prefer to speak to Customer Support and your service plan provides telephone support assistance, in the U.S. or Canada call 800-551-8307. Support hours are Monday through Friday from 6 a.m. to 5 p.m. PT (Pacific time).

## Upgrading Your Service Plan

If your service plan does not provide online technical support and you would like to add or upgrade a service plan:

- 1 Call 800-858-7098, or log on to <https://customers.sagenorthamerica.com/>.
- 2 Select **Anonymous Portal Access** on the right.
- 3 Click **Support > Self Service**.
- 4 On the **My Requests** tab under “**Create**”, click **Customer Service Request**.

Complete the form to submit a service request.

© 2010 Sage Software, Inc. All rights reserved. Sage, the Sage Logos and the Sage product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc., or its affiliated entities. All other trademarks are the property of their respective holders.

04/2010

(TCTV#04)