Sage 300
Construction and Real Estate

Sage Document Management

Release Notes

Version 12.1

This version of the software has been retired

sage

Contents

Before You Begin

Read the Supporting Documentation Before You Install

Be sure to read the following supporting documentation before you install:

- The *Document Management User's Guide* includes an overview of this release, installation instructions, system requirements, and contact information.
- The *Installation Checklist* contains a brief description of the steps involved in upgrading your software.
- The *Important* document contains critical late-breaking topics.
- Access a complete library of product documentation.
- Access Knowledgebase article KB1210 for the latest information about the 12.1 release.

Technical Assistance

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

Sage Customer Portal

You may log onto the Sage Customer Portal at https://customers.sagenorthamerica.com/irj/portal/anonymous/login to access any of the following:

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

Sage Customer Support Call Center

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

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

Training Information

Sage University offers online training sessions in both live and recorded formats, with options for every budget, schedule, and experience level. To access Sage University, visit www.sageu.com.

You can also access Sage University from the **Help** menu > **Web Resources > Sage University**.

Upgrading Your Service Plan

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

General Topics

For more information, see Knowledgebase article KB1210.

Upgrade Information for Document Management

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

- Sage 300 Construction and Real Estate12.1
- Sage Estimating 12.1

Upgrade Path

You must upgrade to Document Management 9.7 or 9.8 in order to install 12.1.

If you are using a version earlier than 9.4, you must first upgrade to 9.4, then to 9.8, then to 12.1.

If you are upgrading from 9.4.1 or earlier, you must set up security in Desktop after you have installed 9.8, and BEFORE installing 12.1. See Chapter 6: Security in the Document Management *User's Guide* before you begin the upgrade process.

If you are upgrading from 9.5 or 9.6, you must install 9.8 before installing 12.1. You should already have set up Document Management security.

Before you install Document Management, check with your business partner to ensure you have the latest updates of Sage 300 Construction and Real Estate.

New Activation Code Required

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

New in This Release

Subcontractor Compliance

Two new document classifications (**Certified Reports** and **Misc. Compliance**) are now available on existing compliance types Lien Waiver and Insurance. From the **Subcontractor Compliance Management** hub in Accounts Payable and Project Management, you can quickly and easily query these document types based on the filter criteria you have selected.

Note: Insurance documents can be queried by vendor only, because "Job" is not an existing index for this document type.

Routing approved by name

Routing approved by name has been added to approved stamp. In 12.1, when a routed document is approved, the approver name is added to the approved stamp.

Learn more about the new Subcontrator Compliance feature in the Sage 300 Construction and Real Estate Release Notes.

Known Issues

AP Invoice Batches Locked During Accounting Install

During the Accounting installation, AP 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. 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.

RAM Limitation on Computers with DocuVault

You can not install more than 64G of RAM on a computer where DocuVault is installed. See Knowledgebase article KB533995 for more information.

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.

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.

Learn more about IIS in the *Document Management User's Guide.*

Fixes

Classifying Multiple AP pages

Previously, only first page of a multiple page document was indexed by the DocuVault. The system now indexes all pages the document. You can now view all pages of a document when you run a DM query.

Concurrent license count error

The system now prompts you if you run out of concurrent licenses.

Batches in Scan Queue Caused Performance Issue

Previously, batches remained in the Scan queue instead of sending to the DocuVault. This caused performance issues.

In 12.1, when you link an AP invoice batch, you will receive a prompt asking what you want to do with this batch. You can select to release to DocuVault directly, send to Inbox, or edit or route. You should experience better performance when processing AP invoice documents.

Document Type Security

Document type security was reset when sending to DocuVault. This has been fixed.

Accounts Payable and Document Management Data

AP invoice documents are now updated with the most current data from Accounts Payable.

Detail Window Displayed Incorrectly

Previously, when you opened a document that has been classified as an AP invoice, but contained no detail information, the Detail window displayed incorrectly. This has been resolved.