Installation Checklist

Sage 300 Construction and Real Estate 12.1
(formerly Sage Timberline Office)
Sage Estimating 12.1
Sage Document Management 12.1

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	Document Management users - 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. Review the Document Management *User's Guide* and *Release Notes*.	☐
3	Create a complete backup of all Sage 300 Construction and Real Estate data and program files. See "Chapter 6: System Guidance" in the *User's Guide*.	☐
4	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 300 Construction and Real Estate. See "System Requirements" in the *User's Guide* for more information.	☐
5	Ensure that sufficient hard disk space is available. For example, Accounting and Management Products require up to 2 gigabytes of available hard disk space. See "System Requirements" in the *User's Guide* for more information.	☐
6	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 300 Construction and Real Estate installed. For a list of the required folders, files, and registry keys for your operating system, see "Required Privilege Settings" in the System Requirements chapter of the *User's Guide*.	☐
7	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.	☐
8	If you are running Windows Vista, Windows 7, or Windows Server 2008, elevate your permissions. See "Before You Install" in the *User's Guide* for more information.	☐

9	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 *User's Guide* for more information.	☐
10	If you are upgrading from 9.4.x and use Document Management, delete inactive Document Management users before upgrading to 12.1. See the upgrade path described in the Document Management *User's Guide*.	☐
11	If you use Accounting, install Accounting and Management Products 12.1 on the server. Be aware that the installation process may restart your server several times. See Chapter 2 of the *User's Guide* for instructions.	☐
12	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.	☐
13	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.	☐
14	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 *User's Guide* for more information.	☐
15	Install Accounting and Management Products 12.1 on the workstations. Be aware that the installation process may restart your workstations several times. See Chapter 2 of the *User's Guide* for instructions.	☐
16	If you use Estimating, install Estimating Products 12.1 on the server and/or the workstations as desired. Be aware that the installation process may restart your server and workstations several times. See Chapter 3 of the *User's Guide* for instructions.	☐
17	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.	☐
18	If you use Document Management, install DocuVault 12.1 on the server that contains or will contain your DocuVault.	☐
19	If you use Document Management, install Document Management 12.1 on the server and then on the workstations. Be aware that the installation process may restart your server and workstations several times. See the Document Management *User's Guide* for instructions.	
20	Restart all programs and services that you shut down for the installation.	☐
21	Open and upgrade your company data folders.	☐