

Installation Checklist

Sage 300 Construction and Real Estate 15.1

Sage Estimating 15.1

Sage Document Management 15.1

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

| Step | Description | Done |
|------|---|--------------------------|
| 1 | Read the Important document, Release Notes and the User's Guide for important information regarding this version of Sage 300 Construction and Real Estate (including new requirements) and detailed installation instructions. | <input type="checkbox"/> |
| 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 15.1. 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 Document Management Release Notes for additional information about Document Management. | <input type="checkbox"/> |
| 3 | If you are upgrading, create a complete backup of all data and program files for Sage 300 Construction and Real Estate, Estimating, and Document Management. See "General Information" in Chapter 6 of the User's Guide . | <input type="checkbox"/> |
| 4 | Make sure that you install the appropriate operating system and service pack before you install Sage 300 Construction and Real Estate. See the System Requirements article in the Sage Knowledgebase for more information. | <input type="checkbox"/> |
| 5 | Make sure that your server and workstations meet all other hardware and software requirements, including sufficient hard disk space for program and data files. See the System Requirements article in the Sage Knowledgebase for more information. | <input type="checkbox"/> |
| 6 | Make sure that you have full control of the required 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 "Privilege settings required for installation and use" in Chapter 1 of the User's Guide . | <input type="checkbox"/> |
| 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. | <input type="checkbox"/> |
| 8 | If you are running Windows Vista, Windows 7, or Windows Server 2008, elevate your permissions. See "Before You Install" in Chapter 2 of the User's Guide for more information. | <input type="checkbox"/> |
| 9 | Verify the upgrade path. If you are upgrading from an older version, you may need to install several versions to become current. See "Supported upgrade paths" in Chapter 1 of the User's Guide for more information. | <input type="checkbox"/> |

| Step | Description | Done |
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| 10 | Document Management users: Verify the upgrade path. See “Upgrade Path” in Chapter 1 of the Document Management User’s Guide for more information. | <input type="checkbox"/> |
| 11 | If you use Accounting, install Sage 300 Construction and Real Estate 15.1 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. | <input type="checkbox"/> |
| 12 | If you installed Sage 300 Construction and Real Estate 15.1, 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. | <input type="checkbox"/> |
| 13 | If you installed Sage 300 Construction and Real Estate 15.1, show hidden files and folders. See “After you install” in Chapter 2 of the User’s Guide for instructions | <input type="checkbox"/> |
| 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 shared location. See “After You Install” in Chapter 2 of the User’s Guide for more information. | <input type="checkbox"/> |
| 15 | Install Sage 300 Construction and Real Estate 15.1 on the workstations. Be aware that the installation process may restart the workstations several times. See Chapter 2 of the User’s Guide for instructions. | <input type="checkbox"/> |
| 16 | Estimating users: Install Sage Estimating 15.1 on the server and/or the workstations as desired. Be aware that the installation process may restart the server and workstations several times. See Chapter 3 of the User’s Guide for instructions. | <input type="checkbox"/> |
| 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. | <input type="checkbox"/> |
| 18 | Document Management users: Install DocuVault 15.1 on the server that contains or will contain your DocuVault. | <input type="checkbox"/> |
| 19 | Document Management users: Install Document Management 15.1 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. | <input type="checkbox"/> |
| 20 | Restart all programs and services that you shut down for the installation. | <input type="checkbox"/> |
| 21 | Open and upgrade your company data folders. | <input type="checkbox"/> |
| 22 | If you have custom Crystal Reports designs, you must upgrade them before they can be used in the software. You can run the new Upgrade Crystal Reports Tool, which is on the programs menu; click [Start], select All Programs > Sage > Sage 300 Construction and Real Estate > Reporting and Other Tools , right-click Upgrade Crystal Reports , and then select Run as administrator . For more information, click  (the help button) in the tool’s window. | <input type="checkbox"/> |

 **NOTE:** If you plan to use a new server for Sage 300 Construction and Real Estate, migrate your programs and data (using the instructions in Chapter 5 of the [User’s Guide](#)) before upgrading to Version 15.1.