Installation Checklist

Sage 300 Construction and Real Estate 16.1
Sage Estimating 16.1
Sage Document Management 16.1

Note: If you have Document Management and are upgrading from version 14.1, the changes to DocuVault indexes 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.	☐
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 16.1. 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.	☐
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 the "System Guidance" chapter of the *User's Guide*.	☐
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.	☐
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.	☐
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*.	☐
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 7 or Windows Server 2008, elevate your permissions. See "Before You Install" in Chapter 2 of the *User's Guide* for more information.	☐
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.	☐

Step	Description	Done
10	**Document Management users**: Verify the upgrade path. See "Upgrade Path" in Chapter 1 of the *Document Management User's Guide* for more information.	☐
11	If you use Accounting, install Sage 300 Construction and Real Estate 16.1 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 Sage 300 Construction and Real Estate 16.1, 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.	☐
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.	☐
15	Install Sage 300 Construction and Real Estate 16.1 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*.	☐
16	**Estimating users:** Install Sage Estimating 16.1 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.	☐
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	**Document Management users**: Install DocuVault 16.1 on the server that contains or will contain your DocuVault.	☐
19	**Document Management users**: Install Document Management 16.1 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.	☐
22	If you are upgrading from Sage 300 Construction and Real Estate version 14.1 and have custom Crystal Reports designs, you must upgrade them before they can be used in the software. You can run the 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.	☐

✳ **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 4 of the *User's Guide)* before upgrading to Version 16.1.