Installation Checklist

Sage 300 Construction and Real Estate 17.1
Sage Estimating 17.1
Sage Document Management 17.1

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. **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 17.1.	☐
2	Have your **Registration Name** and **Sage Client ID** (Account ID) handy. The ID is a 10-digit number that starts with 4. Also review the number of uses your company has purchased for each application by logging onto the Sage Customer Portal; see Knowledgebase article 87017 for more information. If you need to purchase additional uses, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com).	☐
3	**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 17.1. 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* for additional information about Document Management.	☐
4	If you are upgrading from an earlier version: • Create a complete backup of all data and program files for Sage 300 Construction and Real Estate (using File Tools), Estimating, and Document Management. • Run File Doctor on all files. Even if you do not receive a corrupt file message, there may be issues File Doctor finds that it will not be able to fix after upgrading to 17.1.	☐
5	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.	☐
6	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.	☐
7	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 these for your operating system, see "Privilege settings required for installation and use" in Chapter 1 of the *User's Guide*.	☐
8	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.	☐

Step	Description	Done
9	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.	☐
10	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.	☐
11	**Document Management users**: Verify the upgrade path. See "Upgrade Path" in Chapter 1 of the *Document Management User's Guide* for more information.	☐
12	If you use Accounting, install Sage 300 Construction and Real Estate 17.1 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.	☐
14	If you installed Sage 300 Construction and Real Estate 17.1, 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.	☐
15	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.	☐
16	Install Sage 300 Construction and Real Estate 17.1 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.	☐
17	**Estimating users:** Install Sage Estimating 17.1 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.	☐
18	**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.	☐
19	**Document Management users**: Install DocuVault 17.1 on the server that contains or will contain your DocuVault.	☐
20	**Document Management users**: Install Document Management 17.1 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.	☐
21	Open and upgrade your **company** data folders.	☐
22	If you plan to run Sage SQL Replicator, use the Sage Universal SQL Installer to install an instance of the SQL database to hold your data. See the *Sage SQL Replicator and Mobile Projects Setup Guide* for instructions.	☐
23	Restart all programs and services that you shut down for the installation.	☐

Step	Description	Done
24	If you are upgrading from Sage 300 Construction and Real Estate version 14.1 (or earlier) and have custom Crystal Reports designs, you must upgrade them before they can be used in the software by running the Upgrade Crystal Reports tool. • In Windows 7, 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**. • In Windows 10 on the programs menu, select the **Sage Administration** program group, right-click **Upgrade Crystal Reports**, and then select **Run as administrator**. For more information about the tool, click ⍰ (the help button) in the tool's window.	☐