



Sage Document Management

Version 14.1

Release Notes

**This version of the software
has been retired**

Version 14.1

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General Information



CAUTION: If you install DocuVault on a server with the Windows Server 2012 operating system (64 bit), DocuVault printer and native file functionality will only be available on Document Management client workstations with a 64-bit operating system.

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 Estate version 14.1
- Sage Estimating version 14.1

Upgrade path

You must upgrade to Document Management version 9.7, 9.8, or 12.1 in order to install version 14.1.

If you are upgrading from 9.5 or 9.6, install 9.8 before installing version 14.1. You should already have set up Document Management security.

If you are using a version earlier than 9.4, you must first upgrade to version 9.4, then to 9.8, then to 14.1.

If you are upgrading from version 9.4.1 or earlier, you must set up security in Desktop after you have installed version 9.8, and BEFORE installing version 14.1. See **Chapter 6: Document Management Security** in the Document Management [Document Management User's Guide](#) before you begin the upgrade process.



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

Activation code

If you are using a version earlier than 9.6, a new activation code is required for installing 9.6.1 or later, due to major enhancements to the DocuVault and Document Management in 9.6. 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 version 9.6.1 or later.

Support and Assistance

Supporting documentation

In addition to reading this document, read the following supporting documentation before you install:

- The [Document Management User's Guide](#) contains information about system requirements, security, Crystal Reports, and ODBC as well as installation steps for Sage 300 Construction and Real Estate and Sage Estimating.
- The [Installation Checklist](#) contains a brief description of the steps involved in upgrading your software.

You can access a [complete library of supported product documents](#).

Training

Sage University offers live and recorded online training sessions to help you get the most out of your software. To access Sage University, either:

- From an application, select **Help > Web Resources > Sage University**.
- From your browser, visit <http://www.sagesoftwareuniversity.com/>.

Contact your business partner for local training.

Technical assistance

When you need assistance, refer to the [How do I get technical support for Sage 300 Construction and Real Estate?](#) article to determine which service works best for you.

New in this Release

Support for new operating systems

Version 13.1 is able to be installed on computers with the Windows 8 or Windows Server 2012 operating systems. Version 14.1 can also be installed on computers with the Windows 8.1 or Windows Server 2012 R2 operating systems.



NOTE: We no longer support the Microsoft Windows XP or Microsoft Server 2003 operating systems due to changes in Microsoft support for these old operating systems.

For a complete list of supported operating systems, see chapter 3 of the [Document Management User's Guide](#).

Fixes

Batches in Scan queue

Moving a page from a multi-page batch to a different batch in the Scan queue no longer causes problems.

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 14.1. 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 cannot install more than 64G of RAM on a computer where DocuVault is installed.

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](#).