

Sage Document Management

Version 18.1 and 18.2

Release Notes

**This product
has been retired**

This is a publication of Sage Software, Inc.

© 2019 The Sage Group plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors. All other trademarks are the property of their respective owners.

Sage End User License Agreement: <http://na.sage.com/sage-na/eula>

Version 18.1 and 18.2 (There is no Document Management version 18.3)

Last updated: Monday, August 12, 2019

Table of Contents

- General Information 1**
- Support and Assistance 4**
- New in this release 5**
- Known Issues 5**

General Information

Document Management will be retired December 31, 2019; see [Knowledgebase article 91616](#) for more information about the retirement.

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

Important! There is no 18.3 version of Document Management. If Document Management integrates with Sage 300 Construction and Real Estate Accounting, **DO NOT** upgrade Accounting to version 18.3. If you install Sage 300 Construction and Real Estate Accounting 18.3, Document Management and DocuVault **will be removed**.

Tip: If you run Document Management in a standalone environment, you can upgrade Sage 300 Construction and Real Estate Accounting to version 18.3; see [Knowledgebase article 91608](#) for more information.

If you plan to use Sage 300 Construction and Real Estate Accounting to version 18.2, you must install Sage 300 Construction and Real Estate version 18.2 before you install Document Management version 18.2.

If you plan to use Sage 300 Construction and Real Estate Accounting to version 18.1, you must install Sage 300 Construction and Real Estate version 18.1 before you install Document Management version 18.1.

Installation paths

If you are on Document Management version 16.1 or 17.1, you can upgrade Sage 300 Construction and Real Estate directly to version 18.1 or 18.2 and then upgrade Document Management directly to 18.1 or 18.2.

If you are on Sage 300 Construction and Real Estate and Document Management version 14.1 or 15.1, first upgrade both products to version 16.1.

If you are on a version that is earlier than 14.1, we recommend that you contact your Business Partner for assistance.

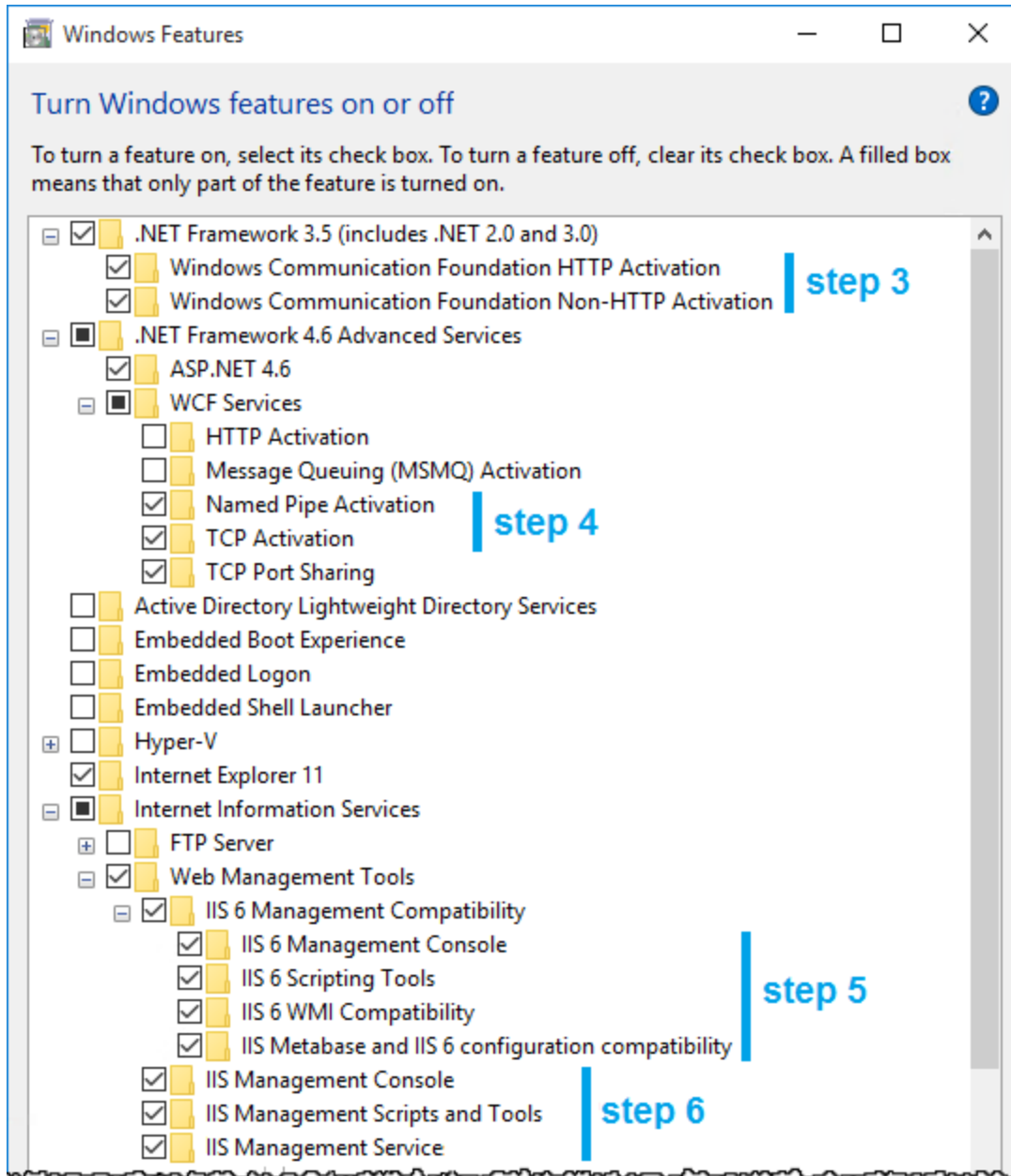
Important! The 15.1 release of Document Management included changes to DocuVault indexes, which may take a long time to complete. If you are upgrading from a version prior to 15.1, we recommend that you plan the timing of your upgrades so they will complete during non-work hours.

Windows feature settings for Windows 10

Note: We do not recommend installing DocuVault on a computer with the Windows 10 operating system unless you are a consultant and use a VAR key.

Before installing Document Management or DocuVault on a computer with Windows 10, you must manually set certain Windows features. To do this:

- 1 On the Windows desktop in the lower left corner, right-click the Start icon button and select **Programs and Features**.
- 2 On the left side of the **Programs and Features** window, click **Turn Windows features on or off**.
- 3 In the **Windows Features** window, select the following check boxes under **.NET Framework 3.5 (includes .NET 2.0 and 3.0)**:
 - Windows Communication Foundation HTTP Activation
 - Windows Communication Foundation Non-HTTP Activation
- 4 Select the following check boxes under **.NET Framework 4.6 Advanced Services** and under **WCF Services**:
 - Named Pipe Activation
 - TCP Activation
- 5 Select the following check boxes under **Internet Information Services**, under **Web Management Tools**, and under **IIS 6 Management Compatibility**:
 - IIS 6 Management Console
 - IIS 6 Scripting Tools
 - IIS 6 WMI Compatibility
 - IIS 6 Metabase and IIS 6 configuration compatibility
- 6 Select the following check boxes under **Internet Information Services** and under **Web Management Tools**:
 - IIS Management Console
 - IIS Management Scripts and Tools
 - IIS Management Service
- 7 Click **[OK]** to save the settings.
- 8 If you see the **Windows needs to reboot your PC to finish installing the requested changes message**, click **[Restart Now]**.



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.sageu.com/Sage300CRE>.

Contact your business partner for local training.

Technical assistance

When you need more assistance, visit [Sage Customer Resources](#), the [Sage Knowledgebase](#), [Sage City](#), the [Product Documents website](#), [Live Chat](#), or [Online Case submission](#).

New in this release

There were no major updates to Sage Document Management for this release. The Document Management version 18.1 and 18.2 releases are required for compatibility with the Sage 300 Construction and Real Estate Accounting version 18.1 and 18.2 releases.

New in the 15.1 release

Improved indexing

Indexing is now at the document level. This should result in faster searches and improved reliability.

Support for the Windows 10 operating system

Although we recommend that Document Management be installed on a server, Document Management Version 15.1 and later can be installed on computers with the Windows 10 operating system. See [“Windows feature settings for Windows 10” on page 2](#) for more information.

For a complete list of supported operating systems for 18.1 and 18.2, see the [System Requirements article in the Sage Knowledgebase](#).

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 18. 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*](#).