Sage 300 Construction and Real Estate (formerly Sage Timberline Office)

Version 16.1

Release Notes

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Version 16.1

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Release Overview

About this document

This document contains information about the current release of Sage 300 Construction and Real Estate. Each Sage 300 Construction and Real Estate application is described in a separate section, which includes information about new features and enhancements for the release, resolved issues, and any known issues.

In addition to reading this document, read the supporting documentation before you install. See "Supporting documentation" (the next section).

About this release

The 16.1 release of Sage 300 Construction and Real Estate includes enhancements and software fixes. For information about the changes made in a specific application, refer to the appropriate section in this document. Highlights of this release are listed in the following table.

Application	Features and enhancements
general	"Support for the latest operating systems" on page 6 "Upgrades to the latest components" on page 6
Desktop	"Desktop" on page 8

You can also view the Release Highlights video to learn more about the new features and enhancements.

CAUTION: There is no 16.1 version of Residential Management. DO NOT install the 16.1 version of Accounting if you use Residential Management.

CAUTION: At this time, **do not install the 16.1 version of Accounting if you use OfficeConnector or MyAssistant** due to compatibility issues with the new Simba ODBC driver; see "MyAssistant" on page 10 for more information.

Support and Assistance

Supporting documentation

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

- The *Important* document contains critical and late-breaking topics.
- The *Installation Checklist* contains a brief description of the steps involved in upgrading your software.
- The *User's Guide* contains installation steps for Sage 300 Construction and Real Estate and Sage Estimating.

You can access a complete library of supported product documents.

Online help

Each Sage 300 Construction and Real Estate application includes online help, which provides information about procedures as well as items in the windows.

To access the help in the software:

- In a window, click the [**Help**] button, click (the help icon button), or press F1 to display the help topic for that window.
- In an application, select **Help > Help Topics**.
- In the Desktop, select **Help > Application Help**, and then choose the desired application.

To aid you in finding information, the online help for each application includes the following tabs:

- **Contents** tab with an outline of the help with links to the help topics.
- **Index** tab with keywords that link to help topics related to that keyword.
- **Search** tab, where you can type text and click [**Search**] to locate that text in the help topics.

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 Desktop, select **Tasks > Sage 300 Construction and Real Estate > Web Resources > Sage University**.
- From your browser, visit http://www.sageu.com/help/Sage300ConstructionandRealEstate.

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.

Installation

Before you install this version, review the **Install Sage 300 Construction and Real Estate** chapter in the *User's Guide*, which provides step-by-step instructions.

The installer detects old operating systems (including Windows XP, Windows Vista, Windows Server 2003, and Windows Server 2008 R1) and will prevent the installation of Sage 300 Construction and Real Estate. For a complete list of supported operating systems, see the System Requirements article in the Sage Knowledgebase.

Sage 300 Construction and Real Estate version 16.1 includes installation of Pervasive 12. Your server and workstations must have Internet access to install and use this software.

When you launch the workstation install, there may be a delay as the installer verifies the system components. If Windows had pending updates or components were missing, the workstation may reboot during the installation.

CAUTION: Residential Management - **There is no 16.1 version of Residential Management. DO NOT install the 16.1 version of Accounting if you use Residential Management.**

TIP: If you are planning to run Sage 300 Construction and Real Estate on new hardware, use the Server Migration tool. See chapter 5 of the ***User's Guide*** for instructions.

Installation paths

If you are on version 14.1 or 15.1, you can upgrade directly to version 16.1.

If you are on version 13.1, we recommend that you first upgrade to version 14.1 and upgrade your data (including Inventory, Purchasing, and Service Management data) before upgrading to version 16.1.

If you are on a version that is earlier than 13.1, we recommend that you contact your Business Partner for assistance.

IMPORTANT: If you also use Document Management or Sage Estimating, you must upgrade both products to the same version. For more information, see the **Upgrade paths** section in **Chapter 1** of the *User's Guide*.

Installation notes

IMPORTANT: If you use third-party products that integrate with Sage 300 Construction and Real Estate, check with your software vendor prior to upgrading to ensure their product is fully compatible with this release. We **do not** support rolling Sage 300 Construction and Real Estate back to a previous version and **do not** recommend it.

CAUTION: At this time, **do not install the 16.1 version of Accounting if you use OfficeConnector or MyAssistant** due to compatibility issues with the new Simba ODBC driver; see "Simba ODBC driver compatibility issues" on page 10 for more information.

- **Crystal Reports designs** - The 14.1 release included changes to Crystal Reports. If you use custom Crystal Reports designs and are currently on a version prior to version 14.1, you need to run the Upgrade Crystal Reports Tool *after* installing Sage 300 Construction and Real Estate 14.1, 15.1, or 16.1 and upgrading your data files. 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.
- **Document Management** - 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.
- **Document Management** - 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.
- **Estimating** - If you use Sage Estimating, you must install Sage Estimating 16.1 *after* installing Sage 300 Construction and Real Estate 16.1.

Resolved issues

Pervasive setting

During Accounting client installation, the Pervasive client cache setting is now enabled by default.

Database Changes

As with any release, database changes in Sage 300 Construction and Real Estate applications may affect your custom report designs or custom third-party applications. Contact your authorized business partner to discuss any issues relating to custom reports or third-party applications.

To view fields contained in new records:

- In Report Designer, view the Available Fields report (by selecting **Tools > Available Fields**).
- In Crystal Reports Designer, open an existing report, specify the data source location, add new or modified records, and view the fields through Field Explorer. For more information about this procedure, refer to the **Crystal Reports** chapter of the ***User's Guide***.

General Topics

New features and enhancements

Support for the latest operating systems

This release of Sage 300 Construction and Real Estate is supported on the following:

- Server operating systems: Windows Server 2008 R2, Windows Server 2012 R1, and Windows Server 2012 R2.
- Client operating systems: Window 7, Windows 8.1, Windows 10.

NOTE: Sage 300 Construction and Real Estate is no longer supported on Windows XP, Windows Vista, Windows Server 2003, or Windows Server 2008 R1 operating systems, due to changes in Microsoft support for these old operating systems

Upgrades to the latest components

This release includes the following upgrades:

- Simba ODBC driver upgrade to version 10.
- Actian Pervasive upgrade to version 12, which resolves a series of compatibility issues with Microsoft updates.
- .NET upgrade to version 4.5.2.
- Office Connector to 2431

Important notes

Remote print

If you plan to use the remote print feature, you need to change the logon account for the Sage Remote Print service on the server to one that has network permissions to print to the printers; the default Local System account may not work.

Resolved issues

Crystal Reports improvements

When you preview a Crystal Report and click the **Email** icon, you can now use the mouse as well as the keyboard to interact with the email window.

When you select a Crystal Report from the **Reports** menu in an application, the **Print Selection** window displays more quickly.

Accounts Payable

There were no major updates to Accounts Payable for this release.

Resolved issues

Lien waivers

You can now successfully send an email with a lien waiver to the vendor from the **Lien Waivers** tab of the **Subcontractor Compliance Management** window within Accounts Payable (using **Tasks > Subcontractor Compliance Management**).

Accounts Receivable

There were no major updates to Accounts Receivable for this release.

Address Book

There were no major updates to Address Book for this release.

Billing

There were no major updates to Billing for this release.

Cash Management

There were no major updates to Cash Management for this release.

Contracts

There were no major updates to Contracts for this release.

Desktop

New features and enhancements

Updated Desktop

This release includes a modernized Desktop. You can use the Desktop to access:

- Your Sage 300 Construction and Real Estate application tasks, reports, and inquiries.
- Other Sage applications that integrate with Sage 300 Construction and Real Estate.
- Web pages that you access for information while performing your job.
- Favorite items (tasks, files, and web links) that you want to access frequently.

View the Desktop First Look video for an overview. For information about using the new Desktop, select **Help > Help Topics** in the Desktop menu to view the online Help.

If you customized your Desktop in a prior version, you can select and upgrade that desktop file. Before installing 16.1, make a note of the location of your existing desktop configuration. After installing 16.1, open Desktop, select **Options > Open Configuration**, locate the older desktop file (which has a dsk extension), and click [**Open**]. The older desktop file will then be automatically upgraded. If you want to use this configuration whenever you open desktop, select **Options > Desktop Settings**, click [**Current**] (to select the old configuration that you just upgraded), and then click [**Save**]. For more information, refer to Knowledgebase articles 18289 and 77229.

About TS-Main

Because you can quickly access applications from Sage Desktop, you no longer need to access them through TS-Main. You can even launch a particular application task from Desktop. All existing shortcuts for TS-Main now launch Desktop; TS-Main has been removed from the Windows Start menu. If you need to use TS-Main for other activities, you can access it from the applications list in Desktop.

Equipment Cost

There were no major updates to Equipment Cost for this release.

Financial Statements

There were no major updates to Financial Statements for this release.

General Ledger

There were no major updates to General Ledger for this release.

Information Assistant

There were no major updates to Information Assistant for this release.

Inquiry

There were no major updates to Inquiry for this release.

Inventory

There were no major updates to Inventory for this release.

Resolved issues

Data folders

If you use more than one company data folder and change the current company, client workstations now properly switch to the current company folder—and show its accounting data for Purchasing and Inventory.

Job Cost

There were no major updates to Job Cost for this release.

MyAssistant

CAUTION: At this time, **do not install the 16.1 version of Accounting if you use MyAssistant** due to compatibility issues with the new Simba ODBC driver. See "Simba ODBC driver compatibility issues" (on this page) for more information.

ODBC

The Simba ODBC driver was updated to the latest version (version 10). This version is now used by programs and reporting tools that use ODBC to extract Sage 300 Construction and Real Estate and Sage Estimating (Pervasive) data. Most reports now run faster; some complex reports run significantly faster.

For more information about using the ODBC driver, see the **Sage 300 Construction and Real Estate ODBC** chapter of the ***User's Guide***.

Known issues

Simba ODBC driver compatibility issues

There are a few Simba ODBC driver compatibility issues. These do not affect the core Sage 300 Construction and Real Estate functionality. However, these issues affect MyAssistant and OfficeConnector—and may affect other 3rd Party or custom applications that access the data using ODBC. We recommend that you **do not upgrade to version 16.1 at this time if you use these products**. Because Sage 300 Construction and Real Estate offers customers an ability to implement a wide variety of customizations and integrations, it is not possible for Sage to tell you whether you are directly impacted. It is imperative that you follow up with any 3rd party integration partners before you choose to upgrade.

The following Simba ODBC driver compatibility issues include changes that you may need to be aware of and changes that will be addressed in a future update.

- If credentials are passed into the Simba ODBC via SQL NO PROMPT, error codes returned for invalid credentials have changed from prior versions of Sage 300 Construction and Real Estate.
- SQL queries that would result in division by zero now return a hard error. In version 15.1 and prior versions, incorrect data was returned instead.
- SQL queries that use a GROUP BY clause nested in a compare operation when only a single row of data is expected now incorrectly return a cardinality error. Until a solution is available, add a SELECT TOP 1 statement to the problematic query.
- Extra rows of data can be returned in queries that contain multiple nested LEFT OUTER JOIN statements. Until a solution is available, use EQUAL JOIN statements.

- The "IN" keyword does not work consistently when directly querying Simba. Crystal Reports are not affected in most cases (because Crystal Reports automatically converts IN statements to OR statements), nor are bulk reads used in most Excel or Access workflows. However, .NET ODBC access that uses "IN" within a query may return incorrect data. Until a solution is available, change your query syntax to use "OR" statements.

Payroll (Australia)

There were no major updates to Australian Payroll for this release.

Payroll (Canada)

There were no major updates to Canadian Payroll for this release.

Payroll (United States)

There were no major updates to United States Payroll for this release.

Project Management

There were no major updates to Project Management for this release.

Resolved issues

Field reports

You can now successfully print a field report that you opened within Project Management (using **Documents > Field Reports**).

Lien waivers

You can now successfully send an email with a lien waiver to the vendor from the **Lien Waivers** tab of the **Subcontractor Compliance Management** window within Project Management (using **Contract Control > Subcontractor Compliance Management**).

Property Management

There were no major updates to Property Management for this release.

Purchasing

There were no major updates to Purchasing for this release.

Resolved issues

Data folders

If you use more than one company data folder and change the current company, client workstations now properly switch to the current company folder—and show its accounting data for Purchasing and Inventory.

Remote Time Entry

There were no major updates to Remote Time Entry for this release.

Report Designer and Reporting

There were no major updates to Report Designer for this release.

Residential Management

CAUTION: There is no 16.1 version of Residential Management. DO NOT install the 16.1 version of Accounting if you use Residential Management.

Sage Installation Manager

There were no major updates to Sage Installation Manager for this release.

Sage System Verifier

There were no major updates to Sage System Verifier for this release.

Security Administration

There were no major updates to Security Administration for this release.

Server Migration

There were no major updates to Server Migration for this release.

Service Management

There were no major updates to Service Management for this release.