



V1  
Document  
Management

Invoice Automation for Infor SunSystems

Server Installation

June 2019

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# 1. Introduction

Intended for experienced Sun Partners, V1 and fully trained partners **only**, this is a guide for installing the server components.

For reference, this document will refer to the solution as **IAIS**, Invoice **A**utomation for **I**nfor **S**unSystems

You are encouraged to bookmark the Portal which is regularly updated with information about the release:

<http://support.wearev1.com/software/Sun/>

On the portal this document is complimented by videos which walk you through the installation and patching procedures.

## 2. Pre Installation Information

- ▶ For a small implementation, you are advised to install it on the Sun Application Server.
- ▶ For a medium implementation, you advised to install it on its own server, although not essential.
- ▶ For a large implementation, you advised to always install it on its own server.
- ▶ IAIS is only compatible with Windows (versions 2008 R2 onwards)
- ▶ IAIS is only compatible with SQL Server (versions 2008 R2 onwards)
- ▶ Although it is recommended to install them on the same instance of SQL Server as SunSystems (assuming this is also SQL), it is not a requirement.
- ▶ IAIS is only available in SQL.

### 3. Pre Installation Tasks - Database

*This can be done at any-time in advance of the installation.*

#### **Optional V1USER**

You are advised to create a dedicated SQL login called **V1USER** whose sole job will be to connect and administrate the V1 databases.

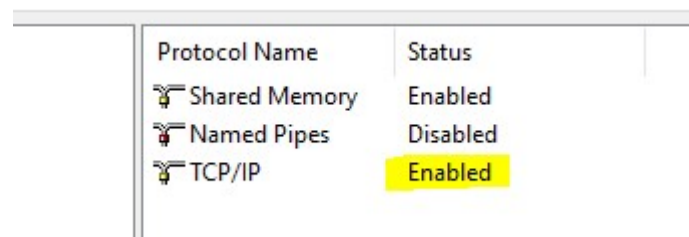
If you're comfortable using 'sa' then skip this step and use the 'sa' credentials when prompted by the setup program.

1. Open the SQL Management console and connect to the instance you intend to install IAIS
2. Double click Security
3. Right click on Logins and select New Login ...
4. Give a login name of **V1USER**
5. Select SQL Server authentication
6. Confirm the desired password
7. Un-tick enforce password policy
8. Click Server roles on the left hand side
9. Click dbcreator, sysadmin and public
10. Click OK

#### **Mandatory TCP-IP Configuration**

The SQL Server must be configured to allow TCP-IP connections.

1. Open the SQL Server Configuration manager
2. Double click on SQL Server Network Configuration
3. Click on Protocols for <SERVERNAME>
4. In the pane on the right hand side, ensure TCP/IP is enabled



The image shows a screenshot of the SQL Server Network Configuration window. It displays a table with two columns: 'Protocol Name' and 'Status'. The 'TCP/IP' protocol is highlighted in yellow and is set to 'Enabled'. The other protocols shown are 'Shared Memory' (Enabled) and 'Named Pipes' (Disabled).

Protocol Name	Status
Shared Memory	Enabled
Named Pipes	Disabled
TCP/IP	Enabled

5. At a convenient time, restart the SQL Server (<INSTANCENAME>) service to commit the change

## 4. Setup Program Functionality Requirements

In order to use some of the enhanced features of the setup program, the following assemblies must be present on the **server that runs the setup program**:

**C:\Windows\assembly\Microsoft.SqlServer.Smo Version 10.0.0.0**

If you do **not** have these assemblies on the server you are installing on, there are 2 ways to sort it out:

1. If you already have a SQL instance you want to use, but don't have the assemblies on the server:

From the distribution in the \utils directory

**Run** the SQLSysClrTypes.msi (agree to defaults)

Then

**Run** the SharedManagementObjects.msi (agree to defaults)

Installing these components will give you the necessary assemblies.

**OR**

2. Click here: <https://www.microsoft.com/en-gb/download/details.aspx?id=30438>  
Install SQL Express 2008 R2 and agree to the defaults, in doing so, it adds the required assemblies.  
This can then be used for IAIS if required

### 4.1 SQL

- ▶ The SQL Server is accessible by the V1 server you're installing on
- ▶ Ensure the "SQL Server Browser" service is started on the SQL Server
- ▶ Ensure SQL user credentials are known and this user has dbcreator permissions and you have knowledge of the instance. This does not have to be the same as Sun, but it is recommended.

## 5. IAIS Functionality requirements

IAIS is the method by which inbound Purchase Invoices (GESPIH) are either scanned in, imported as PDFs or extracted as email attachments.

These Invoices are imported into the IAIS queue.

They go through an OCR process to be identified, matched and processed.

When accepted they are created in the Sun database and the image archived in DbArchive.

During the installation you will be prompted for the following details and they must be known **before** running the setup program to ensure setup is completed successfully.

IAIS is only available on Windows 2012 R2 onwards and on a SQL platform, version 2008 R2 onwards.

See the Platform requirements document on the portal for more details.

### 5.1 Mailbox

As standard, IAIS now has the capability to poll multiple mailboxes for PDF attachments.

These attachments are automatically extracted and imported into the PIA system.

Create dedicated email addresses and supply them to your suppliers.

- ▶ Ensure you have the username and password to access these mailboxes.

## 6. Before running the SunSetup program

Before beginning the installation, it is best practice to run through the following bullet points to ensure the installation runs smoothly.

If any of these are missed, you risk delaying or jeopardizing a successful installation.

- ▶ All the steps and considerations of the previous chapters have been satisfied
- ▶ You have your V1 licenses to hand and they're uncompressed and accessible to the server where you are installing, in our **example** we will assume C:\V1LICs  
  
These will include all the required .CAL and any required .KEY files.
- ▶ You know the SQL server name and credentials of the intended SQL instance to install on
- ▶ You know the hostname or IP address of the server you are about to install on
- ▶ You know the mail server address and credentials for the inbound-delivery of emails
- ▶ Ensure the **SQL Server Browser** service is running on the SQL Server where you intend to install IAIS
- ▶ If you intend to use a service user account for the V1 services, make sure this has been set to 'logon as a service'.
  - ▶ Logon to the computer with administrative privileges.
  - ▶ Open 'Administrative Tools' and open the 'Local Security Policy'
  - ▶ Expand 'Local Policies' and click on 'User Rights Assignment'
  - ▶ In the right pane, right-click 'Log on as a service' and select properties.
  - ▶ Click on the 'Add User or Group...' button to add the new user.
  - ▶ In the 'Select Users or Groups' dialogue, find the user you wish to enter and click 'OK'
  - ▶ Click 'OK' in the 'Log on as a service Properties' to save changes.

If for whatever reason any of the above are not done **STOP**.

You will encounter issues / problems down the line if you skip any of this and it will cause often lengthy delays to the project.

If you're confident everything is done, you have everything to hand you need, you're good to go to the next chapter.

*NOTE: There are various commits to the registry which the setup program will refer to once run the first time:*

HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\V1SunIntegration



## 7. Download and run the SunSetup program

1. Navigate to the portal (<http://support.wearev1.com/software/Sun/>) click the Downloads > Distribution menu and download the distribution (username is **v1** the password is **software**)

*NOTE: Indicative size of installation is 1.3GB*

2. When downloaded, right click on the zip file and click Properties. Click the unblock tick box and click Apply.

*NOTE: This prevents binaries being flagged as insecure on certain operating systems during installation.*

3. Un-compress it to a temporary location, in our **example** will assume C:\temp\IAIS
4. Navigate to C:\temp\IAIS, right click and run sunsetup.exe **AS ADMINISTRATOR**
5. Select Server Installation, click Next >
6. A summary of your server is displayed

*NOTE: If less than 7 gig of usable RAM is detected, installation will not be permitted*

*NOTE: If less than 10 gig of usable disk-space is detected, installation will be permitted but a warning is generated*

Confirm the desired location of the server components (**avoid spaces in this path**)

- This is the home directory for the server side components such as DbLogin, DbArchive and DbCapture.

Confirm the desired location of the client components to be installed on the server

- This is the home directory for all the client components that you install on the server, such as the DbLogin Admin Console

When satisfied, click Next >

7. Browse to C:\V1LICS and click Apply. The licenses are copied to a temporary location, analyzed and a summary of what is found is displayed at the top of the window.

If what is displayed is **NOT** as expected. **STOP**.

Close the setup program and contact your Infor or V1 account manager requesting the licenses expected.

When received, un-compress them and repeat the above steps.

If what is displayed is what is expected, click Next >

## 8. V1 Database Setup

### Pre-Install Checks

- ▶ Ensure the correct assemblies have been installed if not already present
- ▶ Ensure the SQL Browser Agent service is running on the SQL server
- ▶ Ensure you know the instance and credentials to access it
- ▶ Ensure the V1 database has not previously been created, as this procedure creates them and will otherwise fail if the V1 database had been created prior to running this setup.

### Procedure

1. Click the List button to return a list of available SQL instances on the network
2. Pick from the list the instance to create the databases need by IAIS
3. Pick the desired DSN Driver
4. Enter the SQL username
5. Enter the SQL password

*NOTE: Windows Authentication is not permitted.*

6. Click the Test button

*NOTE: The credentials are tested to ensure they are permitted to create / administrate a SQL database using the instance specified in the dropdown. Only then can the remaining options be completed.*

## 9. Service User Account

### Pre-Install Checks

- ▶ Ensure you know the username and password of the Service Account user you wish to assign to the V1 services

### Procedure

This is *optional*, if you do not wish to use a service account, leave the dropdowns blank and the services will be installed as the Local System Account.

If selected, *all* V1 services will be assigned these credentials so it is important to ensure it has 'Logon As a Service' rights.

If we assume you want to use .\Administrator, this needs to exist as a local system account and be added in the Local Security policy. Follow these instructions to check:

- ▶ Open 'Administrative Tools' and open the 'Local Security Policy'
  - ▶ Expand 'Local Policies' and click on 'User Rights Assignment'
  - ▶ In the right pane, right-click 'Log on as a service' and select properties.
  - ▶ Check that Administrator is added to this list, if it is, close this and return the SunSetup program, if not:
    - ▶ Click on the 'Add User or Group...' button to add the new user.
    - ▶ In the 'Select Users or Groups' dialogue, find Administrator and click 'OK'
    - ▶ Click 'OK' in the 'Log on as a service Properties' to save changes.
    - ▶ Close this and return the SunSetup program
1. All Service Account users found on this server are listed, pick the one required
  2. Confirm the password for this user

*NOTE: The credentials are NOT validated at this stage. If they fail to be applied, the services will not start.*

## 10. DbCapture

### Pre-Install Checks

- ▶ Ensure you know the location either on the server or as a share location of where PDF's are to be imported from

### Procedure

1. Click the button to browse to the desired location of where PDF's are to imported from
2. Choose a polling frequency for often the check is made. Once found, they are automatically imported into IAIS

*NOTE: These settings can be adjusted post installation if required so you're advised to choose a relatively short time at this point for testing purposes*

## 11. Ready to Install

When satisfied all options are satisfied and entered, click **Install**

### Actions Performed

- DbArchive, DbCapture and DbAuthorise databases created as per V1 Database Setup details
- All V1 Db\* services installed, started and assigned the service user account credentials if applicable
- DbLogin has a preconfigured setup pre-initialized with typical settings already added
- DbArchive initialized and tables added
- CacheClean installed
- DbCapture Profile copied, defs configured as per V1 Database Setup details
- DbAuthorise sample routes added
- DbForm copied
- SmartSuite installed
  - SmartMail pre-configured with examples
  - SmartSuite pre-configured based on selections
  - Rebranded to have a look and feel of SunAccounts
- ABBYY11 installed
- Utils copied (useful files for system management)
- Registry commits of the paths / ports thus far

When completed, you will be prompted to install clients on the server, although not essential, it is recommended (see next chapter.)

### Service List

The following is the complete set of services which should be present once the server installation has been completed:

- ▶ ABBYY SDK 11 Runtime License Service - Licensing Service
- ▶ ArchJSON
- ▶ DbArchive: Cache Cleaner
- ▶ DbArchive: SQL Read Server: 31418
- ▶ DbArchive: SQL Read Server: 31417
- ▶ DbAuthorise: Primary SQL Deposit Server 31420
- ▶ DbAuthorise: Primary SQL Deposit Server 31421
- ▶ DbCapture: Capture Service
- ▶ DbCapture: DbCapComms Admin Client:31451
- ▶ DbCapture: DbCapComms Interactive Client:31450
- ▶ DbCapture: DbCapComms Util Client:31452
- ▶ DbCapture: Export Service
- ▶ DbCapture: OCR Server
- ▶ DbCapture: PDF File Watcher
- ▶ DbCapture: Queue Management
- ▶ DbLogin: Authentication Server
- ▶ V1NodeIntegrationServer
- ▶ V1SmartMail
- ▶ V1WebPortal

Ensure *all* services where applicable have been started.

## 12. Client Installation on the Server

There are a number of clients installed as part of the solution.

You are advised to install all clients on the server, although only DbScanner is designed to be used on a scan station PC, there is no harm in installing it.

1. Click Test to confirm V1 server name.
2. Confirm the location of the V1 Licences
3. Click the Check button and the licenses are interrogated, after a few seconds, a list of those available will be displayed
4. Tick the boxes next to those you wish to install on the server, un-tick those you do not wish to install at this time (you can reload the setup program in Client mode at any time to install more at a later date)
5. Select whether to include desktop shortcuts
6. Click Install when ready to install all clients selected.

*NOTE: If DbScanner is selected, you will also be asked if you wish to install Kofax. If you select Yes, then Kofax will be installed silently*

When completed, close the SunSetup program.

## 13. Post Install Tasks

### 13.1 Initialize DbArchive

#### 13.1.1 Using a tables.ini

1. Stop the DbArchive Services
2. Navigate to the C:\V1Home\DbArchive directory
3. Delete the \_TABLES.dat
4. Delete tables.ini
5. Delete \_tables.ini
6. Copy your tables.ini into the C:\V1Home\DbArchive directory
7. Open CMD prompt
8. Cd to the C:\V1Home\DbArchive

Enter:

```
DbCSArchiveServer.exe -debug 31417@any C:\V1Home\DbArchive\dbarchive.ini
```

9. Your tables will be built based on your tables.ini
10. Kill the cmd prompt
11. Start the DbArchive Services

#### 13.1.2 Using a tables.xml

1. On the V1 Server, open the DbLogin Admin Console and login as administrator / administrator
2. Click the DbArchive Table Editor
3. Click Import from XML
4. Browse to your tables.xml, click OK
5. After a short pause your tables will appear

### 13.2 Copy tasks dir

Copy the \Tasks\ subfolder of your Install files to the same sever location where \DbCapture\ subfolder was copied.

## 14. Post Install Checklist

Congratulations!

You have now completed the baseline installation and are advised to follow these final checks

- ▶ Check the services are started
  - ▶ Start any that have failed to start automatically. If DbCapture OCR Server service has not started then make sure \DbCapture\Profiles\DbCapture.DBCP file exists and try and start Service again.

Now the install has been completed, move on to the **Invoice Automation for Infor SunSystems - Server Implementation Guide**