V1
Document
Management

EDD for Sage X3

Electronic **D**ocument **D**elivery

EDM for Sage X3

Electronic **D**ocument **M**anagement

PIA for Sage X3

Purchase **I**nvoice **A**utomation

SOA for Sage X3

Sales **O**rder **A**utomation

Client Installation and Implementation Guide

Updated – 2nd September 2019

Contents

Introduction

This is a guide for installing and implementing the client programs necessary for day to day usage of EDM for Sage X3.

Assumptions:

- ▶ The Server installation has been fully completed
- ▶ The V1 server is named V1SERVER
- ▶ The EDM for Sage X3 distribution is shared on V1SERVER \\V1SERVER\EDMR13 which if browsed too using Windows File Explorer on the desired client shows the installation files:

autorun.inf
eula.txt
setup.exe
SkinSoft.VisualStyler.dll

Installation Procedure

1. On the client PC, browse to [\\V1SERVER\EDMR13](\\V1SERVER\EDMR13) in File Explorer
2. Right click on setup.exe and click **Run as administrator**
3. When prompted, select your language, click Next >
4. When prompted, select Client installation, click Next >
5. When prompted, enter the V1 Server DNS or IP address. In our *example* this is V1SERVER and click Test (change this value to the actual address of your server)

   This triggers a process to query the V1SERVER for the clients you are licensed for

6. Confirm the desired location of the clients

Patch 2 Onwards only

7. Tick the box whether http**s** is a requirement

Then:

8. Tick the boxes next to the clients you wish to install
9. Click Install
10. When completed, close the setup program

Consult the crib sheets on how to use the software or press F1 at any time which logged in to a client to view the help guides.

NOTE: The help guides are only in English.

Patch 2 Only - http/s Configuration

NOTE: This is only required on those clients using the following components:

- DbLogin Admin Console
- DbScanner
- DbCapture Admin Client
- DbCApture Client

Those users only using the SmartSuite, EDD or internal archiving directly from within Sage do no need to perform these steps.

There are 2 options to deploy http / https configuration on your client PC's.

1.1 Option 1 – Using the MSi

An MSi has been provided which when given the right switches, configures the client to communicate with the server components.

This can be ran manually on each machine, or as part of an AD deployment procedure in conjunction with ConfigHttpsSetup.Msi /q.

The MSi can be found in \\V1SERVER\EDMR13\DbCapture\ copied form and ran from any convenient location.

Switch	Information
http or https	This defines whether communication is via http or https
V1Directory	The location (in double quotes) of the route V1 Directory
NisURL	The location of NIS, e.g. https://MYSERVER:6181
ProxyURL	The location of the Proxy URL, e.g. https://MYSERVER:3001
DbLoginServer	The DNS of DbLogin
DbLoginServerPort	The port DbLogin is running on, this is usually 32000
TrustedCertificate	If your customer has a paid / trusted certificate set to true. Otherwise, set to False.

Here is an example of the command:

```
D:\PROJECTS\DMC-3408>ConfigHttpsSetup.msi /q HttpType="HTTPS" V1Directory="C:\Program Files (x86)\V1" NisURL="https://localhost:6181" ProxyURL="https://localhost:3001"
DbLoginServerName="localhost" DbLoginServerPort="32000" TrustedCertificate="false"
```

1.1   Option 2 – Using the command line utility

A simplified command line utility been provided which asks questions about the environment, the answers to which dictate the configuration applied to that client.

1. On the client PC, browse to [\\V1SERVER\EDMR13\utils\https](\\V1SERVER\EDMR13\utils\https) in File Explorer
2. Right click on ConfigHttps.exesetup.exe and click **Run as administrator**
3. Press 1 for http or 2 for https
4. Enter the route directory where the V1 Clients are installed, i.e. D:\EDM\Clients
5. Enter the NIS URL
6. Enter the DbLogin Server name (DNS or IP Address)
7. Enter the DbLogin Port (usually 32000)
8. Select the type of certificate present on the V1 server, 1 for self-signed, 2 for trusted
9. Press Enter to save the configuration and close the tool.

DbScanner Configuration

Assumptions:

▶ The Client installation procedure has been fully completed
▶ The Desktop shortcuts have been created

DbScanner is the only client which requires further configuration beyond the installation as it is tailored to the individual user's day to day requirements.

Follow these step by step actions.

The first time DbScanner is loaded, it attempts to create an acquisition component to allow the importing of files.

This is done in \Program Files for 32-bit clients or \Program Files (x86) for 64-bit clients, as such needs administrative privileges.

1. On your desktop, **right click and run as administrator** (you will only need to do this *the first time* you open DbScanner) from the DbScanner shortcut
2. When prompted, login as per your DbLogin Admin Console credentials as created by the system administrator (or use admin / admin if you are configuring global profiles)
3. You will see a popup stating 'Scan source has not been configured', this is normal, click OK
4. A Scan Source box appears, it gives you the option to either select a scanner found by the PC, or to have a source to import images. Make your selection, click OK.
5. The Acquisition Sources box should now appear displaying your source, click Close
6. You can now import the Scanner Profiles you wish to use on a day to day basis, whether that's barcode scanning for import in to EDM, or to export Invoices into PIA or Sales Orders in to SOA.

EDM

In this example, we will use Purchase Invoices, but the principal applies for all document types available.

The name can be anything meaningful, though it is advised to use the same name as the EDM table you wish to scan in to for consistency.

For our example, we will assume the Sage X3 Endpoint to be configured is SEED, change to match the actual name of your installation.

1. Log in to DbScanner as your configured user
2. Go to Configuration > Configure Scan Profiles > Add/Edit Local Scan Profile
3. Click Import
4. You should see the sample Global Profile for Purchase Invoices, click the [EDM] Purchase Invoices tick box and click OK
5. When asked if you wish to import it, click Yes
6. With [EDM] Purchase Invoice selected in the Scan Profile Management screen, click Edit
7. Click the Default Parameters Tab and confirm your source
8. Click the Destination Details Tab
9. If you are only using 1 Sage Endpoint, change the text in the first field to reflect SEED, if you're using multiple
    a. Change the Input type to DropDownList
    b. Click the […] button in the Default Value cell
    c. Add all the Sage Endpoints you wish to scan in to
    d. Set the most communally used one (if applicable) as default
10. Ensure the Default Value of Document Creator ##USER##
11. Ensure the Default Value of Submission Date ##DATE##
12. Ensure the tick box in the Invoice Number row for Use Document Header is ticked
13. Ensure the tick boxes in the Passed for Server Lookup column are ticked for:
    a. Sage Endpoint
    b. Invoice Number
    c. Document Creator
14. Click OK

See the EDM screenshot for an example of a finished configuration.

PIA

For our example, we will assume the Sage X3 Endpoint to be configured is **SEED**, change to match the actual name of your installation.

1. Log in to DbScanner as your configured user
2. Go to Configuration > Configure Scan Profiles > Add/Edit Local Scan Profile
3. Click Import
4. You should see the sample Global Profile for Purchase Invoices, click the [PIA] Express tick box and click OK
5. When asked if you wish to import it, click Yes
6. With [PIA] Express selected in the Scan Profile Management screen, click Edit
7. Click the Destination Details Tab
8. Ensure the DbCapture radio button is selected and [PIA] Express is in the drop down (change the value if not)
9. If you are only using 1 Sage Endpoint, change the text in the first field to reflect the name of it, if you're using multiple
   a. Change the Input type to DropDownList
   b. Click the […] button in the Default Value cell
   c. Add all the Sage Endpoints you wish to scan in to
   d. Set the most communally used one (if applicable) as default
10. Add the text SEED as a Default Value in the Sage Endpoint cell
11. Validate User
    a. Set the Default Value to ##USER##
12. Imported Document Identification
    a. Change the Input type to DropDownList
    b. Click the […] button in the Default Value cell
    c. Add INVOICE
    d. Add CREDIT
    e. Set Invoice as the default
13. Accounting Date
    a. Set the Default Value to ##DATE##
14. IMPORT_USER
    a. Set the Default Value to ##USER##
15. IMPORT_DATE
    a. Set the Default Value to ##DATE##
16. BATCH_ID
    a. Set the Default Value to ##BATCHNAME##
17. Tick Hide for all rows except:
    a. Sage Endpoint
    b. Site Code
       i. As above, populate this combo box with your most commonly used Site Codes

See the [PIA] Express screenshot for an example of a finished configuration.

SOA

For our example, we will assume the Sage X3 Endpoint to be configured is SEED, change to match the actual name of your installation.

1. Go to Configuration > Configure Scan Profiles > Add/Edit Local Scan Profile
2. Click Import
3. You should see a list of Global Profiles configured out the box, click the [SOA] Express tick box and click OK
4. When asked if you wish to import it, click Yes
5. With [SOA] Express selected in the Scan Profile Management screen, click Edit
6. Click the Destination Details Tab
7. From the Profile drop down, select SEED Sales Orders
8. Add the text SEED in the Sage X3 Folder / Endpoint cell
9. In the Grid Source cell:
   a. Change the Input type to DropDownList
   b. Click the […] button in the Default Value cell
   c. Add the following as options
      i. Last Order for Customer
      ii. Quote Number
      iii. Manually add Grid Content
10. User
   a. Set the Default Value to ##USER##
11. Date
   a. Set the Default Value to ##DATE##
12. Tick Hide for all rows except:
   a. Sage Endpoint
   b. Grid Source

See the SOA screenshot for an example of a finished configuration.

Example Screen Shots

EDM

PIA

Scan Profile Details

Profile Name [PIA] Express

Make One-Click toolbar

Default Parameters | Process Settings | Destination Details

○ DbArchive ● DbCapture ○ Indeterminate ○ DocumentSet

Profile [PIA] Express

Name	Input Type	Default Value	Batch Header	Document Header ☐	Disable On View Screen ☑	Hide	Data Propagation
Sage Endpoint	DropdownCombo	TEST	☐	☐	☐	☐	☐
Validate User	Text	##USER##	☐	☐	☐	☑	☐
Search Type	Text		☐	☐	☐	☑	☐
Supplier Lookup	Text		☐	☐	☐	☑	☐
Supplier Code	Text		☐	☐	☐	☑	☐
Supplier Name	Text		☐	☐	☐	☑	☐
Supplier Currency	Text		☐	☐	☐	☑	☐
Supplier Country	Text		☐	☐	☐	☑	☐
Supplier Address	Text		☐	☐	☐	☑	☐
Supplier Payment Terms	Text		☐	☐	☐	☑	☐
Purchase Order Number	Text		☐	☐	☐	☑	☐
Purchase Receipt Number	Text		☐	☐	☐	☑	☐
Packing Slip Number	Text		☐	☐	☐	☑	☐
Process Type	Text		☐	☐	☐	☑	☐
Captured Document Identification	Text		☐	☐	☐	☑	☐
Imported Document Identification	DropdownCombo	INVOICE	☐	☐	☐	☐	☐
Site Code Identifier	Text		☐	☐	☐	☑	☐
Site Code	Text		☐	☐	☐	☐	☐
Invoice Type	Text		☐	☐	☐	☑	☐
Control Account	Text		☐	☐	☐	☑	☐
Accouting Date	Date		☐	☐	☐	☑	☐
Document Source	Text		☐	☐	☐	☑	☐
Email From Address	Text		☐	☐	☐	☑	☐
Email Subject	Text		☐	☐	☐	☑	☐
Email Received	Text		☐	☐	☐	☑	☐
Supplier Document Reference	Text		☐	☐	☐	☑	☐
Supplier Document Date	Date		☐	☐	☐	☑	☐
Total Goods Value	Text		☐	☐	☐	☑	☐
Transport Charge	Text		☐	☐	☐	☑	☐
Discount	Text		☐	☐	☐	☑	☐
Total Net Value	Text		☐	☐	☐	☑	☐
Total Tax Value	Text		☐	☐	☐	☑	☐
Total Gross Value	Text		☐	☐	☐	☑	☐
Pay Approval	Text		☐	☐	☐	☑	☐
Comment	Text		☐	☐	☐	☑	☐
IMPORT_USER	Text	##USER##	☐	☐	☐	☑	☐
IMPORT_DATE	Text	##DATE##	☐	☐	☐	☑	☐
IMPORT_TIME	Text	##TIME##	☐	☐	☐	☑	☐
BATCH_ID	Text	##BATCHNAME	☐	☐	☐	☑	☐
DocGUID	Text		☐	☐	☐	☑	☐

OK   Cancel

SOA

Name	Input Type	Default Value	Batch Header	Document Header	Disable On View Screen	Hide	Data Propagation
Sage X3 Endpoint	Text	TEST	☐	☐	☐	☐	☐
Query Data	Text		☐	☐	☐	☑	☐
Customer Code	Text		☐	☐	☐	☑	☐
Customer Name	Text		☐	☐	☐	☑	☐
Customer Currency	Text		☐	☐	☐	☑	☐
Sales Site	Text		☐	☐	☐	☑	☐
Sales Type	Text		☐	☐	☐	☑	☐
Customer Order Reference	Text		☐	☐	☐	☑	☐
Order Date	Date		☐	☐	☐	☑	☐
Shipping Site	Text		☐	☐	☐	☑	☐
Payment Terms	Text		☐	☐	☐	☑	☐
Tax Rule	Text		☐	☐	☐	☑	☐
Sales Representative	Text		☐	☐	☐	☑	☐
Grid Source	DropdownCombo	Last Order for Customer	☐	☐	☐	☐	☐
Grid Source Number	Text		☐	☐	☐	☑	☐
Number Of Lines	Text		☐	☐	☐	☑	☐
Order Total	Text		☐	☐	☐	☑	☐
User	Text	##USER##	☐	☐	☐	☑	☐
Date	Date	##DATE##	☐	☐	☐	☑	☐
Send Acknowledgement	Text		☐	☐	☐	☑	☐
Acknowledgement Email	Text		☐	☐	☐	☑	☐
DocGUID	Text		☐	☐	☐	☑	☐

Scan Profile Details

Profile Name: [SOA] Express

☐ Make One-Click toolbar

Default Parameters | Process Settings | Destination Details

○ DbArchive ● DbCapture ○ Indeterminate ○ DocumentSet

Profile: [SOA] Express

OK | Cancel