



EDM for Sage X3

If we assume you have installed and implemented EDD and wish to *add* EDM functionality, or perhaps installed and implemented EDM and wish to *add* PIA, the following quick reference guide walks you through the process.

Do you have your new licences?

The setup program which installs / configures EDM for Sage X3 (R13) relies entirely on the licences.

Ensure you request your new licences via your Partner / Sage / V1 Account manager **before** you start.

For EDM, you need to have at least a dbarchive.key and the Smart*.cal files.

For PIA, in addition to those for EDM, you **also** need a dbcapture.key and an ABBYY licence.

Are you definitely adding to R13?

The setup program will **not** update you from a previous version of EDM, only add components to an **existing** EDM for Sage X3 (R13) installation.

If you're on R12 for instance, this system must first be updated to R13 before it can have components added.

This is usually a professional services engagement, contact your Partner / Sage / V1 Account manager for more information.

Good to go?

- On the server where EDM for Sage X3 was originally installed, re-run the setup program
- You'll be given several options, select 'Upgrade your system to add functionality or continue an un-finished install'
- If required, re-confirm the path to solution.xml
- Browse to the route of your **new** uncompressed licences
- The licences are read and compared against what is already installed. Where extra capability is found it's highlighted by a tick box next to the component
- Click Next
 - If adding EDM to EDD, follow the EDM chapter of the [Server Installation Guide](#)
 - If adding PIA to EDM, follow the PIA chapter of the [Server Installation Guide](#)
- When completed, close the setup program





Final Manual Step for EDM

Assumptions:

- The distribution containing the setup program and the installation files has been uncompressed to C:\EDMInstallFiles
- The installation has been installed to D:\Sage\EDM

Change the paths as applicable to your actual installation.

From the EDM for Sage X3 (R13) distribution, run the following MSI's in this order. Agree to the defaults, but make sure to install them all in the same directory.

- C:\EDMInstallFiles\SmartSuite\ArchJsonSetup.msi
- C:\EDMInstallFiles\SmartSuite\NISSetup.msi
- C:\EDMInstallFiles\SmartSuite\WebPortalSetup.msi

It's recommended you install them to a directory called D:\Sage\EDM\SmartSuite in amongst the existing EDM components.

You can now complete the installation by following the [Server Implementation](#) guide on the Portal as you would do for a fresh install.

