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

FilterMapMaintenance

Updated – 7th July 2020

Contents

Introduction

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

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

http://support.wearev1.com/software/x3/R13

Assumptions

▶ The EDM for Sage X3 solution is fully installed and implemented

▶ For the purposes of this document, we will assume C:\V1

   ▶ Change the path as appropriate to your installation when installing

▶ You have credentials for Syracuse

▶ You know the credentials for the EDM SQL database

▶ You have direct remote desktop access to the V1 Server

▶ You have access to the DbLogin Admin Console

▶ You have knowledge of Sage X3 Endpoints used by the customer

▶ Sqlcmd Utility tools are installed on the V1 Server

https://docs.microsoft.com/en-us/sql/tools/sqlcmd-utility?view=sql-server-ver15

DO NOT CONTINUE UNLESS THE ABOVE ASSUMPTIONS ARE SATISFIED

What is FilterMapMaintenance?

EDM for Sage X3 R12 introduced methodology whereby a single EDM database can hold images and data for multiple Sage X3 Endpoints simultaneously and be segregated by user who only see data they are assigned access too. R13 continued this same approach.
By access we mean the permission to deposit/retrieve images to and from EDM and use PIA.

The first field in all EDM database tables is the Sage X3 Endpoint.
The internal name for this field is DBA_FILTER_FIELD.

This corresponds to the DBA_FILTER_MAP system table in the EDM database which has 2 columns:

The UNAME is the DbLogin username
The KEYVALUE is the Sage X3 Endpoint they wish to have data access too.

To administrate this, the setup program is used to move users assigning them access.
It does this using a .NET SQL connection to the EDM database and simple UI.

In a single tenant environment or one where accessibility to the server is limited day to day, this may not be possible.

FilterMapMaintenance allows users and their access to be assigned automatically as a background process without the need for any user intervention.

You have 2 choices to do this depending on your requirements in the following chapters.

▶ Limit Access Using DbLogin Groups

    ▶ As its name suggests, a DbLogin Group is a way to group users together so they can be assigned roles / responsibilities. Using this choice FilterMapMaintenance requires DbLogin Group(s) to be created given the same name as the Sage X3 Endpoint(s) to which they relate.

    ▶ When DbLogin users are created and assigned access to this group, they are automatically given access to deposit / retrieve data from EDM and use PIA.

    ▶ Does not require connectivity to the Sage X3 Syracuse server.

▶ Giving Un-restricted Access

    ▶ If there is no requirement to limit specific users, DbLogin Groups are not used.

    ▶ As soon as a new DbLogin user is created, they are automatically given access to all available Sage X3 Endpoints.

    ▶ Does require connectivity to the Sage X3 Syracuse server.

Limit Access Using DbLogin Groups

▶ Assumptions:

Your Sage X3 installation has 3 Endpoints:

SEED
TEST
DEV

You have created 10 DbLogin users who wish to have access to the EDM / PIA Solution.

1. Open the **DbLogin Admin Console**
2. Log in as an administrative user
3. Click on the **Manage Groups** icon
4. Click on **Add**
5. Give your Group a name **the same as the Sage X3 Endpoint in uppercase**
6. You will be presented with the DbLogin users setup. Those in the left pane do not have access to the Group, those on right left do have access. Using the arrows, **move the users** according to the access required.
7. Click **OK**
8. Repeat the above for all the Groups you wish to create
9. When completed, click **Save**

Giving Un-restricted Access

No specific activity is required at this point, but be aware using this option will give all DbLogin users access to all data.

Download FilterMapMaintenance

Click [here](#) to download the files required for installing FilterMapMaintenance.

U: v1
P: software

Un-compress it to the C:\V1\utils directory so you end up with:

`C:\V1\utils\FilterMapMaintenance`

Which contains the files downloaded.

Install FilterMapMaintenance

1. Using file Explorer, navigate to C:\V1\utils\FilterMapMaintenance
2. Right click and **run as administrator** `!!FIRSTRUN.bat` which sets the paths in the files used to the current working directory
3. Right click and **run as administrator** `!Install_FilterMapMaintenance.bat`, this installs the service

Opens services.msc and check the service called "V1FilterMapMaintenance" is present.

NOTE: You are advised to have it 'log in as' an administrative user with service rights.

Configure FilterMapMaintenance

Now downloaded and installed, it must be configured as per the requirements of the Customer. A single script file handles this configuration, it will run self-contained and has no reliance on any other part of the system.

1. Using file Explorer, navigate to C:\V1\utils\FilterMapMaintenance
2. Using a suitable text editor, edit the `FilterMapMaintenance.ini`
3. Confirm the path for DbForm.exe and set the desired path for the log to be created
4. Save the file
5. Right click and **run as administrator** `!Install_FilterMapMaintenance.bat`, this installs the background service
6. Using a suitable text editor, edit the FilterMapMaintenance.def
7. Depending on your requirements discussed earlier in this document
   a. Set the `VARIABLE = USE_DBLOGIN_GROUPS,,"1"`
8. If set to 0
   a. Set the `VARIABLE = WEBADD,,`http://MCHDV05:8124/ to that of the Syracuse server
      NOTE: Ensure there is a trailing slash at the end of the URL
   b. Set the `VARIABLE = SYRACUSEUNAME,,"admin"`
   c. Set the `VARIABLE = SYRACUSEPWD,,"admin"`
      To their respective values
9. If set to 1
   a. No further action required
10. Other options that can be set
    a. Set he SENDUPDATEALERT,,"1"
       i. If set to 1
          1. Triggers an email to the UPDATEALERTEMAIL address informing them and displaying the changes made since the last time it was checked for changes
    b. Set the SCHEDULERESTAR,,"1"
       i. If set to 1
          1. Triggers the restart of a service / list of services based on the SERVICELIST and SCHEDULERESTARTIME values
11. Save and close the file.
12. Right click and **run as administrator** `!Start_FilterMapMaintenance.bat`, this starts the background service

FilterMapMaintenance setup is now completed.

Appendix

Logs

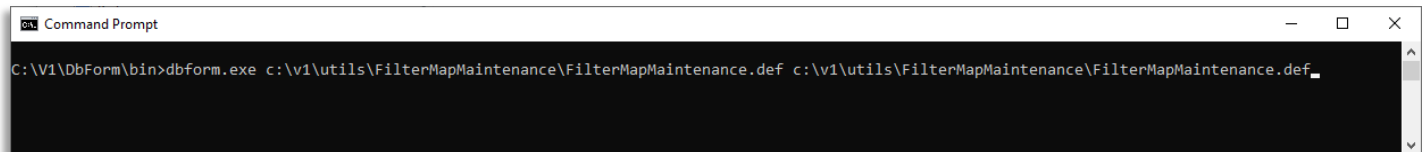All activity of FilterMapMaintenance is logged in a file here:

`C:\V1\logs\FilterMapMaintenance.log`

It is overwritten every-time the process is fired.

How to check if it's working

You can bypass the service tick frequency and run manually:

1. Open a cmd prompt as administrator
2. Cd to the C:\V1\Dbform\bin directory
3. Enter the following all on one line:

```
C:\V1\DbForm\bin>dbform.exe c:\v1\utils\FilterMapMaintenance\FilterMapMaintenance.def c:\v1\utils\FilterMapMaintenance\FilterMapMaintenance.def
```

4. Press Enter

You will see in the foreground of the cmd prompt all activity and it will run immediately.
Take note of the debug messages and check there are no errors or issues.
You should see evidence of SQL table updates based on your chosen configuration.

Change Frequency of update

The default time for an update to FilterMapMaintenance is 30 minutes.
If you wish to change this:

1. Open services.msc and stop the V1FilterMapMaintenance service
2. Using file Explorer, navigate to C:\V1\utils\FilterMapMaintenance
3. Using a suitable text editor, edit the FilterMapMaintenance.ini
4. Change the `cmd1-wait-time=1800` value to the desired frequency is seconds.
5. Save the file
6. Open services.msc and start the V1FilterMapMaintenance service