



V1 Document Management

EDD for Sage X3 by V1

Electronic Document Distribution

EDM for Sage X3 by V1

Electronic Document Management

PIA for Sage X3 by V1

Purchase Invoice Automation

SOA for Sage X3 by V1

Sales Order Automation

Platform Requirements

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Introduction

This document specifies the minimum platform requirements for a typical EDM for Sage X3 system.

- ▶ Stand-alone V1 Server
- ▶ Shared Sage X3 Application / Process Server
- ▶ Mail Server
- ▶ Fax Environment
- ▶ Scanner Hardware / Software Recommendations
- ▶ Barcode Printer

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

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

Environmental Pre-Requisites

V1 or Shared Sage X3 Application / Process Server

- ▶ The engineer has a good working knowledge of Windows and Sage X3 administration, setup and installation.
 - ▶ The location of the following functions
 - ▶ PATCH
 - ▶ GESAMK
 - ▶ GESAUS
- ▶ Knowledge of Windows Services, command line functionality and the registry
- ▶ A copy of EDM for Sage X3 distribution is accessible on a physical drive
- ▶ You have the licenses uncompressed and those are also located on a physical drive
- ▶ During the installation:
 - ▶ You will be prompted for email configuration, more details in the EDD chapter
 - ▶ You will be prompted for fax configuration, more details in the EDD chapter
 - ▶ You will be prompted for the printers to be used, more details in the EDD chapter
- ▶ You know the Endpoints(s) where EDD / EDM / PIA capability is to be applied
- ▶ Ensure **.NET 3.5 SP1** is installed on the installation server and client PC's
- ▶ Ensure you know the location of solution.xml file in the Sage X3 directory structure
- ▶ SOAP Web-services are fully functional
 - ▶ The Classic Pool configuration
 - ▶ Use a suitable tool such as SoapUI for testing
- ▶ During the installation:
 - ▶ You will be prompted for the authentication to access each of the Endpoints to be used, i.e. admin / admin. These credentials are encoded in the relevant configuration files automatically

Firewall

The following binaries must be added to a whitelist / Firewall exceptions / Windows smart screen:

EDD

DbForm.exe
DbLoginServer.exe
DbFaxd.exe
DbFaxSend.exe
DbMailSend.exe

EDM (those in EDD, in addition)

httpPost.exe
DbCSArchiveServer.exe
DbLUQuery.exe
DbCSQuery.exe
DbRemoteBlob.exe

PIA (those in EDD and EDM, in addition)

DbCapComms.exe
DbCapCommsUpdate.exe

Ensure the firewall on the V1 Server opens the following ports:

32000
31417
31418
31450
31451
31452
5002
6181
8444

Anti-Virus / Malware

Given the number of files generated as part of the EDM for Sage X3 solution, you are advised to add the V1 directory to a whitelist / exclusion area to prevent possible performance issues with real-time scanning.

EDM

The core of EDM includes the authentication module (DbLogin) and a repository (DbArchive) to store the scanned / imported images.

The **minimum high level** requirements for a server to run the core EDM components are:

Component	Specification
Operating Systems	Microsoft Windows Server 2008 R2 64 bit onwards
RAM	8 GB
Processor	Dual Core
Disk Space	10 gigabytes
LAN	Min 1GB LAN to clients

The **minimum** requirements for the Database Server to run the core EDM components are:

SQL Server	2008 R2 or higher
Oracle	Not supported

*Average image size is 60K – 100K per page: 20,000 pages per year = 2GIG of hard drive space.

For example, the installation program must be run on a Windows 2008 R2 > 2016 server, but the database server can be either of the following:

- SQL, on the same server as the V1 server
- SQL, on a different server to the V1 server

The minimum requirements for a **client** PC to run the core EDM Settings components are:

Component	Specification
Operating Systems	Windows 7 onwards 32 or 64 bit
RAM	4 gigabytes
Disk Space	5 gigabytes

PIA and SOA

The `core` PIA and SOA components include the authentication module (DbLogin), a file repository* (DbArchive) to store the scanned / imported images, an OCR module (ABBYY) and the services necessary to process images (DbCapture).

*The OCR process is very processor and memory intensive so if the minimum specification (or better) is not adhered to, the installation **will** experience performance and reliability problems.*

It can result in resource competition between Sage X3 and PIA.

The **minimum high level** requirements for a server to run the core PIA / SOA components are:

Component	Specification
Operating Systems	Microsoft Windows Server 2008 R2 64 bit onwards
RAM	16 GB
Processor	Quad Core @ 2.8Ghz
Disk Space	10 gigabytes
LAN	Min 1GB LAN to clients

The **minimum** requirements for the Database Server to run the core PIA components are:

SQL Server	2008 R2 or higher
Oracle	Not supported

*Average image size is 60K – 100K per page: 20,000 pages per year = 2GIG of hard drive space.

The minimum requirements for a **client** PC to run the core PIA components are:

Component	Specification
Operating Systems	Windows 7 onwards 32 or 64 bit
RAM	4 gigabytes
Disk Space	5 gigabytes

Email

Electronic Document Delivery (EDD) is the method by which outbound documents (such as Sales Invoices) are emailed either singularly or in batch directly from Sage.

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.

- ▶ You have details of the customer's mail server configuration
 - ▶ SMTP or hosted by Outlook365 / Gmail
 - ▶ Server address
 - ▶ Server authentication
 - ▶ Administrative email
 - ▶ This email address is one who will be informed of activities on the server, so the I.T department for instance.

In order to do this, a binary **dbmailsend.exe** must be allowed to *relay* through an existing mail server.

The minimum requirements for a server to allow mail relaying are:

Component	Specification
Mail Server	Supporting SMTP* delivery or MAPI Hosted Outlook 365 Hosted Gmail
Mail Client	Outlook 2003 Onwards

* Authenticated SMTP supported and configured during installation by clicking Advanced on the mail setup stage. See Installation document.

Fax

Electronic Document Delivery (EDD) is the method by which outbound documents (such as Sales Invoices) are faxed either singularly or in batch directly from Sage.

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.

- ▶ You have a modem installed and attached either to the Sage Application Server or the V1 Server you intend to install against or another machine that has TCP-IP connectivity to either.
- ▶ You have details of the customer's fax modem configuration
 - ▶ COM port

The minimum requirements for a server to allow fax relaying for EDM are:

Component	Specification
Analogue Phone Line	Accessible via the modem present on the V1 server to be used or a server connected to it visible via TCP-IP

Fax modem

To send faxes requires a fax class 2 modem.

Note that there is a difference between the class 2 and the class 2.0 – the class 2.0 is not supported.

Additionally, the US Robotics class 2 fax modem is not supported.

V1 specifically recommend and support the following hardware:

MultiModem® ZDX desktop (model no. MT5656ZDX) – details are available at http://www.multitech.co.uk/en_US/PRODUCTS/Families/MultiModemZDX/

This is a simple plug and play device and is available generally in the US, Canada and UK. It is also available and supported globally through a network of local distributors – find your local agent here: http://www.multitech.com/en_US/PRODUCTS/info/find_a_distributor/

Print

Electronic Document Delivery (EDD) is the method by which outbound documents (such as Sales Invoices) are printed either singularly or in batch directly from Sage.

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

You are advised to have at least one physical printer capable of printing A4/Letter documents from PDFs' configured and available for testing.

When shared, ensure the share name doesn't contain spaces.

These details include ensuring you have setup a user who has these printers shared against them. If this is not a requirement, this can be skipped during the install.

- ▶ Ensure the transactional printers and barcode printer(s) to be used are accessible and visible to the server you intend to install EDD / EDM. They must be accessible by the Windows user.

For example, when logged in to the server where EDD / EDM is installed, logging in with the Windows user and opening Windows File Explorer, entering \\PRINTSERVER\ shows the printer(s).

Scanning and Hardware

The recommendations to allow image processing for EDM are:

Component	Specification
Scanner	Kodak recommended*
Barcode Printing	Desktop or Network Connected Zebra GK 420d
Barcode Labels	Type A 55mm x 32mm If your transaction numbers are typically <= 13 characters Type C 89mm x 39mm If your transaction numbers are typically >= 13 characters
Scanning Image Format	B&W TIFF Grp IV 300dpi resolution or colour JPEG

*For more details on scanning requirements, please see the documentation on the portal under the section 'Documentation > Information & Requirements > Scan Station'.

Barcode Printer

Zebra GK 420d

Printer is connected to the network via a print server. Depending on the configuration, this must be accessible by a domain Windows user.

Transactional Printers

Printers must be 'PDF enabled', so assuming printing from the command line:

```
copy mypdf.pdf \\myprintserver\mysharedprinter
```

Produces the result:

```
1 file copied.
```

The PDF prints to the printer specified.

Sign Off

Representative	Date	Signature
V1 Project Manager		
Customer		
Sage Partner (if applicable)		