



V1
Document
Management

EDD for Sage X3

Electronic Document Delivery

EDM for Sage X3

Electronic Document Management

PIA for Sage X3

Purchase Invoice Automation

SOA for Sage X3

Sales Order Automation

Release Note – R13 Patch 1

Updated – 5th February 2019

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Introduction

This document provides high-level details of the incremental update of EDM for Sage X3 (R13) - Patch 1.

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

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

Thanks to the generous feedback from Sage, our partners and customers, the following chapters cover the high-level detail of each bug fix with our reference, so if you wish to discuss any of them any further, using this allows your V1 contact to quickly find and cover any questions you may have.

Given this is an incremental update, there is no requirement to re-install anything or make any complex changes, it is simply a series of small patches and file replacements to address all reported bugs since the initial release of R13.

Pre-Requisites

- EDM for Sage X3 (R13) must already be installed, implemented and tested on at least one test or production Sage Endpoint.

EDD - Electronic Document Distribution

Although only getting minor fixes, EDD remains a popular and valuable addition to the EDM for Sage X3 product suite.

Our Reference	Description
DMI-752	EDD now has a stripped down set of instructions for ease of deployment and a small patch with more samples to speed up delivery.
DMI-853	DATESTAMP random number generator removed in favour of multiple random numbers. R13 uses the date and time on the server to help make PDF files generated unique. If the operating server were configured to report the date as 'Tuesday 16 th September' this would invalidate the filename causing issues with the successful delivery of documents.
DMI-996	Documented instruction have been given on how to define temporary directory from where PDF files are picked up.
DMI-1055	Invoice print range now outputs the full range selected.
DMI-1059	Archive PDF and email can now be completed on an invoice range.
DMI-1071	Instances of incorrectly represented 'reply-to' email address have been resolved.
DMI-1075	Patch Program installer correctly updates EDDOUTMANAGEMENT.DEF.
DMI-1202	Outbound process now accepts CC or BCC only where no TOEMAIL address.

EDM - Electronic Document Management

The core of the solution, bug fixes are combined with usability and performance enhancements based on direct feedback from users.

Our Reference	Description
DMI-818	XV1BARCODE.adx was missing from the patches, now added.
DMI-829	Patch install notes provide improved guidance on start-up state of services to "Delayed Start".
DMI-737	If a document fails to archive using EDMImport, there is no indication to the user and the file is lost. Patch 1 adds multiple check mechanisms to ensure the DbArchive server is running and in a valid state. If not, the ITDEPT DbLogin user is informed via email of the issue and recommendations for resolution.
DMI-887	If rapidly clicking the [EDM] View Transaction link, it can cause SmartRetrieve to become un-responsive. The drilldown check has been overhauled to be more efficient and now uses the mask rather than the field to ensure capturing the transaction from the screen.
DMI-817	When first loading a transactional function, the drilldown was not properly passing the CCE value.
DMI-820	The drilldown check has been overhauled to be more efficient and now uses the mask rather than the field to ensure capturing the transaction from the screen.
DMI-719	The actions are missing when configuring drill downs. These are now added.
DMI-720	The Image Check code for the BIC, PAY and PQH Objects has been corrected.
DMI-990	Validation on file name length has been provided. It must be 30 in length or less for EDMImport
DMI-1002	The Crystal Report changes and crib sheet have been updated on the portal.
DMI-1003	A user crib sheet and video now exists for EDMImport.
DMI-1038	Print to Archive functionality has been reinstated. A How2Use video has been made available on the User Crib Sheets section of the Portal.
DMI-1079	A performance enhancement has been made to drilldowns using the mask and a global rather than lookup everytime
DMI-1070	File path correction made to Step By Step Installation Guide on the Portal.
DMI-1090	Enhanced screen shot added to Implementation Manual to show all supported tables, including BIS.
DMI-1097	Documentation provides better help to advise of configuration required should "File or Directory Does Not exist" message be displayed.
DMI-1134	Allows drilldowns to flip between standard SmartRetrieve prompting for u/p or using DbWebQ hybrid mode allowing a u/p to be passed in. NOTE: The latter has a dependency on the EDM User Profile being set for each Sage user.

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PIA - Purchase Invoice Automation

The biggest focus for improvement has been around PIA, Patch 1 has a significant number of fixes and minor enhancements to greatly improve the reliability and user experience.

Our Reference	Description
DMI-878	The SUPPLIER NAME BEGINNING search is no longer case sensitive
DMI-848	All XML soap lookups have a 2-stage check on file existence AND file size > 0 to protect against DbForm errors during validation. Every field now has its own status indicating any invalid response from Syracuse.
DMI-802	Sites imported from DbScanner or the PIAIMPORT directory are preserved when imported into DbCapture if templated
DMI-722	Linked to DMI-848, a check is only done if a timely response from the web-service is received validating the Site Code
DMI-876 DMI-907	As the use of the Site Code Identifier field is now mandatory for NONPOP Invoices, 2 extra fields have been added to the Site Identifier DbArchive table to enhance the auto detection and population of Site Codes
DMI-910	The Candidates.ini was misaligned compared to the PIA_Express.DBCP file. Not only corrected but also much more content added to increase likelihood of auto detected values.
DMI-980	Several web-services have been rationalized so only triggered if needed and where applicable, payload reused.
DMI-984	The ducs file was only allowing B&W documents be previewed in DbCapture. Full colour now activated allowing PDF / tiff or JPG preview and each archived in its native format.
DMI-981	Dimension types are pre-propagated for a BIS Invoice upload meaning provided the Account Structure is correctly configured, it will be 'ready to post' with no further user intervention.
DMI-906	A new field Imported Document Currency re-introduced and enhanced using regular expressions to auto identify from the document, when found it is compared against the supplier. All currencies are returned from Sage against which they are validated and the Rate passed / used by the BIS upload.
DMI-871	DOCGUID field is now read only.
DMI-988	Total Net renamed to Calculated Total Net and made read only so as to be indicative of source
DMI-730	Corrected declaration of the DBCS file when importing PDFs into PIA.
DMI-780	Receipt number and not order number is now returned to the grid if RECEIPTS is the match option.
DMI-801	A duplicate entry is now avoided when invoice fails and then reprocessed.
DMI-877	Fix to "Accounting" incorrectly spelt as "Accouting" in PIA Express Profile
DMI-879	XML payload now fixed when creating accounts.
DMI-902	Fix to XV1GDALU missing XV1APAPIA.
DMI-991	Currency code descriptions no longer displayed.
DMI-992	Now able to change currency when multiple currencies found, extra field added to prevent every document needing validation
DMI-994	Document source and email detail fields are now hidden by default. They can be viewed by toggling Ctrl+H.
DMI-999	X3 invoice type field now changes automatically when a credit is identified if changed from an Invoice
DMI-721	The list of site codes were not properly returned if PIA has not yet identified the document.
DMI-1046	Document validation error now presented to the user, where line quantity to invoice of zero is entered.
DMI-1048	Field validation error now presented to user on Total Goods Value and Calculated Net Value, where value is blank or zero.

DMI-1050	Instances of PDF being moved to "To be checked" folder in DbCapture, instead of configured Seed folder have been corrected.
DMI-1051	Value totals data location now set to 'Last page' in Profile.
DMI-1053	Instances of "DbForm Script Failed" exception being returned, instead of moving document to hold/failed queue, has been resolved.
DMI-1056	Transaction grid line is now cleared when changing supplier and the supplier does not have the selected order.
DMI-1062	Handling of "Accounts Code Containing" search has been improved where the search included "0".
DMI-1081	Document validation error is now returned where "Supplier document date" is empty, instead of setting it to today's date.
DMI-1083	Duplicate invoice check has been improved to consider Site as well as Supplier Document Reference.
DMI-1085	Handling of captured minus signs has been improved to allow export.
DMI-1086	Better display of Total Goods Value to allow Field Validation Error to be presented to user where it is zero or blank.
DMI-1088	Documents viewed from Exported queue will remain there, and not be moved to 'To be checked'.
DMI-1089	Automatic clearance of Exported documents improved. They are now removed on successful export and only on the number of configured days <i>after</i> it was exported, and not the number of days after it was added to the queue.
DMI-1094	Site Code dropdown box can now be selected on NONPOP – even after initial selection.
DMI-1095	Improved error message displayed and warning when Tax Value is blank or zero.
DMI-1099	Supplier Document Date now appears in BIS export XML.
DMI-1103	Improved validation where Supplier Document Date is empty
DMI-1108	Improved process where the Supplier Document Date is in the future. The user can put on hold using the 'Future dated' on hold reason. Once the date has arrived, the user will receive an email advising the document can now be processed.
DMI-1113	Better handling of inactive suppliers in DbCapture. The user will be notified on screen and the upload will not complete.