



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 2

Updated –19th July 2019

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Introduction

This document provides high-level details of the incremental update of EDM for Sage X3 (R13) - Patch 2.

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

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

Pre-Requisites

EDM for Sage X3 (R13 Patch 1) must already be installed, implemented and tested on at least one test or production Sage Endpoint.

Release scope summary

R13.2 includes the following, explained in further detail throughout the remainder of this document:

- ▶ Support for V1 Document Management release 4.6
- ▶ Licensing Changes
- ▶ Extended Support for Internal Archiving
- ▶ Change references from “Enterprise Management”
- ▶ Software improvements

Support for V1 Document Management release 4.6

V1 EDM for Sage X3 release R13.2 integrates with the latest release of V1 Document Management: release 4.6, thus providing:

- ▶ Access to the new V1 license server, changing the way ABBYY licenses are accommodated in V1. This allows PIA implementations on Amazon Web Services or Microsoft Azure platforms to be supported.
- ▶ Outbound emails can now be sent using SmartMail, the default email solution for V1. Configuration allows DbMail to continue to be used.

Licensing Changes

To improve security and prevent exploitation of the software, DbCapture, SmartMail and the FTS capability of DbArchive now require dedicated licenses generated by the V1 License server, which will be sent along with the other licenses currently, used (cal / key respectively).

Each server being installed will need its own licenses generated, and they are tied to that server.

5bbedc7ead89d73b20197cf6.json	Required to activate DbCapture against the Licensing server
5bbedc8dad89d73b20197cf8.json	Required to activate SmartMail.Send against the Licensing server*
5bbedc87ad89d73b20197cf7.json	Required to activate FTS against the Licensing server**

*Note this is only required if you're using SmartMail.Send to distribute emails. If DbMail is being used, it's not required.

**Note this is only required if you're using FTS. If it's not being used, it's not required.

Extended Support for Internal Archiving

V1 EDM for Sage X3 release R13.2 provides support for instances where it is not practical or permitted to install V1 EDM for Sage X3 on the same single tenant hosted environment as Sage X3 itself (for instance where Sage X3 is hosted on a Linux server).

- ▶ The Db applications for V1 Document Management release 4.6, which are referenced by V1 EDM for Sage X3, support both HTTP and HTTPS connections.
- ▶ A configured parameter has been added to set the V1 Archiving method: the existing to disk method or from email. Email uses the same email settings as Sage's workflow, and the image is emailed to dedicated mailboxes. Using SmartMail, the mailbox is polled periodically. When an attachment is found, it is downloaded to disk and archived.
- ▶ Introducing an email method also gives users an 'email to archive' functionality from within Sage X3, in addition to scanning and on disk import.

Change references from “Enterprise Management”

Sage are transitioning the “Enterprise Management” product name back to “X3”.
References in our integration, portal and documentation to “Enterprise Management” have been updated to “Sage X3”.

Software improvements

V1 EDM for Sage X3 release R13.2 also includes the below improvements.

Reference	Improvement
DMI-1072	EDD attachment names have been made more meaningful – giving reference to the transaction number.
DMI-1218	DbCapture. A message is now displayed if a site code is invalid. The Site code identifier can be modified once cleared.
DMI-1221	Account structure errors are no longer displayed for PIH POP invoices.
DMI-1579	When an email is sent to notify of failure with Syracuse or archiving, it now includes a link to troubleshooting section of Portal to aid resolution.
DMI-1626	Job activity in EDD and log files now go into separate directories to make it easier to find information.
DMI-1678	Fix to archiving not occurring when Print destination is used.
DMI-1679	Fix to EDD failure to processing more than one PDF each time EDD Outbound Management Service is fired.
DMI-1770	Fix to EDD where no output was being produced when printing a range of documents.
DMI-1092	Fix to PIA to allow more applications to be added to new users and to update scanner settings.
DMI-1921	Parameter added to internal archiving to configure the maximum size of a permitted attachment.
DMI-1977	The introduction of SmartMail for outbound email removes instances of trailing blanks in the email header, which had previously given instances of outbound emails arriving in Spam filter folders.
DMI-1962	Fix to PIA if a packing slip number is found to return the receipt number, it will return the lines without having to click Check again.
DMI-1990	Fix to invoice creation from receipt lines.
DMI-1991	Improved handling of special characters in description columns of DbCapture grid.
DMI-1992	Resolved handling of GRID_ORDER_NUMBER_CHOICE configuration setting so to correctly return DbCapture grid lines based on whether set to "ORDERS" or "RECEIPTS".
DMI-1993	Message will be returned when a site code, which does not exist, is keyed into DbCapture.
DMI-1997	Error message improved were email address in V1 does not match the email address in X3. This will allow processing of the queue to continue as expected.