



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 3

Updated –05th August 2020

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Introduction

This document provides high-level details of the incremental update of EDM for Sage X3 (R13) - Patch 3.

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

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

Release scope summary

R13.3 includes the following, which are explained in further detail throughout the remainder of this document:

- ▶ Support for V1 Document Management release 4.7.
- ▶ Support for X3 12.0.22 and X3 V11.
- ▶ French language support for messages and error messages.
- ▶ French language support for user interface.
- ▶ Maintenance improvements.

Please refer to the later section for 'Known limitations'.

Support for V1 Document Management release 4.7

EDM for Sage X3 release R13.3 integrates with the latest release of V1 Document Management: Release 4.7, thus providing:

- ▶ Template improvements, where changes made to templates by lassoing can be saved.
- ▶ Improved VAT number recognition for Ireland, Portugal, Sweden and Luxembourg.
- ▶ The option to reprocess document as image, which can bring improvement to character read.
- ▶ Connection stability improvements for larger customers.

Translations

EDM for Sage X3 R13.2 included a new module to allow the SmartSuite to be translated. EDM for Sage X3 R13.3 extends on this, allowing translation capability of the following text across the solution:

- ▶ The SmartSuite UI
- ▶ DbArchive table display names and messages
- ▶ PIA DbCapture profile display names and messages
- ▶ Sage X3 add-on link text and messages
- ▶ Text in emails sent by EDM for Sage X3 R13.3.

The up-shot of this is all visible text when using EDM for Sage X3 can be displayed in the language of your DbLogin user and changes interactively if altered.

English and French language deployment files are provided with R13.3.

Examples:

- ▶ I have a DbLogin user PETE who logs in to the SmartSuite.
- ▶ During setup, his language was set as English.
- ▶ He uses SmartDeposit to deposit ad hoc images and PIA to create Purchase Invoices, all messages he sees are in English.

- ▶ I have a DbLogin user PIERRE who logs in to the *same system*.
- ▶ During setup, his language was set as French.
- ▶ He uses SmartDeposit to deposit ad hoc images and PIA to create Purchase Invoices, all messages he sees are in French.

- ▶ I have a DbLogin user SANDRA who logs in to the *same system*.
- ▶ During setup, her language was set as English.
- ▶ She uses the add-on within Sage X3 to deposit ad hoc images and decides to change her language to French in the UI. In doing so, the links are then shown in French as are all messages returned.

SmartConnect

EDM for Sage X3 R13.3 introduces a new V1 authored component: SmartConnect. SmartConnect is a .NET Core binary for communicating with internal and external sources. Its main purpose in R13.3 is retrieving translations from the SmartSuite translation Engine.

Vault

EDM for Sage X3 R13.3 deployment introduces a new component: Vault. [Vault](#) is a widely recognized Cloud based security mechanism to store sensitive information, such as usernames, passwords and server names.

EDM for Sage X3 R13.3 onwards removes all references to sensitive information from scripting and settings files and instead securely stores them in the Vault.

These details are then only retrieved 'on demand' and protected during the day-to-day usage of the solution.

Maintenance improvements

V1 EDM for Sage X3 release R13.3 also includes the below improvements.

PIA

Reference	Problem Summary	Solution
DMI-1093	A user may wish to process a non-POP transaction where the Site Code Identifier field is blank, but is unable to.	A new configurable parameter – SITECODEIDENTSEVERITY – can be configured to determine whether a blank Site Code Identifier field will be handled as an error, warning or information. This parameter is default to 2 ('error'). Setting the parameter to 0 (information) or 1 (warning) will allow the user to process a non-POP transaction irrespective of whether the Site Code Identifier field is blank or not.
DMI-1220	The user is able to select a currency different to that of the purchase order they wish to process. A warning is displayed and the user is allowed to incorrectly create the invoice from the purchase order.	An error will be displayed instead of warning, stopping the PO from being processed.
DMI-2031	An X3 supplier's address field is not returned in DbCapture where an address field has an invalid XML character (such as "&") in it.	Supplier address field with invalid XML characters will be returned to DbCapture.
DMI-2303	Errors/warnings may be displayed on some non-mandatory fields, which incorrectly stops processing.	No errors or warnings will be applied on the below fields. They will also be hidden from the profile to improve screen real estate : <ul style="list-style-type: none"> ▶ Supplier address ▶ Supplier Country ▶ Payment terms ▶ Document Source ▶ Pay approval ▶ Validate user ▶ Calculated Net Value

DMI-2304	An invalid site code can be manually entered without notification.	Failed validation of site code will be displayed as an error.
DMI-2623	The configured list of currencies available may not reflect those in X3.	A new configurable parameter – ADVANCEDCURRENCYCHECK – can be configured to determine whether the list of currencies available comes from Sage X3 or the existing configured list of currencies. This parameter is default to 1 (use existing configured list).
DMI-2435	A user may wish to process where the sum of line values does not match the header value, but is currently unable to.	A new configurable parameter – SUMOFLINESSEVERITY – can be configured to determine that where the sum of line values does not match the header value, it will be displayed as an error or a warning. When configured as the latter, the user will be able to process the transaction.
DMI-2311	An option to select either BIS DIRECT or PIH DIRECT is not presented. It is configurable to have only one or the other.	<p>The following process type options will be available for non-POP:</p> <p>BIS DIRECT</p> <p>PIH DIRECT</p> <p>PIH POP</p> <p>Along with configurable options to:</p> <ul style="list-style-type: none"> ▶ Default which process type will be displayed where there is no purchase order reference. ▶ Alternatively, whether to follow an automated logic to default the document type. <p>See the section “DMI-2311 Set invoice type logic” in the Appendix at the end of this document for an explanation of this logic.</p>
DMI-2370	A user is able to key Unit Price into grid to allow validation to pass, but the keyed value is not passed through to X3.	Keyed unit price is passed through to transaction created in X3 on POP processing.

DMI-2247	A user is unable to put a document on hold where the supplier is not available in X3.	Able to put document on hold if supplier not set.
DMI-2464	The error message where 'pool alias not responding' does not provide information on the web service that failed, making troubleshooting difficult and potentially increasing downtime.	Error message to include the X3 web service name.
DMI-2547/50	EDM import failing on BIC, BPS, BIS, GAS and REL objects.	EDM import should not fail on these objects.
DMI-3084	Automated purchase order number recognition does not exist where the document is not templated.	On DbCapture screen load, regular expressions are used to search the OCR data for a potential purchase order number from the document based on the order number reference's expected prefix and length identified from the corresponding Sage X3 endpoint. If a potential purchase order number is identified it is read against Sage X3 data. If a match is found and the matched purchase order in X3 has lines, then the matching purchase order number, supplier, site code, invoice type and lines are returned to DbCapture without a need for further user input.
DMI-3137	The captured VAT header value is not passed through by DbCapture when it instructs a purchase invoice to be created in X3.	New configurable parameters – PASSPIHPOPTAX and PASSPIHDIRECTTAX – can be configured to determine whether, for PIH POP and PIH Direct process types, to pass the captured VAT header value through to X3 or not (set to 1 or 0 respectively).

EDD

DMI-2386	The system may halt when processing an empty PDF file.	The PDF file will be moved to failed directory if it is less than 5KB in size, as this typically suggests the file is incomplete.
DMI-2438	When a further set of print jobs are executed whilst a previously submitted print run is still being processed, the remaining print jobs in the original run may fail.	The INI file corresponding to the PDF file is now also moved to the 'processed' directory, instead of being deleted. Print jobs should now longer fail because of this.
DMI-2440	A print run fails if the PDF file does not contain the 5th element, which should contain username, because user printer lookup cannot be completed.	Print output will be to the system default printer if the PDF file does not include the fifth element in its file name.
DMI-2487	If printer not found because lookup from user did not find printer then print run fails.	If the user's default printer cannot be found then output will now be sent to the system default printer.
DMI-2488	Print job creation does not complete if PDF splitting fails as no tag file is created.	If PDF splitting fails then the documents which failed are sent to the !FAILED directory.

DMI-2498	A user does not receive notification when EDD outbound jobs fail.	<p>An email is sent notifying of EDD outbound job failures, with configuration to control whether failed jobs are attached to the email.</p> <p>It can be configured which DbLogin user(s) the email will be sent to.</p> <p>It can also be configured how those recipients will be notified in the email which outbound documents failed:</p> <ul style="list-style-type: none"> ▶ Show a list on the email of which document files failed. ▶ Attach to the email the failed documents zipped. ▶ Alternatively, both a list of files and attached to the email. <p>A further configuration can set the maximum file size to be attached to the email. Where this would be exceeded, the failed document files would not be attached to the email and the recipient would receive in the email just the list of files that failed in.</p>
DMI-2439	Print destination logic may be mixed up during large print runs leading to invalid printing.	The print destination logic is retained better on large print runs.
DMI-2822	Unnecessarily retaining previously processed files could slow down document processing as well as taking up disk space.	New configurable parameter - CLEANUPROCESSED - can be configured to determine whether EDD outbound management will also periodically clean out files. The directory to be cleaned, the age of files to be cleaned and where the files will be moved to can also be configured.

EDM

DMI-2220	Instances reported where not all pages of a multi-page document were being archived.	All pages should be archived.
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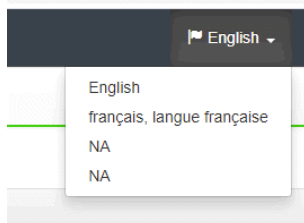
General

DMI-2595	Improve the storage of X3 and V1 system user names.	Encryption and store of X3 and V1 system user names improved.
DMI-1248	Using the Master Connector to upgrade to EDM does not install core SmartSuite if EDD is already installed.	SmartSuite is installed when upgrading.
DMI-2106	Master Connector could not be used to configure configuration between HTTP and HTTPS.	Able to configure HTTP or HTTPS protocol using the Master Connector.
DMI-3122	User may unnecessarily be prompted to restart their system during upgrading using the Patch Program.	Message is suppressed by the Patch Program stopping the corresponding service before it runs the msi that led to the restart message being displayed.
DMI-3125	"Another version of this product is already installed" message may unnecessarily appear during upgrade using the Patch Program.	Message better handled and suppressed.
DMI-3127	Attempt to upgrade using the Patch Program may fail where previously version was manually installed.	Additional method introduced to establish whether previous version had been installed, irrespective of whether it was done manually or using Patch Program or Master Connector.

Known limitations

Translations

- ▶ Field and table translation within DbScanner module has not been provided.
- ▶ Users do not have an interface within which to make their own modification to the translation of a phrase relating to our V1 integration with X3. Modifications and additions to such can be performed by the user via a Text Editor.
- ▶ The installers for R13.3 are in English language only.
- ▶ Language pack support 'out-of-the-box' for other than English or French. English is shown for integration phrases where a user selects a language other than English or French in the SmartSuite or DbCapture.
- ▶ French language support throughout the remainder of DbClient functionality and modules continues to be as provided by fixed translations in the Db Core V1 software. These are hard coded and cannot be modified.
- ▶ The V1 Translations Manager allows users to define additional languages and presents users with opportunities to select which language they wish to display. An option to select only 'French' cannot be forced.
- ▶ Db Core V1 software presents users with opportunities to select which language they wish to display. An option to select only 'French', or to align to SmartSuite setting, cannot be forced.
- ▶ The language displayed by our X3 add-on cannot be forced to align itself with language selected in SmartSuite or DbClient.
- ▶ Thereby a user wishing to view French throughout X3, V1 and our integration will need to select 'French' option in three places: SmartSuite Translations Manager, Db Core and X3.
- ▶ Changes to the user language in DbLogin may not be reflected in SmartSuite so messages in SmartSuite may appear in mixed languages until the user selects the language in SmartSuite dropdown again. For example:
 - ▶ Users selects language to French in SmartSuite. Messages shown in French.
 - ▶ User closes SmartSuite.
 - ▶ In DbLogin user sets language to English.
 - ▶ When user reopens SmartSuite a message header may show in French, but the body in English.
 - ▶ If the user changes SmartSuite language to English and then back to French, the messages will be corrected.
- ▶ SmartSuite language drop down shows entries listed as "NA". These options can be ignored and have no functionality. They are a known limitation with how integration translations interact with the Core translation engine in this release.



Master Connector

- ▶ It is assumed X3 and V1 protocol are both configured as HTTP or HTTPS. If V1 is to be configured HTTPS, but X3 as HTTP (or vice versa), X3 protocol will need to be manually configured back to HTTP after running the Master Connector.

Appendix

DMI-2311 Process Type Logic

