



## 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

## Server Administration

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## Contents

1.	Introduction .....	3
2.	EDD - Applying Additional Fax Lines .....	4
3.	EDD - Setting Up a Fax Modem on a Remote Server .....	6
4.	EDM - How to Remove Archived Entries from EDM .....	8
5.	EDM - Clearing a Table of Entries .....	9
6.	EDM - How to change tag information in EDM .....	10
7.	EDM - How to Add Support for Additional File Types.....	11
8.	EDM – None standard Drilldown, Archive and Print Barcode Links .....	12
9.	EDM - SmartSuite – Manually altering settings post-install .....	15
10.	PIA - How to manually activate the ABBYY license.....	16
11.	PIA - How to manually deactivate / move the ABBYY license.....	17
12.	EDM - PIA - How to manually change the values in Vault .....	18

# 1. Introduction

Intended for experienced Trained Partners / Customer, Sage X3 and V1 engineers only, this is a guide for administrative tasks that are not typically done as part of a standard implementation, but may be required after a given period of time once users begin to use it.

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

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

## 2. EDD - Applying Additional Fax Lines

On the V1 Server stop the 'DbFax: Communication' and 'DbFax Scheduler' services.

NOTE: When you receive your new licence files, copy and replace the DbFax.exe and DbFaxdD.exe files that are currently in the c:\v1\dbfax\bin folder

Open the c:\v1\dbfax\bin\dbmodem.ini file in notepad

We will assume that the default file is in place which should look like this:

```
device=FaxModem1

    port = com1

    type = MultiTech

    status = enabled

    group = default

    prefix = 9

# Comment the above line with a hash (#) if no prefix required

modem=MultiTech

    init = ATZ`2AT&F&K4&DM0X4V1Q0E1S0=0S12=255`2AT+FCLASS=2`2AT S7=55`2*AT`=2

    reset = AT&FE1&E5QV1S2=43\r

modem=Pace

    init = ATZ`2AT &F &K4 &D M0 X4 V1 Q0 E1 S0=0 S2=255 S12=255 +FCLASS=2`2AT S7=120`2*AT`=2

    reset = AT&FE1&K4QV1\r
```

You will notice there is only one entry for a 'device'. This corresponds to the physical modem. If we assume two additional modem licences have been purchased and they are on com2 and com3 respectively, reflect the below:

```
device=FaxModem1

    port = com1

    type = MultiTech

    status = enabled

    group = default

    prefix = 9

device=FaxModem2
```

```

    port = com2

    type = MultiTech

    status = enabled

    group = default

    prefix = 9

device=FaxModem3

    port = com3

    type = MultiTech

    status = enabled

    group = default

    prefix = 9

# Comment the above line with a hash (#) if no prefix required

modem=MultiTech

    init = ATZ`2AT&F&K4&DM0X4V1Q0E1S0=0S12=255`2AT+FCLASS=2`2AT S7=55`2*AT`=2

    reset = AT&FE1&E5QV1S2=43\r

modem=Pace

    init = ATZ`2AT &F &K4 &D M0 X4 V1 Q0 E1 S0=0 S2=255 S12=255 +FCLASS=2`2AT S7=120`2*AT`=2

    reset = AT&FE1&K4QV1\r

```

Save the file.

Go to Start > Run > type: cmd press enter.

CD the c:\v1\dbfax\bin folder

Type: dbmodem.exe and press enter to recompile the system configuration to accommodate the two new modems.

You should see your new fax licences being applied

Finally, restart both the 'DbFax: Communication' and 'DbFax Scheduler' services.

Your new modems are ready to use. If you have 4/5/6 etc modems, repeat the above adding the additional modem locations sequentially.

### 3. EDD - Setting Up a Fax Modem on a Remote Server

It is highly recommended that your modem is attached to your V1 Server. If it is not then it must be on a server which is accessible to the V1 Server via TCP-IP. In this case further configuration is required. Follow these steps to enable the functionality:

#### Assumptions:

- ▶ The remote server is called REMOTESERVER123.
- ▶ The Modem on REMOTESERVER123 is on COM1

Attach the modem on the back of REMOTESERVER123, deactivate the windows driver and take note of the COM port.

Copy the DbComms (\DbFax Files\DbFax\DbComms) folder from the R13 distribution to c:\v1\DbComms on REMOTESERVER123.

Edit C:\v1\dbcomms\dbmodem.ini to point to the correct COM Port and the prefix if you need an outside line as below:

```
device=FaxModem
port   = com1
type   = multitech
status = enabled
group  = default
prefix = 9
```

Ensure the environment variables DBfax and DBfax\_SPOOL are set correctly

- ▶ DBfax=c:\v1\dbcomms\
- ▶ DBfax\_SPOOL=c:\v1\dbcomms\spool\

Open a cmd prompt and Run C:\v1\dbcomms\dbmodem.exe

Open a cmd prompt and enter: **C:\v1\dbcomms\dbcscommsserver -install**

**"DbCSCComms Server" 31419@any c:\v1\dbcomms** which installs the service.

Start the DbCSCComms Server service

**On the APPS server**, edit c:\v1\dbfax\dbmodem.ini device section to reflect below:

```
device=FaxModem
remote = REMOTESERVER123
port   = 31419
status = enabled
group  = default
```

```
modem=MultiTech
```

```
init = ATZ`2AT &F &E5 &D X4 V1M0Q0 E1 S0=0 S12=255 +FCLASS=2`2AT S7=55`2*AT`=2
```

```
reset = AT&FE1&E5QV1S2=43\r
```

```
modem=Pace
```

```
init = ATZ`2AT &F &K4 &D M0 X4 V1 Q0 E1 S0=0 S2=255 S12=255 +FCLASS=2`2AT S7=120`2*AT`=2
```

```
reset = AT&FE1&K4QV1\r
```

Make sure that 'device=' matches the one on REMOTESERVER123 in

C:\v1\DbComms\dbmodem.ini

Open a cmd prompt, CD to C:\v1\dbcomms\bin

Type: dbmodem.exe and press enter

Your changes are re compiled

Finally, start the **DbCSCComms Server** service.

This completes the procedure.

When you send a fax using the EDDOUTBOUNDMANAGEMENT dir and a fax number is found, it will now be processed by the V1 Server but sent by REMOTESERVER123.

## 4. EDM - How to Remove Archived Entries from EDM

### Individual entries

Assumptions:

- ▶ The installation has been applied to D:\SAGE\V1 on the V1SERVER
- ▶ The entry you wish to remove is in the SEED Endpoint
- ▶ The user who archived the entry in error is PETE

**IT IS NOT POSSIBLE TO UNDO THESE ACTIONS, PROCEED WITH CAUTION. ENGINEERS WHO UNDERTAKE THESE INSTRUCTIONS DO SO AT THEIR OWN RISK. SAGE / V1 TAKES NO RESPONSIBILITY FOR ACCIDENTAL LOSS OF DATA.**

Example: The customer has archived Sales Invoice SIN0911F2200001 in the EDM system in error and wants to remove it.

1. Log in to the V1SERVER as an administrative user
2. Open a CMD prompt as administrator
3. CD to the D:\SAGE\V1\DbArchive
4. Enter the following command on the command line in one line:

```
DbCSQuery.exe -s 127.0.0.1 -o 31417 -u administrator -p administrator -d V1X3_V1SIH -f INV_NO -c EQ -v SIN0911F2200001 -f DBA_FILTER_FIELD -c EQ -v PETE
```

5. Press Enter.
6. This should display the row containing the tag information relating to the offending image. Ensure it is the actual entry. To now physically remove the entry, enter the following command on the command line on one line:

```
DbCSQuery.exe -s 127.0.0.1 -o 31417 -u administrator -p administrator -d V1X3_V1SIH -f INV_NO -c EQ -v SIN0911F2200001 -f DBA_FILTER_FIELD -c EQ -v PETE -x
```

7. Press Enter
8. This command should return 1 row deleted. The image is now removed from the EDM archive.
9. Restart the DbArchive: Query service to re synchronize the services.

Repeat the above command replacing the values in red with those of different **tables**, **field names** and **values** depending on the requirement. The DbCSQuery.exe binary allows command line interrogation of the repository, adding a **-x** parameter removes the entry queried.





## 5. EDM - Clearing a Table of Entries

### Assumptions:

- ▶ The installation has been applied to D:\SAGE\V1
- ▶ You have prior knowledge of the tables to be cleared of data

**IT IS NOT POSSIBLE TO UNDO THESE ACTIONS, PROCEED WITH CAUTION. ENGINEERS WHO UNDERTAKE THESE INSTRUCTIONS DO SO AT THEIR OWN RISK. SAGE / V1 TAKES NO RESPONSIBILITY FOR ACCIDENTAL LOSS OF DATA.**

Example: The customer has moved from Test to Live and wants to clear the EDM archive file repository of images.

1. Load the DbLogin Admin Console and login as administrator / administrator.
2. Click the  icon at the top of the screen which is the DbArchive Import / Export tool
3. Select the table that wish to remove all entries from
4. Click the  icon at the top of the screen
5. You will be asked to confirm you wish to clear the table, click Yes.
6. Close the DbLogin Admin Client
7. Open services.msc
8. Restart both the 'DbArchive: Write' and 'DbArchive: Query' services

The table(s) selected are now cleared of all data.

## 6. EDM - How to change tag information in EDM

Assumptions:

- ▶ The server installation and implementation has been completed in full
- ▶ The client installation has been completed and at least the DbArchive Failed Entry Manager is installed on the client who wishes to change a tag

**PROCEED WITH CAUTION.  
ENGINEERS WHO UNDERTAKE THESE INSTRUCTIONS DO SO AT THEIR OWN RISK.  
SAGE / V1 TAKES NO RESPONSIBILITY FOR ACCIDENTAL CHANGES TO DATA.**

Example:

The customer archived a Purchase Invoice PIN0911F2200001 in the SEED Sage Endpoint and the Supplier Invoice number has changed since it was archived 3 months prior.

*NOTE: You are not advised to ever change the first or second field data in a transactional EDM table, those that beginning with [ ] (Sage Endpoint and transaction number respectively) as this will compromise drilldown functionality.*

Change the **values** below as per your requirement.

1. Log in to the DbArchive Index Manager as a user allocated a token
2. Double click on the [PIH] Purchase Invoices EDM DbArchive table
3. In the Sage X3 Endpoint, enter **SEED**
4. In the Archive User, enter ADMIN
5. In the Invoice Number, enter **PIN0911F2200001**
6. Click Search
7. Your result will appear in the window below the search parameters, double click on it
8. Click the icon to 'edit tags'
9. Enter the new value for the Supplier Invoice Number
10. Click the save icon to commit the change
11. Close the parameter screen and close the DbArchive Index Manager

From now on, should a user view the Purchase Invoice PIN0911F2200001 in the SEED Sage Endpoint via Smart Retrieve, the Supplier Invoice Number will display the changed value.

## 7. EDM - How to Add Support for Additional File Types

### Assumptions:

- ▶ EDM for Sage X3 is installed
- ▶ The BLOB Type Manager client has been installed and a token has been allocated to the user who wishes to use it

EDM will accept any file-type, but it must be configured to allow it.

There are 20 default files types pre-configured for use with the system as standard, to add more, follow the steps below. In our example, we will use the xlsx file type (as this is currently not a standard file type):

- ▶ Load the BLOB Type Manager and login as an administrative user
- ▶ In the extension cell, enter **xlsx**
- ▶ In the description cell, enter a meaningful description of the file type
- ▶ Click the Add button
- ▶ xlsx should now be in the list and given a unique Type No.
- ▶ Files with a syntax of .xlsx can now be used in conjunction with SmartDeposit and when viewed externally using SmartRetrieve, will be opened in the Windows default application for xlsx.

*NOTE: Once a file type has been added, it cannot be removed.*

## 8. EDM – None standard Drilldown, Archive and Print Barcode Links

As part of the standard Implementation, you will have added the desired Links on the appropriate Sage X3 windows to allow for archiving / viewing documents and printing barcodes.

Enhancements are actively encouraged and most customers add to the standard solution which if fed-back are often then added to future releases to benefit others.

In the event that the existing features are required for a newly added object, the following steps.

**NOTE: Only certified Sage consultants or those who have attended the V1 Training course are advised to attempt this, errors can compromise functionality.**

### Assumptions

- ▶ A new DbArchive table has been created for a non-standard EDM object using the DbLogin Admin Console > DbArchive Table Editor

### [EDM] Archive Transaction

1. Log in to the Sage X3 as ADMIN (or equivalent user)
2. Navigate to Development > Processes > Processes > Script Editor (ADOTRT)
3. When prompted, open the process XV1ARCHIVETRANS
4. Scroll to the bottom of the file and add the following before the Endcase (replace the text **in red** with your new object details using the below example for reference):

```
When "GESBIS"  
  TRANSNUM = [F:PIH]NUM  
  OBJECT = "BIS"
```

5. Save / compile, close the process editor.

## [EDM] Archive Attachment

1. Log in to the Sage X3 as ADMIN (or equivalent user)
2. Navigate to Development > Processes > Processes > Script Editor (ADOTRT)
3. When prompted, open the process XV1ARCHIVEATTACH
4. Scroll to the bottom of the file and add the following before the Endcase (replace the text **in red** with your new object details using the below example for reference):

```
When "GESBIS"  
  TRANSNUM = [F:PIH]NUM  
  OBJECT = "BIS"
```

5. Save / compile, close the process editor.

## [EDM] View Transaction

1. Log in to the Sage X3 as ADMIN (or equivalent user)
2. Navigate to Development > Processes > Processes > Script Editor (ADOTRT)
3. When prompted, open the process XV1IMAGE
4. Scroll to the bottom of the file and add the following before the Endcase (replace the text **in red** with your new object details using the below example for reference):

```
When "GESBIS"  
  Call VIEWDOCUMENT("INV_NO", "BIS", [M:BIS0]NUM) From XV1IMAGE
```

5. The first value in the VIEWDOCUMENT call corresponds to the DbArchive field you want to drilldown to, the second is the Sage Object and the third is the field in Sage that contains the data that the first value corresponds to.
6. Save / compile, close the process editor.

## [EDM] View Attachment

1. Log in to the Sage X3 as ADMIN (or equivalent user)
2. Navigate to Development > Processes > Processes > Script Editor (ADOTRT)
3. When prompted, open the process XV1IMAGEATTACH
4. Scroll to the bottom of the file and add the following before the Endcase (replace the text **in red** with your new object details using the below example for reference):

```
When "GESBIS"  
  Call VIEWDOCUMENT([M:BIS0]NUM) From XV1ATTACH
```

5. The first value in the VIEWDOCUMENT call corresponds to the data in Sage that matches what's in the Transactional Attachments DbArchive table.
6. Save / compile, close the process editor.

## Print Barcode

1. Log in to the Sage X3 as ADMIN (or equivalent user)
2. Navigate to Development > Processes > Processes > Script Editor (ADOTRT)
3. When prompted, open the process XV1BARCODE
4. Scroll to the bottom of the file and add the following before the Endcase (replace the text **in red** with your new object details using the below example for reference):

```
When "GESBIS"  
  Local File PINVOICE [PIH]  
  Raz [F:PIH]  
  Read [PIH]PIH0=NUM  
  If !fstat  
    NAME=[PIH]BPRNAM  
    NUMBER=[PIH]BPRVCR  
  Endif  
  Call PRINT_BARCODE([F:PIH]NUM,"V1PIH",NAME,NUMBER) From XV1BARCODE
```

5. Save / compile, close the process editor.

You can now add the links to the screen as per the instructions in the Server Implementation Guide.

## 9. EDM - SmartSuite – Manually altering settings post-install

### Assumptions:

- ▶ EDM for Sage X3 is installed
- ▶ The path to the Server Installation is C:\V1
- ▶ In this **example**, the V1 Server is called MYV1SERVER, **change as appropriate**

In the event that there is an environmental change to the system, say the SQL password has changed, the following explains what to do:

### 9.1 Smart Suite

- ▶ From any PC with access to MYV1SERVER, open your web-browser of choice and navigate to <http://MYV1SERVER:5002>
- ▶ Login as administrator / administrator
- ▶ Change the url to be <http://MYV1SERVER:5002/config> and press enter
- ▶ Make your desired change
- ▶ Click configure integration server
- ▶ Make your desired change
- ▶ Click OK at the bottom of the screen
- ▶ Log out

### 9.2 V1 Smart Mail

- ▶ Login to the V1 Server, *preferably as an administrative user*
- ▶ Open windows file explorer and navigate to C:\V1\utils
- ▶ Right click and **run as administrator** the **start\_services\_debug\_smartmail.bat**

*This stops the service and starts it in debug (V1 Smart Mail can only be configured in debug mode to protect against erroneous changes)*

- ▶ Open your web-browser of choice and navigate to <http://MYV1SERVER:8444>
- ▶ Make you desired changes
- ▶ Click the SAVE CONFIGURATION button at the bottom of the screen
- ▶ Provided everything is good to go, you'll get a dialog to indicate that, close your browser
- ▶ Close the cmd window with the debug
- ▶ Restart the V1 Smart Mail service

## 10. PIA - How to manually activate the ABBYY license

### Assumptions:

- ▶ PIA by V1 for Sage X3 is installed
- ▶ The V1 Server where it is installed has internet connectivity
- ▶ The installation is in a directory called D:\SAGE\V1

**Q:** What is ABBYY?

**A:** The ABBYY FineReader Engine is the underlying technology that allows the extraction of data from a document using OCR (**O**ptical **C**haracter **R**ecognition).

DbCapture needs this to interpret the information extracted so it can be used to then pass a payload to create an Invoice / Sales order in Sage X3.

When running the R13 setup program, at the end of the PIA installation, you are asked to launch the ABBYY licensing program to activate it.

If the ABBYY license has not yet been sent and this step has been skipped (not recommended) you can manually run the license program to activate it when the license has been received:

### R13 and R13 Patch 1

1. In Windows File Explorer, browse to the C:\V1\DbCapture\ABBYY\Bin64 directory
2. Locate the LicenseManager.exe and double click it
3. Click Activate License ...
4. Enter the supplied licensing information.
5. Click Next.
6. Select activation method (via internet preferred).
7. Click Next and finish to complete the licensing
8. Restart the ABBYY.Licensing.FineReaderEngine.Windows.11.0 and all DbCapture\* services

### Patch 2 Onwards

There is no longer a requirement to activate an ABBYY license as this is handled by the V1 Licensing server.



## 11. PIA - How to manually deactivate / move the ABBYY license

### Assumptions:

- ▶ PIA by V1 for Sage X3 is installed
- ▶ The V1 Server where it is installed has internet connectivity
- ▶ The installation is in a directory called D:\SAGE\V1

**Q:** What is ABBYY?

**A:** The ABBYY FineReader Engine is the underlying technology that allows the extraction of data from a document using OCR (**O**ptical **C**haracter **R**ecognition).

DbCapture needs this to interpret the information extracted so it can be used to then pass a payload to create an Invoice in Sage X3.

When running the R13 setup program, at the end of the PIA installation, you are asked to launch the ABBYY licensing program to activate it.

If you have been given a test license, or want to move your license from a TEST to a LIVE server, the current one needs to be de-activated.

### R13 and R13 Patch 1

1. In Windows File Explorer, browse to the C:\V1\DbCapture\ABBYY\Bin64 directory
2. Locate the LicenseManager.exe and double click it
3. Right click on the license in use in the list and click Deactivate ...
4. Click Next.
5. Select deactivation method (via internet preferred).
6. Click Next and finish

Now de-activated, using the instructions on the previous chapter, it can be activated on an alternative server for instance.

**NOTE: Without an ABBYY license, no PIA documents can be processed.**

### Patch 2 Onwards

If you are moving servers and re-installed, you will need a new license. Contact the V1 support team and request one.

## 12. EDM - PIA - How to manually change the values in Vault

### Patch 3 onwards only

Vault is a web based application served locally by the V1 Server securely storing all sensitive information needed to communicate with Sage (such as the soap login credentials) and the various components of the EDM solution (such as the DbLogin username and password needed by background tasks.)

Vault is installed and configured automatically using the setup program for a fresh install and Patch Program for an upgrade.

If there is a requirement to manually change the details:

1. Log in to the V1 Server
2. Using your browser of choice, navigate to <http://127.0.0.1:8200>
3. You'll be prompted for your token

This can be found in the D:\SAGE\V1\utils\SmartConnect dir in the appsettings.json as the RTID value

4. Enter it and click Sign In
5. Click kv
6. You should then see the secret stores, EDM, PIA (where installed) and SAGE
7. Click on the one where the server-name, user or password requires change
8. Click on Edit secret
9. Edit the value
10. Click Save

NOTE: If changing the SAGE url, ensure it has a **trailing slash**.