



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 Installation – R13 Patch 1

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1. Introduction

Intended for experienced Sage, V1 and fully trained partners **only**, this is a guide for installing Patch 1 against the server components for:

- ▶ EDD for Sage X3
- ▶ EDM for Sage X3
- ▶ PIA for Sage X3

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

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

If you have performed a **fresh installation of R13** and have merged Patch 1 as part of the install, go to the chapter 'Post Patch Tasks'.

If you have installed R13 and want to **update it to Patch 1**, follow this document in full to complete the update.

2. Pre Installation Mandatory Assumptions

- ▶ EDM for Sage X3 (R13) is **already installed, implemented** and **tested** against the test / production Endpoints.

It has been installed in the D:\Sage\EDM directory.

- ▶ Ensure no users are using any of the EDD / EDM / PIA modules during the installation of Patch 1
- ▶ The Patch Program has been downloaded to C:\temp\PatchProgram.zip from the portal.
- ▶ Patch 1 has been downloaded to C:\temp\R13P1.zip from the portal.

*NOTE: these are **example** paths, change as appropriate to the actual installation.*

3. Patch Program

The PatchProgram is a simple UI to allow you to update on disk files within the EDM Solution.

It doesn't update the distribution, it updates what has already been installed.

Patches themselves will be in the form of zip files downloaded from the portal, all the PatchProgram does is un-compress the files and whatever it finds, will be backed up and updated.

Using File Explorer, navigate to C:\temp\ and un-compress the contents of PatchProgram.zip to a directory called D:\SAGE\EDM\PatchProgram

4. Apply Patch 1

To apply the fixes present in Patch 1, perform the following steps:

1. Using File Explorer, navigate to D:\SAGE\EDM\PatchProgram, right click and run PatchProgram.exe **AS ADMINISTRATOR**
2. When prompted, browse to C:\temp\R13P1.zip

NOTE: Assuming valid, it will un-compress the files to a temporary location in the EDM file structure

3. When ready, click Update
4. The system is analyzed for what is installed against what is in the zip file.
Only the installed files will be patched.
5. When completed click Close

If you are patching EDD only, go to the Post Patch Checklist.

If you are patching EDM or PIA, continue to the next chapter.

5. Apply the Sage Patches

5.1 EDD

There are no patches required for EDD.

5.2 EDM

1. Login in to Sage as an ADMIN user and select the **x3 reference Endpoint**
2. Click on **Development** then on > **Utilities** > **Patches** > **Patch Integration**
3. Ensure **Client** is selected as a destination type
4. **Ensure to TICK Patch integration and UNTICK Deferred validation**
5. Remove the X3 reference Endpoint from the grid
6. Keep all Endpoints to be patched at this point, remove all others

Before you click OK, make doubly sure Patch Integration is TICKED and Deferred validation is UNTICKED

7. Click OK
8. When prompted, click select file, browse to D:\SAGE\EDM\PatchProgram\R13P1\EDM\PROD_ENDPOINT and select X3EDM_0130001_60_000.dat
9. Wait for it to upload, click OK
10. When complete, close page.
11. If PIA is to be patched, go to 5.3, otherwise, continue to Chapter 6.

5.3 PIA

1. Login in to Sage as an ADMIN user and select the **x3 reference Endpoint**
2. Click on **Development** then on > **Utilities** > **Patches** > **Patch Integration**
3. Ensure **Client** is selected as a destination type
4. **Ensure to TICK Patch integration and UNTICK Deferred validation**
5. Remove the X3 reference Endpoint from the grid
6. Keep all Endpoints to be patched at this point, remove all others

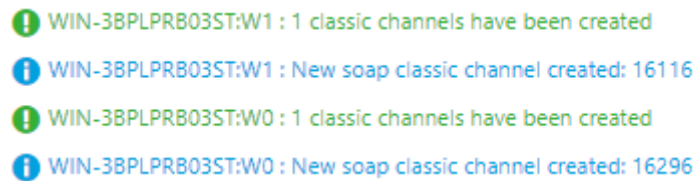
Before you click OK, make doubly sure Patch Integration is TICKED and deferred validation is UNTICKED

7. Click OK
8. When prompted, click select file, browse to D:\SAGE\EDM\PatchProgram\R13P1\PIA\PROD_ENDPOINT and select X3PIA_0130001_60_000.dat
9. Wait for it to upload, click OK
10. When complete, close page.
11. Now continue to Chapter 6.

6. Restart the Classic Pool(s)

The following tasks are an example and assume the Sage **SEED** Endpoint, but they must be performed for *each* Sage Endpoint you have patched for R13 Patch 1.

1. Go to **Administration > Web Services > Classic SOAP pools configuration**
2. Click on X3EDM**SEED**
3. Click on stop ... wait for the status to change to stopped
4. Click on Start/Update
5. Ensure you get channels assigned as per the below example:



! WIN-3BPLPRB03ST:W1 : 1 classic channels have been created
i WIN-3BPLPRB03ST:W1 : New soap classic channel created: 16116
! WIN-3BPLPRB03ST:W0 : 1 classic channels have been created
i WIN-3BPLPRB03ST:W0 : New soap classic channel created: 16296

If you do **not** get a channel assigned / a message similar to the above, **STOP**.

There may be a licensing / Syracuse problem and you need to contact your Sage representative to rectify / purchase a web-service license, this is not a problem with EDM but with Syracuse on which it relies.

7. Post Patch Tasks

EDM

To make the configuration of EDM simpler, the user of parameters is being extended. It means that rather than having multiple areas of the system storing / configuring various settings, they're held in one place, namely the EDM Connector ADX.

Patch 1 introduces / continues the use of the following which can now be set:

9	EDMLINK	EDM Link Check	0
10	EDMSERVER	EDM Server Name	172.26.49.214
11	EDMTYPE	EDM Link Type	1

EDM Link Check turns on / off the 'check' to see if an image is available to view.

1 means a lookup is done into the EDM Archive to see if an image is archived, if so, glow the link, if not, dim it out.

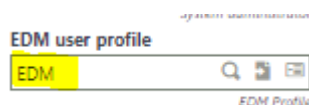
NOTE: Because of this check, some lower spec servers can experience minor performance issues when first opening a function.

0 means no lookup is done and the link is always available, but as no check is done, there may not be an image to see even if clicked. This is the default.

EDM Link Type allows you to choose how the user's drilldown is authenticated.

1 means use SmartRetrieve without passing a user. As per any web-application you're asked each time you click a link to view a document / attachment. If remembered, you're not asked again.

2 means pass a user name and password, so although you won't asked, it needs credentials. These are set using the same method as R12, namely, setting the EDM User profile in your Sage user.

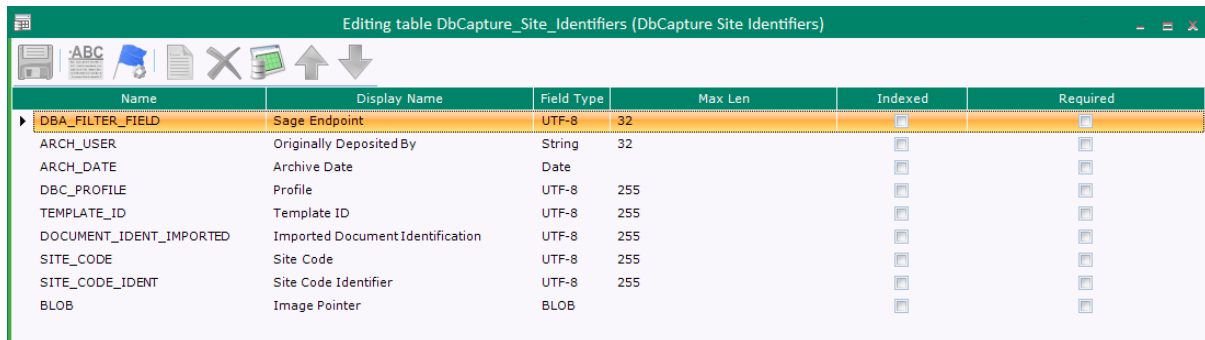


Tunnel to it, this username and password is the DbLogin username and password. Provided they have access to DbArchive, they will be authenticated automatically and never asked to login.

PIA

Now the use of the DbCapture Site Identifier table is mandatory for NONPOP Invoices, it must be re-aligned to match the enhancements in auto recognition of Site Codes.

1. On the V1 Server, log in to the **DbLogin Admin Console** using administrator / administrator
2. Click the **DbArchive Table Editor** (icon on the top right of the taskbar)
3. Double click on the **DbCapture_Site_Identifier** table
4. Using the tools reflect the following:



The screenshot shows a window titled "Editing table DbCapture_Site_Identifier (DbCapture Site Identifiers)". The window contains a table with the following columns: Name, Display Name, Field Type, Max Len, Indexed, and Required. The table lists the following fields:

Name	Display Name	Field Type	Max Len	Indexed	Required
DBA_FILTER_FIELD	Sage Endpoint	UTF-8	32	<input type="checkbox"/>	<input type="checkbox"/>
ARCH_USER	Originally Deposited By	String	32	<input type="checkbox"/>	<input type="checkbox"/>
ARCH_DATE	Archive Date	Date		<input type="checkbox"/>	<input type="checkbox"/>
DBC_PROFILE	Profile	UTF-8	255	<input type="checkbox"/>	<input type="checkbox"/>
TEMPLATE_ID	Template ID	UTF-8	255	<input type="checkbox"/>	<input type="checkbox"/>
DOCUMENT_IDENT_IMPORTED	Imported Document Identification	UTF-8	255	<input type="checkbox"/>	<input type="checkbox"/>
SITE_CODE	Site Code	UTF-8	255	<input type="checkbox"/>	<input type="checkbox"/>
SITE_CODE_IDENT	Site Code Identifier	UTF-8	255	<input type="checkbox"/>	<input type="checkbox"/>
BLOB	Image Pointer	BLOB		<input type="checkbox"/>	<input type="checkbox"/>

5. When completed, click the **Save** icon (top left icon)
6. Close the window, close the DbArchive Table Editor and close the DbLogin Admin Console.

8. Post Patch Checklist

EDD

Ensure the following services are set to / changed to Automatic (**Delayed Start**)

*NOTE: If you do not have the services installed, it just means you're not licensed to use the module to which it relates.**

- DbFax Scheduler*
- DbFax: Connection Server*
- EDD Outbound Management
- EDM Print Management

Ensure the configRuntime.json is properly configured (as per Chapter 14 of the standard [Server Installation](#) guide) to allow for the copying of files from the Sage server to the nominated share or the following error will occur when trying to process outbound documents:



EDM

In *addition* to those in the EDD section:

Ensure the following services are set to / changed to Automatic (**Delayed Start**)

*NOTE: If you do not have the services installed, it just means you're not licensed to use the module to which it relates.**

- DbArchive SQL Read Server:31418
- DbArchive SQL Write Server:31417
- DbArchive: Cache Cleaner
- DbArchive: EDM Import
- DbArchive: FTS Indexing Service*
- V1NodeIntegrationServer
- V1WebPortal

Ensure the EDM ADX Parameters have been reviewed and set accordingly

PIA

In *addition* to those in the EDD **and** EDM sections, ensure the following services are set to / changed to Automatic (**Delayed Start**)

NOTE: If you do not have the services installed, it just means you're not licensed to use the module to which it relates.

- DbCapComms Admin Client:31451
- DbCapComms Interactive Client:31450
- DbCapComms Util Client:314512
- DbCapture OCR Server
- DbCapture: Capture Service
- DbCapture: Export Service
- DbCapture: PDF File Watcher
- DbCapture: Queue Management
- V1 SmartMail