



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 2

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# 1. Introduction

Intended for experienced Sage, V1 and fully trained partners **only**, this is a guide for installing Patch 2 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 2 as part of the install, go to the chapter 'Setting new Parameter Values'.

If you have installed R13 with Patch 1 and want to **update it to Patch 2**, 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.

- ▶ **Patch 1** has been applied
- ▶ Ensure **no users are using any of the EDD / EDM / PIA modules** during the installation of **Patch 2**
- ▶ The Patch Program has been downloaded to C:\temp\PatchProgram.zip from the portal.
- ▶ Patch 2 has been downloaded to C:\temp\R13P2.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 2

To apply the new enhancements present in Patch 2, 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\R13P2.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. You will now see a screen prompting you as to whether to use https or not. Click this box if you wish to use https for communication with Sage X3.
6. There are 3 options for the new licensing component for R13 Patch 2. If you're not using any of these / do not wish to update them, leave them blank.
  - a. DbCapture update
    - i. If the customer is using PIA, provide the new license
  - b. DbArchive FTS
    - i. If the customer is using DbArchive FTS, provide the new license
  - c. SmartMailSend
    - i. If the customer wishes to use SmartMail**Send**, provide the new license
7. Click Next
8. Update of components is performed.

**NOTE: This will take several minutes, you will see periods of inactivity, this is normal. Allow to finish. Do not click Cancel / or on any messages during the update or you will compromise the procedure.**

## 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\R13P2\EDMPROD\_ENDPOINT and select X3EDM\_0130002\_60\_000.dat
9. Wait for it to upload, click OK
10. When complete, close page.

### 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\R13P2\EDMPROD\_ENDPOINT and select XV1PIA\_0130002\_60\_000.dat
9. Wait for it to upload, click OK
10. When complete, close page.

## 6. Setting new parameter values

The following tasks should be performed on the server where EDM has been installed, whether a standalone server, or on the Sage Application Server.

- In our **example**, the Endpoint is **SEED**, this procedure needs to be repeated for **EVERY** Production endpoint that wishes to use EDM, **change as appropriate**
  - In our **example**, the server IP address or hostname where EDM has been installed is **MYSERVER123**, **change as appropriate**
1. Make sure you are logged in to the **SEED** Endpoint
  2. Go to Setup / Parameters > General Parameters > Parameter Values (ADPVAL)
  3. In the Module / Chapter cell, enter ADX and press tab
  4. Click the action button to the left of the 'EDM connector' entry and click details
  5. Populate the **File Transfer Method** with either **Disk** or **Mail**
    - a. If using Mail\*
      - i. Populate **EDD Mailbox** with a mailbox to receive emails for EDD
      - ii. Populate **[EDM] Attachment Mailbox** with a mailbox to receive emails for attachments to translations
      - iii. Populate **From email address** with a mailbox as the from address for email traffic
      - iv. Populate **[EDM] Transactional Mailbox** with a mailbox to receive emails for transactions
      - v. Populate **Barcode Print Mailbox** with a mailbox to receive emails for barcode prints
    - b. If using Disk no further action
  6. Click OK and return the Parameter Values screen
  7. Click Save to commit the settings
  8. Click Close Page

If you are using **Mail** as the File Transfer Method, consult the chapter 'Configure V1 SmartMail' in the standard [Server Implementation Guide](#) to complete the procedure, then return to this guide.

If you are using **Disk** as the File Transfer Method, no further action is required.

## 7. Post Patch Tasks

### SmartSuite

The settings for the SmartSuite are reset to default as part of the update to DM4.6 and need to be re-confirmed. No data is lost, it's just a case of setting them again.

- ▶ In your web-browser of choice, go to <http://V1SERVER:5002>
- ▶ Click Configure Integration Server
- ▶ Scroll down to the Smartretrieve indexing section and re-enter the details:
  - ▶ jdbc:sqlserver://SQLSERVER\SQLINSTANCE;Database=DbArchive
  - ▶ SQL User for the EDM database
  - ▶ SQL password for the EDM database
- ▶ Click Test JDBC Connection
- ▶ Click Rebuild all search indices
- ▶ Scroll to the bottom, click OK

### EDD

C:\V1Home\EDDOUTBOUNDMANAGEMENT\EDDOUTBOUNDMANAGEMENT.def

- ▶ Ensure the V1\_DIR variable is set to the route directory of the installation, i.e.  
V1\_DIR, , "D:\Sage\EDM"
- ▶ Ensure the DBARCHIVESERVER variable is set to the IP address / DNS of the EDM server, i.e.  
DBARCHIVESERVER, , "SERVERNAME"

C:\V1Home\EDMPRINTMANAGEMENT\Print\_Pickup.def

- ▶ Ensure the #USES variable is set to the home directory of the DbArchive installation, i.e. #USES  
"D:\Sage\EDM\DbArchive\V1\_SETTINGS.DEF"
- ▶ *Optional:* Assuming the ITDEPT DbLogin user has their email set, setting the  
EMAILITDEPTONFAILURE variable can send an email alert to inform them if a print has failed  
containing the reason behind it and suggestions for resolution. To activate this, set the  
EMAILITDEPTONFAILURE, , "1" and save the file.

NOTE: If any bespoke changes have been made since Patch 2 to either of these files, they must be manually re-instated using the files in the .R13PATCH2 dir at the root of the V1 directory for reference.

### EDM

C:\V1Home\EDMIMPORT\EDMIMPORT.def

- ▶ Ensure the #USES variable is set to the home directory of the DbArchive installation, i.e.  
#USES "D:\Sage\EDM\DbArchive\V1\_SETTINGS.DEF"

NOTE: If any bespoke changes have been made since Patch 2 to this file, they must be manually re-instated using the files in the .R13PATCH2 dir at the root of the V1 directory for reference.

## 8. Core software Enhancements

The core software version driving the EDM for Sage X3 (R13) solution is **DM4**.

EDM for Sage X3 (R13) was first released against **DM4.5.1**.

EDM for Sage X3 (R13) Patch 1 had numerous functional fixes and enhancements, but remained on **DM4.5.1**.

EDM for Sage X3 (R13) Patch 2 as well as providing bug-fixes and minor enhancements for the add-on components, also updates the core software to **DM4.6**.

### 8.1 Server / Client communication

Previous releases of the EDM for Sage X3 (R13) solution relied on TCP-IP communication between clients (such as DbScanner and DbCapture Admin) and the V1 Server.

The core software update to **DM4.6** means EDM for Sage X3 (R13) Patch 2 is optimized and defaults to **http/s** communication between server and clients.

Consult the [Server](#) / [Client](#) Implementation Guides respectively for details.

### 8.2 SmartMail

Previous releases of the EDM for Sage X3 (R13) used SmartMail to poll mailboxes for inbound delivery of emails, the PDF attachments of which are imported into DbCapture for OCR processing.

SmartMail continues to allow inbound emails to be received, but has now been enhanced to also allow the **outbound delivery** of emails, relaying through existing accounts.

It has been optimized to use Gmail and Outlook 365 with TLS / SSL, as well as maintaining support for on premise mail servers.

NOTE: If a hosted mail provider was a requirement, previous releases silently installed a free TLS tool called [stunnel](#), this is no longer required if using SmartMailSend.

Having applied Patch 2, if you wish to use Gmail / Outlook 365 / use SmartMail rather than DbMail to relay outbound emails:

- ▶ On the V1 Server, stop the V1SmartMail service (NOTE: SmartMail can only be configured in debug mode)
- ▶ Using File Explorer, navigate to **D:\Sage\EDM\utils** and run the **start\_services\_debug\_smartmail.bat** as administrator
- ▶ In your web-browser, navigate to <http://V1SERVER:8444>

## 8.2.1 TLS Settings

SMTP using TLS	GMail	Outlook 365	Local
PORT	587	587	587
TSL	true	true	true
SSL	false	false	false
HOST	smtp.gmail.com	smtp.office365.com	yourdomain.com*
DOMAIN	gmail.com	outlook.com	username@yourdomain.com*
USER	username*		
PWD	password*		
Authentication	NONE	PLAIN/NONE	None
NOTES	For Gmail Domain is not required for User		DOMAIN name is Required in USER Name

\*Change where applicable to your actual account

## 8.2.2 SSL Settings

SMTP using SSL	GMail	Outlook 365	Local
PORT	465	465	-
TSL	False	false	false
SSL	true	true	true
HOST	smtp.gmail.com	smtp.office365.com	Test.com
DOMAIN	Gmail.com	Outlook.com	Test3@test.com
USER	username*		
PWD	password*		
Authentication	NONE	PLAIN/NONE	None
NOTES	For Gmail Domain is not required for User		DOMAIN name is Required in USER Name

## 8.2.3 Activate the use of SmartMailSend

If you wish to use SmartMailSend rather than DbMailSend:

- ▶ On the V1 Server, edit the **C:\V1Home\V1\_SETTINGS.def** file and set the Mail variable to 1, save the file.

## 9. Cloud Printing Enhancements

Primarily, EDD for Sage X3 (R13) is designed to email documents, however where email is not possible, the document can be printed.

Although the responsibility of the hosting provider to provide access to printers, to facilitate this on a hosted / AWS environment that does not have access to your existing hardware, V1 recommend the use of [Google Cloud Print](#).

The following are detailed instructions on how to configure your existing printers in your office / place of business for use with EDD for Sage X3 (R13) Patch 2 that is hosted on for instance, AWS.

### 9.1 Mandatory Requirements

- ▶ You must have a shared printer installed and available to the users who wish to use it
- ▶ You must have a Google Account accessible to both the Office PC administering the printers and the AWS server
- ▶ You must have Google Chrome installed on both the Office PC administering the printers and the AWS server

### 9.2 From your Office / Place of business, add your printer(s) to Google Cloud Print

1. Ensure your printer is on and shared for you as an individual
2. On your PC, open Chrome.
3. At the top right, click the three dots and click Settings.
4. Scroll to the bottom, click Advanced.
5. Under "Printing," click Google Cloud Print.
6. Click Manage Cloud Print devices.
7. If prompted, sign in with your Google Account.
8. Select the printers you want to connect, and then click Add printer(s).
9. Tick the box for 'Local Machine' and 'automatically register new printers I connect'
10. Click the manage button next to the printer you have added
11. Click the share button
12. Populate the email address with an account accessible by the AWS server, click Share

### **9.3 Logged in to the AWS server / V1 Server where EDD is installed**

Now a request has been sent to the account wishing to print, it needs to be enabled and added as a printer like any other.

1. Open Google Chrome and log in to the Google account where the request to share was sent
2. You should see a Google Cloud Print Notification, click Add Printer
3. Still in Chrome, go to Settings > Advanced > Printing > Google Cloud Print > Manage Printer
4. Select the new printer in your list
5. It will now be available as a printer on the AWS server
6. Click the Start button, and then, on the Start menu, click Devices and Printers.
7. Click Add a printer.
8. In the Add Printer wizard, click Add a local printer.
9. On the Choose a printer port page, make sure that the Use an existing port button and the recommended printer port are selected, and then click Next.
10. Complete the additional steps in the wizard, and then click Finish.