V1

V1 Document Management

EDD for Sage X3

Electronic **D**ocument **D**elivery

EDM for Sage X3

Electronic **D**ocument **M**anagement

PIA for Sage X3

Purchase **I**nvoice **A**utomation

SOA for Sage X3

Sales **O**rder **A**utomation

Server Installation – R13 Patch 3

Updated – 29th March 2021

Contents

1.   Introduction

Intended for experienced Sage, V1 and fully trained partners **only**, this is a guide for installing Patch 3 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 3 as part of the install, go to the chapter 'Post Patch Tasks'.

If you have installed R13 with Patch 1 and Patch 2 and want to **update it to Patch 3**, 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** AND **Patch 2** have been applied

▶ Ensure **no users are using any of the EDD / EDM / PIA modules** during the installation of **Patch 3**

▶ The Patch Program has been downloaded to C:\temp\PatchProgram.zip from the portal.

▶ Patch 3 has been downloaded to C:\temp\R13P3.zip from the portal.

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

3. Pre-Installation Task

Patch 3 includes the same sample users out the box to allow the system to be functional straight away.

Assuming you are upgrading to Patch 3 from a previous patch and the system has been used, it is likely to have several other day to day users created beyond the sample users.

These user details are stored in simple xml files on disk, to preserve them, they must be manually backed up prior to applying Patch 3 and can then be re-instated post installation.

1. Using File Explorer, navigate to the D:\SAGE\EDM\DbLogin directory
2. Take a backup of the userlist.xml and users.xml

Once you have applied Patch 3, new versions of these files will be in place so your backups will then need to be re-instated. This is covered in a later chapter.

4.   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**

5.   Apply Patch 3

To apply the new enhancements present in Patch 3, 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\R13P3.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. Click Next
6. 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.

6. Apply the Sage Patches

6.1 EDD

There are no patches required for EDD.

6.2 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\R13P3\EDM\PROD_ENDPOINT and select X3EDM_0130003_60_000.dat
9. Wait for it to upload, click OK
10. When complete, close page.

6.3 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\R13P3\PIA\PROD_ENDPOINT and select XV1PIA_0130003_60_000.dat
9. Wait for it to upload, click OK
10. When complete, close page.

7.   Post Patch Tasks

The following steps are one off best practice checks to ensure the system is correctly configured based on the customer requirements.

Each file is responsible for a particular activity, in the majority of cases the default values are suitable but you are advised to familiarize yourself with each one.

EDD

C:\V1Home\EDDOUTBOUNDMANAGEMENT**EDDOUTBOUNDMANAGEMENT.def**

This file is responsible for the distribution of documents generated from Sage X3.
Patch 3 introduces several new options:

▶ Set the MODE variable depending on whether just to distribute documents or to distribute AND archive them.
`VARIABLE = MODE,,"EDM"`

▶ *Optional*: Set the ALERT variable to activate an email alert for any issues with distribution to a nominated DbLogin user / users
`VARIABLE = ALERT,,"1"`

▶ *Optional*: Where ALERT = 1, set the USERSTOINFORM variable listing one or more DbLogin users to be emailed for any issues with distribution
`VARIABLE = USERSTOINFORM,,"APDEPT"`

▶ *Optional*: Where ALERT = 1, set the ATTACHFAILEDDOCS variable to decide how failed documents are attached / listed in the email.
`VARIABLE = ATTACHFAILEDDOCS,,"1"`

▶ *Optional*: Where ALERT = 1, set the MAXATTACHMENTSIZE variable to decide the maximum size of attachment (in MB's) to email failed documents.
`VARIABLE = MAXATTACHMENTSIZE,,"10"`

▶ *Optional*: Where CLEANUPPROCESSED = 1, it will periodically clean up the processed directory of files on disk to preserve disk-space.
`VARIABLE = CLEANUPPROCESSED,,"1"`

▶ *Optional*: Where CLEANUPPROCESSED = 1, set the AGECHECK value to the number of days processed files remain before they are cleaned up.
`VARIABLE = AGECHECK,,"7"`

▶ 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"`

EDD

C:\V1Home\EDMPRINTMANAGEMENT**Print_Pickup.def**

This file is responsible for the printing of documents generated from Sage X3.
Patch 3 introduces several new options:

- ▶ 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 .R13PATCH3 dir at the root of the V1 directory for reference.

EDM

C:\V1Home\EDMIMPORT**EDMIMPORT.def**

This file is responsible for all archiving activity from within Sage X3 or from a document distributed via EDD where EDM is installed.

▶ 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 .R13PATCH3 dir at the root of the V1 directory for reference.

PIA

C:\V1Home\DbCapture\defs**V1_SETTINGS_DBCAPTURE.def**

This file is responsible for all options and connectivity to Sage X3 with regards Invoice creation and validation.

Several enhancements have been added to give more flexibility around status messages, Site Code auto identification, Process Type selection and more.

Review the following variables and make selections that best fit the Customer.

An explanation of each is defined in detail in the file.

In the majority of cases, the default values are sufficient, but you are advised to familiarize yourself with all the new settings now available.

```
LET CHECK_ARCHIVE_DUPLICATE = 1
LET CHECK_ERP_DUPLICATE = 1
LET CHECK_ONHOLDQUEUE_DUPLICATE = 1
LET VALID_COMMENT_CHARACTERS = "_0123456789QWERTYUIOPASDFGHJKLZXCVBNM- "
LET GRID_ORDER_NUMBER_CHOICE = "ORDERS"
LET OBJECTTYPEFORNONPOP = "PIH"
LET SITECODEIDENTSEVERITY = "0"
LET FINDPOHORPTHFROMOCR = "0"
let POHPATTERNSEQUENCE = " [ ]*[A-Z][ ]*[A-Z][ ]*[0-9][ ]*[0-9][ ]*[0-9][ ]*[0-9][
]*[0-9][ ]*[0-9][ ]*[0-9]
LET SUMOFLINESSEVERITY = "1"
LET ADVANCEDCURRENCYCHECK = "0"
LET CURRENCIESTOCHECK = " GBP|USD|EURO|CHF|£|$|€"
LET PASSPIHDIRECTTAX = "0"
LET PASSPIHPOPTAX = "0"
```

8. Translations

The biggest and most significant enhancement for R13 Patch 3 is that the solution is now translatable.

Its implementation is in three parts:

- ▶ Core Translations
  - ▶ The SmartSuite UI (EDM)
  - ▶ DbCapture clients (PIA)
- ▶ Scripting translations, such as text displayed in emails and lookup responses
- ▶ Add-on translations, such as text displayed to a user from day to day activity from within Sage X3

The combination of the above means the 'solution' is translated, but each area has its own method of implementation to allow it to be configured in isolation.

8.1 Core Translations

8.1.1 SmartSuite

All translations for UK English and French in the SmartSuite are provided 'out the box', so no action is needed in terms of additions, however you are advised to be familiar with its setup if any changes are required.

A web front end has been provided to allow the SmartSuite UI to be translated, the interface is hidden from daily use as it only meant for administrators.

On the V1 EDM Server, open your web-browser and go to:

http://localhost:5002/portal

Login as administrator / administrator
Manually change the url to:

http://localhost:5002/config

Press Enter
Click Configure Integration Server
Scroll about two thirds of the way down and click Manage Translations

Consult the documentation on the Portal for more details.

8.1.1 DbCapture Clients (PIA)

The Client UI's are translated in 3 parts:

- Interface such as menu items and buttons.
  - These cannot be translated at this time as they are hard-coded in the dll's provided with the client installation.

- DbCapture Profile display names
  - Up to two languages can be used at any one time, the display names are separated by a pipe symbol.
    - If no pipe is found, only that string will be used.
    - If a pipe is found, the language to left will be English, the one to the right French and so on.
  - To change these values:
    - Open the DbLogin Admin console
    - Click the DbCapture Profile Manager icon
    - Double click on the PIA_Express profile
    - On the Main tab you will see each field and the display name on the pane on the right, make any changes you see fit, click OK
    - Click the Save icon at the top to commit the changes

- Messages back to the user from Sage during validation
  - These are taken from the scripting translations covered later in this document

The combination of the above allows a user to flip between English / French and all text they see will be in the language they selected with no further configuration required.

8.1 Add-on Translations

8.1.1 UI Messages

The UI messages are those that pop up from within Sage itself when using EDM, either to return information or an error, i.e. if you click on [EDM] Archive Transaction and get a message to say "Your Document has been archived successfully" etc …

Repeat the below for *each* Sage production Endpoint where EDM has been applied and *not* to the X3 Endpoint.

1. Login in to Sage as an ADMIN user and select an Endpoint patched for EDM
2. Click on > Translations > Import Messages
3. Ensure Client is selected as the Location
4. Click OK
5. Where prompted, from the R13 distribution, navigate to \PATCH\EDM\PROD_ENDPOINT and select F1576583282414
6. Click OK
7. You should see a log file with reference to the text that has now been imported

8.1.2 Link Text

As standard, 5 links are added to the screens where the archiving, viewing of images and printing barcodes has been implemented.

These links can be translated so the user can see them in their desired language.

1. Login in to Sage as an ADMIN user and select an Endpoint patched for EDM
2. Click on > Translations > Text Translation
3. In the Text search cell in the left list, select contains and enter [EDM] and press enter

Text Translation

Number	Text	Language
	▥ [EDM]	
100154	[EDM] Archive Transaction	BRI
100155	[EDM] View Transaction	BRI
100156	[EDM] Archive Attachment	BRI
100157	[EDM] View Attachment	BRI
100158	[EDM] Print Barcode	BRI

4. This should find 5 links, click on the first one and where prompted for language, enter FRA and press tab
5. It will default to be the same as English, enter the French translation, click Save
6. Repeat the above steps for each of the 5 links

8.2 Scripting Translations

No web-front end is provided for the scripting / feedback messages from EDD / EDM / PIA, however they can be changed manually using a suitable text editor such as Notepad++.

In order to pass variables and therefore correctly construct a sentence in any language, text is indexed:

In English would be:

Your search {{0}} has returned no results for Document Type {{1}}, please try again.

In Spanish would be:

Su búsqueda {{0}} no ha devuelto resultados para el tipo de documento {{1}}, intente nuevamente.

And so on.

All English and French messages have been provided.
They can be found on the V1 Server in the \V1Home\SmartSuite\NIS\lang\ directory with a suffix of –int.json.

9.   Post-Installation Task

Now Patch 3 has been applied, your DbLogin users can be re-instated from your backup.

1. Go to Services.msc and stop the DbLogin service
2. Using File Explorer, navigate to the D:\SAGE\EDM\DbLogin directory
3. Remove the files userlist.xml and users.xml
4. Re-instate the backup files you took in the previous chapter
5. Restart the DbLogin service

All users you created when running on the previous patches will now be re-stored.