



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

Updated – 24th February 2021

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1. Introduction

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

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

On the portal this document is complimented by videos which walk you through the installation and patching procedures.

This document has many chapters and can seem lengthy, but follow it properly, don't skip any steps and provided you have everything you need should take no more than an hour or so.

Each chapter corresponds to a task that must be completed to ensure a successful installation and may only take a few minutes.

2. Pre Installation Information

- ▶ The EDM for Sage X3 solution is only compatible with PU9 onwards.
- ▶ It can be installed on its own server independent to the Sage Application server.
- ▶ For a small implementation, particularly with no PIA, you are advised to install it on the Sage Application Server.
- ▶ For a medium implementation, with or without PIA, you advised to install it on its own server, although not essential.
- ▶ For a large implementation, usually with PIA, you advised to always install it on its own server.
- ▶ EDM is only compatible with Windows (versions 2008 R2 onwards)
PIA and SOA are also only compatible with Windows (versions 2008 R2 onwards)
- ▶ EDM is only compatible with SQL Server (versions 2008 R2 onwards)
PIA and SOA are also only compatible with SQL Server (versions 2008 R2 onwards)
- ▶ Although it is recommended to install them on the same instance of SQL Server as Sage X3 (assuming this is also SQL), it is not a requirement.
- ▶ If Sage is not installed against SQL Server, the EDM, PIA and SOA databases must be installed on a SQL instance.
- ▶ EDM requires a SQL database to hold the documents committed.
This will be created by the setup program.
- ▶ PIA & SOA require a SQL database to hold the queue data.
This will be created by the setup program.

3. Sage Pre-Installation Tasks - Database

This can be done at any-time in advance of the installation.

Optional V1USER

You are advised to create a dedicated SQL login called **V1USER** whose sole job will be to connect and administrate the EDM / PIA / SOA databases.

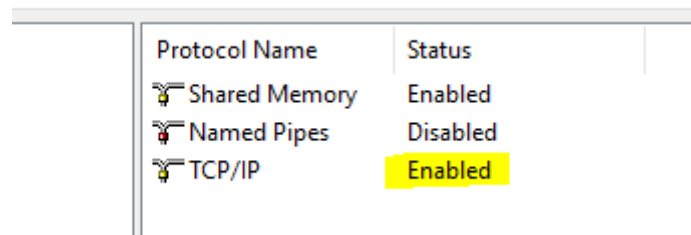
If you're comfortable using 'sa' then skip this step and use the 'sa' credentials when prompted by the setup program.

1. Open the SQL Management console and connect to the instance you intend to install EDM / PIA / SOA
2. Double click Security
3. Right click on Logins and select New Login ...
4. Give a login name of **V1USER**
5. Select SQL Server authentication
6. Confirm the desired password
7. Un-tick enforce password policy
8. Click Server roles on the left hand side
9. Click dbcreator, sysadmin and public
10. Click OK

Mandatory TCP-IP Configuration

The SQL Server must be configured to allow TCP-IP connections.

1. Open the SQL Server Configuration manager
2. Double click on SQL Server Network Configuration
3. Click on Protocols for <SERVERNAME>
4. In the pane on the right hand side, ensure TCP/IP is enabled



The image shows a screenshot of the SQL Server Network Configuration window. It displays a table with two columns: 'Protocol Name' and 'Status'. The 'TCP/IP' protocol is highlighted in yellow and is set to 'Enabled'. The other protocols, 'Shared Memory' and 'Named Pipes', are set to 'Disabled'.

Protocol Name	Status
Shared Memory	Enabled
Named Pipes	Disabled
TCP/IP	Enabled

5. At a convenient time, restart the SQL Server (<INSTANCENAME>) service to commit the change

4. Sage Pre-Installation Tasks - Interface

Before installation, there are a number of steps required that must be performed so that the patches will apply correctly and the solution will function as expected.

The following tasks are an **example** and assume the Sage **SEED** Endpoint, but they must be performed for **each** Sage Endpoint you actually intend to install against.

▶ Sage SEED Endpoint must be set as Specific

1. Change / ensure your Endpoint is the **Sage SEED Endpoint** / log in to the **Sage SEED Endpoint** as ADMIN
2. Go to Setup / Parameters > General Parameters > Folders (**GESADS**)
3. In the left list, click the **SEED** Endpoint
4. Tick the box for **Specific folder**
5. Click Save

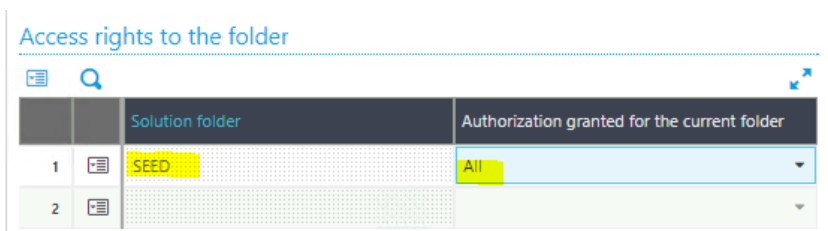
NOTE: During training / the SEED sample Endpoint, you may be warned regarding activity codes such as PORP / KRU and so on:

- Click the Options tab
- Change the Page size dropdown to display 500 records (to make it easier to find the activity code(s) warned about)
- Locate the activity code(s) stipulated in the warning message(s) and set them to **No**
- Click Save
- Repeat these steps until you are able to click Save without a message

6. Click Close Page

▶ Access rights from the Sage reference Endpoint to all Sage X3 production Endpoints

1. Change / ensure your Endpoint is the **Sage reference Endpoint** / log in to the **Sage reference Endpoint** as ADMIN (this is usually just called 'X3')
2. Go to Setup / Parameters > General Parameters > Folders (**GESADS**)
3. In the left list, click the **X3** Endpoint
4. Click the **Links** tab
5. Ensure the **SEED** folder is given a value of **All** in the [Access to rights to the Folder](#) section:



		Solution folder	Authorization granted for the current folder
1		SEED	All
2			

6. Repeat this for ALL Production Endpoints you wish to install EDM / PIA / SOA against
7. Click Save
8. Click Close Page

5. Create 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 actually intend to install against.

NOTE: A ClassicPool needs a language and you must ensure this has been licensed against the Sage Endpoint using the GESADS function > Initialize tab for each Sage Endpoint you intend to use. You are recommended to use ENG (English - American)

1. Login in to the Sage front screen as an ADMIN user and select the **X3 reference Endpoint**
2. Go to Administration > Administration > Servers > Hosts
3. Click on the server link in the list (main Syracuse server)
4. Ensure there is *at least* 1 web-services child process

NOTE: This value depends on the expected load, 1 is the minimum requirement, 2 or more is recommended

5. If changed, click Save
6. Close page
7. Go to Administration > Administration > Web Services > Classic SOAP pools configuration
8. Click Create soapClassicPool
9. When prompted as an alias, it must follow the naming convention X3EDM<ENDPOINTNAME> so for example **SEED** would be X3EDM**SEED**, TEST would be X3EDM**TEST** and so on. For our example, enter X3EDMSEED as an alias and press tab.
10. Tick Auto start
11. Set the Initialization size to 2
12. Set the maximum size to be 2

NOTE: These settings depend on the expected workload. 2 is for demo and training.

13. In the Endpoint cell, use the magnifying glass to select the **SEED** Endpoint, when selected, press tab
14. In the Locale cell, use the magnifying glass to select your language, when selected, press tab
15. In the User cell, use the magnifying glass to select an admin user, press tab
16. Click the Save button
17. Click the Start/Update button
18. 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
```

19. If you do not get a channel assigned / a message similar to the above, **STOP**. There may be a licensing problem and you need to contact your Sage representative to activate / purchase a web-service license.

6. EDM Functionality requirements

Electronic Document Management (EDM) is the method by which inbound or outbound documents are archived into the EDM database.

These documents are either then accessible from within the Sage interface, or externally via V1 Smart Retrieve.

In order to use some of the enhanced features of the setup program, the following assemblies must be present on the **server that runs the setup program**:

C:\Windows\assembly\Microsoft.SQLServer.Smo Version 10.0.0.0

If you do **not** have these assemblies on the server you are installing EDM on, there are 2 ways to sort it out:

1. If you already have a SQL instance you want to use, but don't have the assemblies on the server:

Download this: <http://support.wearev1.com/software/x3/R13/SQLUTILS.zip>

Un-compress to a temporary location accessible on the server and run the following in this order:

Run the SQLSysClrTypes.msi.msi (agree to defaults)

Then

Run the SharedManagementObjects.msi (agree to defaults)

Installing these components will give you the necessary assemblies.

OR

2. Click here: <https://www.microsoft.com/en-gb/download/details.aspx?id=30438>
Install SQL Express 2008 R2 and agree to the defaults, in doing so, it adds the required assemblies.
This can then be used for EDM if required

6.1 SQL

- ▶ The SQL Server is accessible by the V1 server you're installing on
- ▶ Ensure the "SQL Server Browser" service is started on the SQL Server
- ▶ Ensure SQL user credentials are known and this user has dbcreator permissions and you have knowledge of the instance. This does not have to be the same as Sage, but it is recommended.

7. PIA Functionality requirements

Purchase Invoice Automation (PIA) is the method by which inbound Purchase Invoices (GESPIH) or AP Supplier Invoices (GESBIS) are either scanned in or imported as PDFs or extracted as email attachments.

These Invoices are imported into the PIA queue. They go through an OCR process to be identified, matched and processed.

When accepted they are created in the Sage database and the image archived into EDM.

During the installation you will be prompted for the following details and they must be known **before** running the setup program to ensure setup is completed successfully.

PIA is only available on Windows 2012 R2 onwards and on a SQL platform, version 2008 R2 onwards.

See the Platform requirements document on the portal for more details.

NOTE: You must adhere to the same functionality requirements as EDM.

7.1 Mailbox

As standard, PIA now has the capability to poll multiple mailboxes for PDF attachments.

These attachments are automatically extracted and imported into the PIA system.

Create dedicated email addresses and supply them to your suppliers.

- ▶ Ensure you have the username and password to access these mailboxes.

8. SOA Functionality requirements

Sales Order Automation (SOA) is the method by which inbound Sales Orders (GESSOH) are either scanned or imported as PDFs or extracted as email attachments.

These orders are imported into the SOA queue. They go through an OCR process to be identified, matched and processed.

When accepted they are created in the Sage database and the image archived into EDM.

During the installation you will be prompted for the following details and they must be known **before** running the setup program to ensure setup is completed successfully.

SOA is only available on Windows 2012 R2 onwards and on a SQL platform, version 2008 R2 onwards.

See the Platform requirements document on the portal for more details.

NOTE: You must adhere to the same functionality requirements as EDM.

8.1 Mailbox

As standard, SOA now has the capability to poll multiple mailboxes for PDF attachments.

These attachments are automatically extracted and imported into the SOA system.

Create dedicated email addresses and supply them to your customers.

- ▶ Ensure you have the username and password to access these mailboxes.

9. Before running the EDM setup program

Before beginning the installation, it is best practice to run through the following bullet points to ensure the installation runs smoothly.

If any of these are missed, you risk delaying or jeopardizing a successful installation.

- ▶ All the steps and considerations of the previous chapters have been satisfied
- ▶ You have your V1 licenses to hand and they're uncompressed and accessible to the server where you are installing, in our **example** we will assume C:\EDMR13Lics
- ▶ You know the location of solution.xml / it has been copied from the Sage Application server onto the server you are installing on if you are not installing on the Sage Application Server.
- ▶ You know the Syracuse server name, port and an administrative username and password (such as admin / admin)
- ▶ You know the SQL server name and credentials of the intended SQL instance to install on
- ▶ You know the hostname or IP address of the server you are about to install on
- ▶ You know the mail server address and credentials for the inbound-delivery and outbound submission of emails
- ▶ You know the fax modem location (whether attached to the server or another server) and com port*
- ▶ You have configured all transactional and barcode printers so they are visible from File Explorer as those users

If for whatever reason any of the above are not done **STOP**.

You will encounter issues / problems down the line if you skip any of this and it will cause often lengthy delays to the project.

If you're confident everything is done, you have everything to hand you need, you're good to go to the next chapter.

**If licensed for*

10. Download Distribution and merge patch updates

All Patch releases are incremental updates over the top of the R13 distribution sharing the same file structure.

You have 2 options to get hold of the software:

1. Automatically download and merge R13 with all patches and hotfixes

An executable has been developed to 'pull down' and merge the distribution with all patches and hotfixes so you end up with the latest and greatest version.

Download it [here](#)

U: v1

P: software

Un-compress and run it.

You'll be asked some simple questions, (one of which is the path to download the software, for the purposes of this document we will assume C:\EDMR13) the end result is a distribution ready to install.

NOTE: The executable requires Windows Management Framework 5.1, an internet connection and elevated execution permissions to run.

2. Manually download and merge R13 with all patches and hotfixes

Should option 1 not be possible, you can manually merge the distribution.

You're strongly advised to watch this video:

<https://www.youtube.com/watch?v=NEm6rM4Ms8k> as a guide, but it's quite straight forward.

Navigate to the portal (<http://support.wearev1.com/software/x3/R13/>) click the Downloads > Distribution menu and download the **Distribution** (username is **v1** the password is **software**)

When downloaded, un-compress it to a temporary location, in our **example** will assume C:\EDMR13

Navigate to the portal (<http://support.wearev1.com/software/x3/R13/>)

Click the Downloads > Distribution menu and download all **Patches** (username is **v1** the password is **software**)

Once downloaded each patch zip file, un-compress the contents to a temporary directory, for example C:\R13P1, C:\R13P2, C:\R13P3 and so on.

Copy and paste the content of each in **numerical order over the top** of the distribution you uncompressed in the previous chapter, i.e. C:\EDMR13

11. Licenses explained

This is a very important chapter, please read carefully.

The setup program you are about to run will prompt for and install components based on the licenses it finds, so it is very important you **ONLY** apply those **LICENSES** expected by the project.

R13 and Patch 1

You will receive your licenses from the V1 Support team as a zip file email attachment.

R13 Patch 2 onwards

You will receive additional licenses based on the table below in a separate zip file email attachment.

Un-compress **all licenses to the same temporary location**, in our **example** we will assume C:\EDMR13Lic.

You're advised to check against the below table to ensure you have received what is expected:

R13 and Patch 1

License File	Functionality
BlobTypeManager.cal	Required to use the BLOB Type Manager
dbarchive.key	Required to use EDM
dbcapture.key	Required to use PIA and SOA
DbCaptureAdmin.cal	Required to the DbCapture Admin Client
DbCaptureClient.cal	Required to the DbCapture Interactive Client
DbConsole.cal	Required to use the DbLogin Admin Plugins
DbFax.cal	Required to use the DbFax Admin Client
DbFax.exe, dbfaxd.exe, default.id	Required to use faxing as part of EDD
Dbform.key dbform.lic DbSV.lic	Required for the scripting engine
fts.key	Required to enhance SmartRetentions
IndexManager.cal	Required to use the Index Manager
pia.key	Required to activate PIA
SmartDeposit.cal	Required to allocate and use users for SmartDeposit
SmartPortal.cal	Required to allocate and use users for SmartPortal
SmartRetention.cal	Required to allocate and use users for SmartRetentions
SmartRetrieve.cal	Required to allocate and use users for SmartRetrieve
SmartRetrieveERP.cal	Required to use the 'View Image' retrieval links in Sage
soa.key	Required to activate SOA

Patch 2 onwards

5bbedc7ead89d73b20197cf6.json	Required to activate DbCapture against the Licensing server
5bbedc8dad89d73b20197cf8.json	Required to activate SmartMailSend against the Licensing server*
5bbedc87ad89d73b20197cf7.json	Required to activate FTS against the Licensing server**

*Note this is only required if you're using SmartMailSend to distribute emails. If DbMail is being used, it's not required.

**Note this is only required if you're using FTS. If it's not being used, it's not required.

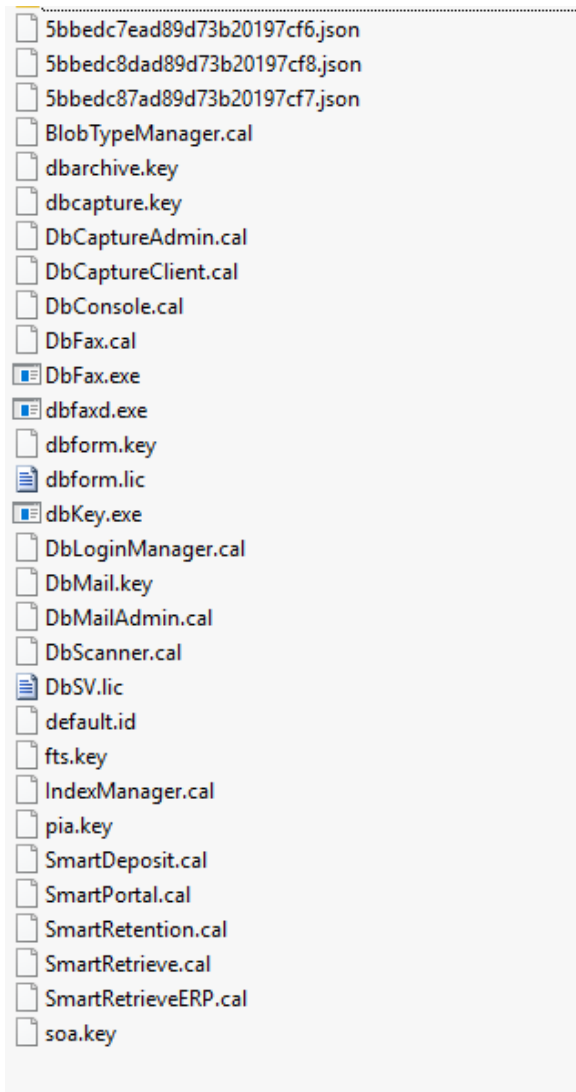
Example

If DbFax isn't purchased, you wouldn't be sent those licenses and it wouldn't be installed.

If PIA isn't purchased, you wouldn't be sent those licenses and it wouldn't be installed.

And so on.

So in our example, C:\EDMR13Lics reflects this screen shot and is an example of a complete install with EDD / EDM / PIA and SOA and **all files must be in the same directory** prior to running the setup program:



If what you have received is not what you're expecting or you're not 100% sure. **STOP.**

Contact your Sage / V1 Account Manager to verify them and if needed you will be sent new licenses.

Do not install demo licenses on a customer site as these will **expire** without warning meaning functionality will be compromised.

12. Run the setup program

1. Navigate to C:\EDMR13, right click and run setup.exe **AS ADMINISTRATOR**
2. After the initialization, you're prompted for your language, select it from the drop down, click Next >

NOTE: EDM only supports English, future release will expand on this

3. Select Server Installation, click Next >
4. A summary of your server is displayed

NOTE: If less than 7 gig of usable RAM is detected, installation will not be permitted

NOTE: If less than 10 gig of usable disk-space is detected, installation will be permitted but a warning is generated

Confirm the desired location of the server components (**avoid spaces in this path**)

Confirm the desired location of the client components to be installed on the server

When satisfied, click Next >

5. Browse to C:\EDMR13Lics and click Apply. The licenses are copied to a temporary location, analyzed and a summary of what is found is displayed at the top of the window.

13. Initial Setup

Initial Setup installs the DbLogin authentication module, prompts for the location of solution.xml, the server details of Syracuse and copies other files needed by the solution.

There are various commits to the registry which the setup program will refer to once run the first time:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\EDMR13
```

Pre-Install Task

If you are not installing EDM on the Sage Application server, either ensure the server you're on can browse to solution.xml, or copy it from there and paste it to a known location on the server where you're installing EDM.

i.e. C:\Sage\APPSERVER\folders\solution.xml

Procedure

1. Browse to the location of solution.xml
2. Complete / confirm the Syracuse server, port, username and password to use for web-service connections.

NOTE: These credentials are those you use to access Sage on the login screen, not a Sage X3 User.

You are advised to use the ADMIN Syracuse user or a dedicated Sage V1USER with an equivalent level of access and web service connections ticked.

NOTE: The Syracuse details you enter are not validated at this stage, so be very careful to ensure they are correct.

13.1 Patch 2 onwards

- a. If https is a requirement, tick the box. This means all communication between V1 Sage is done via https. It is the responsibility of the customer / host provider to ensure the certificate they want to use is in place. Further configuration is required during implementation which is covered step by step in the Server Implementation Guide.
3. When all settings are satisfied, click Install
 4. When completed, click Next >

Actions Performed

- W1\DbLogin authentication service installed and started
- W1\DbForm copied
- W1\EDDOUTBOUNDMANAGEMENT copied and paths configured
- W1\Utils copied (useful files for system management)
- Registry commits of the paths / ports thus far
- Patch 3 onwards
 - Vault is installed, initialized, un-sealed and the secrets data populated based on selections

14. EDM

Pre-Install Task

Ensure the **SQL Server Browser** service is running on the SQL Server where you intend to install EDM.

Procedure

1. Browse to the desired location of the EDM Import directory (you are advised to stick with the suggested path)
2. Confirm the polling frequency required for the service to check for EDM imports
3. Click the List button to locate the SQL instance to create the **DbArchive** database
4. Pick from the dropdown
5. Confirm the desired DSN Driver to use
6. Confirm the credentials
7. Click Test
8. If the Test completes, it will activate the Install button

NOTE: The Test button validates the SQL connection details you have provided, if it does not pass, retry entering them again. You will not be permitted to install EDM until a test is successful.

9. Click Install

NOTE: There will be short periods of apparent in-activity whilst the database and other background tasks are initialized, this is normal. Allow to finish and do not close the setup program during these periods.

10. When completed, click Next >

Actions Performed

- **DbArchive** SQL database created
- \\V1\DbArchive copied
- \\V1\DbArchive paths and ports configured based on environment
- \\V1\EDMImport paths and ports configured based on environment, service installed
- \\V1\SmartSuite\WebPortal installed
- Patch 3 onwards
 - Only where licensed for, the \\V1\SmartSuite is installed

15. Email

The EDD element for the solution will relay emails through an existing mail server. This is either Local to the server, Outlook365 or Gmail.

Procedure

1. From the dropdown, confirm the method of delivery, then click Select to lock in the selection
2. Confirm the server details depending on your selection
3. Click Install
4. When completed, click Next >

Actions Performed

- \W1\DbMail copied
- \W1\DbMail\DbMail.ini paths and ports configured based on environment
- \W1\SmartMail is installed
- If Outlook365 or Gmail is selected, stunnel is silently installed and configured based on your settings to allow the relay of emails using a hosted provider.
More details here: <https://www.stunnel.org/index.html>

Patch 2 Onwards

SmartMailSend is used as the default for relaying emails, although stunnel will still be installed, this is only used if DbMail is the configured method for emailing.

16. Fax

If you are not licensed for EDD with faxing, you will not see this option, continue to the next chapter.

Pre-Install Task

- If possible, ensure the modem is attached to the server on which you are installing. If this is not possible, ensure you know which server it is attached to. The 2 servers must be accessible to one another via an un-interrupted TCP-IP connection.

Procedure

1. From the dropdown, confirm the location of the modem, then click Select to lock in the selection
2. Confirm the server details depending on your selection
3. Click Install
4. When completed, click Next >

Actions Performed

- \\1\DbFax copied
- \\1\DbFax\bin\dbmodem.ini paths and ports configured based on environment

17. Printers

The standard solution prompts for and installs 2 printers. 1 for transactions and 1 for barcode printing.

It is possible to extend on this with implementation steps, but you are advised to start with these, get them working as per the requirements prior to adding more.

Pre-Install Task

- As per the pre-requisites, you must ensure the printers you intend to use for transactions and barcodes are shared and visible to the server where you're running the setup program.

Procedure

1. From the dropdown, confirm the path to the transactional printer to be used for an outbound document
2. From the dropdown, confirm the path to the barcode printer to be used for indexing inbound paper documents in conjunction with DbScanner.
3. From the dropdown, set the Alert value to Yes / No accordingly. The ITDEPT DbLogin user will receive an email if a print fails with details if set to Yes.
4. Click Install

NOTE: You will be prompted to specify the windows user who has these printers shared. If skipped, the service is installed a local system account.

5. When completed, click Next >

Actions Performed

- \\1\EDMPRINTMANAGEMENT copied
- \\1\Print_Pickup.def configured
- EDM Print Management service installed and configured

18. PIA

Pre-Install Task

An internet connection is required for this step. Elements of the software are downloaded and license components validated so ensure the server has a web connection.

Procedure

1. Browse to the desired location of the PIA Import directory (you are advised to stick with the suggested path)
2. Confirm the polling frequency required for the service to check for imports
 - a. If the initial setup has been ran on this server, the Syracuse details box is greyed out. This is normal and those same settings will be assumed.
 - b. If the initial setup has not been ran on this server, enter the Syracuse server, port, username and password
3. Click Install
4. ABBYY11 will be uncompressed and installed (this may take several minutes)
5. After a few moments, a server setup box will popup
 - a. If EDM has been installed on the same server, all details will be pre-populated
 - b. If EDM has not been installed on the same server, click the List button to locate the SQL instance to create the **PIA** database, confirm the username and password
6. Click the Test button to validate the details
7. When successful, click Create SQL Database, then click Next >
8. The remaining installation files are copied and configured, when completed:

R13 and R13 Patch 1

9. You are prompted to license ABBYY, click Yes. The setup program will minimize and the ABBYY License Manager loads.

NOTE: If not convenient / you haven't got it to hand, click No and you can license it manually at a later date. This is covered in the Server Administration Guide.

10. Click Activate license ...
11. Enter your ABBYY license, click Next
12. Select the option to activate via the internet
13. When licensed, close the ABBYY license manager and return to the setup program where the installation will complete.

Patch 2 onwards

14. ABBYY is licensed via the V1 License server automatically, no further action required.
15. When completed, click Next >

Actions Performed

- **DbCapture** Database created
- ABBYY11 unzipped and installed
- \DbCapture copied
- \DbCapture\defs copied and configured

19. Clients

There are a number of clients installed as part of the solution.

You are advised to install all clients on the server, although only DbScanner is designed to be used on a scan station PC, there is no harm in installing it.

Procedure

1. Confirm the server where the Initial Setup was performed (it will default to the current server you are on)
2. Click the Check button and the licenses are interrogated, after a few seconds, a list of those available will be displayed
3. Tick the boxes next to those you wish to install on the server, un-tick those you do not wish to install at this time (you can reload the setup program in Client mode at any time to install more at a later date)
4. Select whether to include desktop shortcuts
5. Click Install when ready to install all clients selected.

20. Sage Pre-Patching Tasks – Sandbox Settings

To ensure Sage X3 has access to the file structure of EDM, **a change must be made to the sandbox file.**

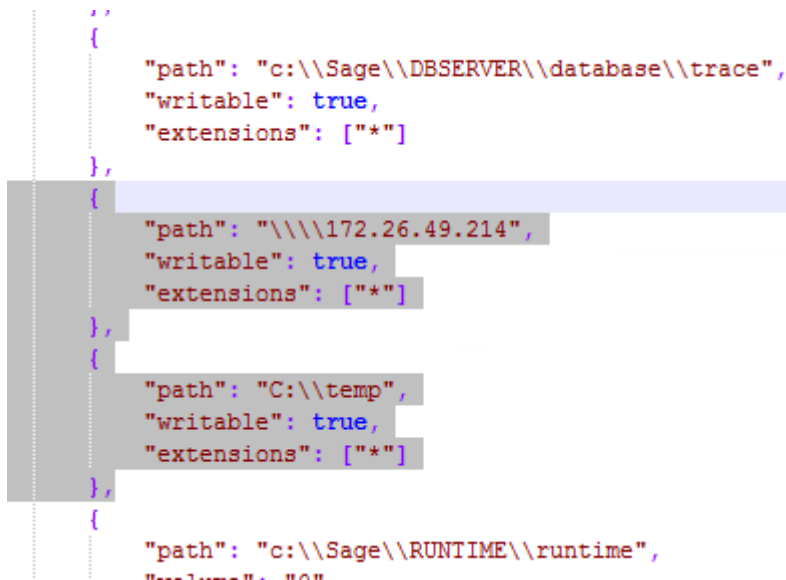
On the Sage primary runtime server, navigate to the \SAGE\<>RUNTIME>\runtime\cfg directory and take a backup of configRuntime.json.

In our **example**, we will assume the EDM server is **172.26.49.214** (you are advised to use the IP address to protect against DNS issues), change as appropriate.

Using a suitable text editor such as Notepad++, edit configRuntime.json and add this anywhere amongst the "directories":[level (note the four backslashes, this is on purpose)

```
{
  "path": "\\172.26.49.214",
  "writable": true,
  "extensions": ["*"]
},
{
  "path": "C:\\temp",
  "writable": true,
  "extensions": ["*"]
},
```

Screenshot:



```
''
{
  "path": "c:\\Sage\\DBSERVER\\database\\trace",
  "writable": true,
  "extensions": ["*"]
},
{
  "path": "\\172.26.49.214",
  "writable": true,
  "extensions": ["*"]
},
{
  "path": "C:\\temp",
  "writable": true,
  "extensions": ["*"]
},
{
  "path": "c:\\Sage\\RUNTIME\\runtime",
  "writable": true,
```

You are advised to log in and out of Sage to ensure the file is valid.

If it isn't, you will experience a parsing error, in which case re-instate your original and try again.

21. Sage Pre Patching Tasks – Interface

Repeat the following for EACH Sage Endpoint to be patched.
In our **example** we will use **SEED**, change as appropriate.

NOTE: The locations of these menus vary slightly depending on your version of Sage.

1. Login in to the Sage front screen as an admin user
2. Change / ensure your Endpoint is the **Sage SEED Endpoint** / log in to the **Sage SEED Endpoint** as ADMIN
3. Go to Development > Data and Parameters > Development Setup > Parameter Definitions (**GESADP**)
4. Where prompted enter a Module / Chapter **SUP**, press tab
5. Where prompted enter Parameter code **SPECIF**, press tab
6. Click check box **Changeable**
7. Click **Save** and Close page

22. Copy the Patches

The patches for EDM, PIA and SOA must be copied to the Sage X3 Application server so they can be applied in the traditional fashion, i.e. via the PATCH function.

In our **example**, we will assume Sage is installed in the C:\Sage directory and the Sage X3 Endpoint sub-directory is C:\Sage\APPSERVER\folders\X3 (beneath which they should be copied), **change as appropriate**:

1. From the C:\EDMR13 media, copy the contents of the \PATCH directory to your clipboard
2. Using file explorer, navigate to C:\Sage\APPSERVER\folders\X3\PATCH
3. Press CTRL+V to paste the patches to this location

NOTE: The same patches will work on either PU9, V11 or V12.

23. Apply the Patches for EDM

No patches are required for the X3 reference Endpoint.

All patches in the PATCH\EDM\PROD_ENDPOINT need be applied to all Sage Endpoints that you wish to use with EDM.

1. Login in to the Sage front screen as an ADMIN user and select the **X3 reference Endpoint**
2. Click on **Development** then on > **Utilities** > **Patches** > **Patch Integration**
3. Ensure **Server** is selected as a destination type and click the magnifying glass in the Patch cell
4. Click on the [PATCH] Patches volume and click on PATCH\EDM\PROD_ENDPOINT icon
5. Click OK
6. **Ensure to TICK Patch integration and UNTICK Deferred validation**
7. Remove the X3 reference Endpoint from the grid
8. Keep all Endpoints to be patched at this point, remove all others

MAKE SURE PATCH INTEGRATION IS TICKED AND DEFERRED VALIDATION IS UNTICKED

9. Click OK
10. Patches typically take no more than a minute or so to apply, check the log file for any issues, close the Patch function.

24. Apply the Patches for PIA

Patches are required for the X3 reference Endpoint **and** all Endpoints that wish to use PIA.

All patches in the PATCH\PIA\X3_ENDPOINT should be applied to the **X3 reference Endpoint**.

All patches in the PATCH\PIA\PROD_ENDPOINT should be applied to **all Sage Endpoints that you wish to use with PIA**.

1. Login in to the Sage front screen as an ADMIN user and select the **X3 reference Endpoint**
2. Click on **Development** then on > **Utilities** > **Patches** > **Patch Integration**
3. Ensure **Server** is selected as a destination type and click the magnifying glass in the Patch cell
4. Click on the [PATCH] Patches volume and click on PATCH\PIA\X3_ENDPOINT icon
5. Click OK
- 6. Ensure to TICK patch integration and UNTICK deferred validation**
7. Remove all Endpoints from the grid **leaving only the reference Endpoint**

MAKE SURE PATCH INTEGRATION IS TICKED AND DEFERRED VALIDATION IS UNTICKED

8. Click OK
9. Click on **Development** then on > **Utilities** > **Patches** > **Patch Integration**
10. Ensure **Server** is selected as a destination type and click the magnifying glass in the Patch cell
11. Click on the [PATCH] Patches volume and click on PATCH\PIA\PROD_ENDPOINT icon
12. Click OK
- 13. Ensure to TICK patch integration and UNTICK deferred validation**
14. Remove the X3 reference Endpoint from the grid
15. Keep all Endpoints to be patched at this point, remove all others

MAKE SURE PATCH INTEGRATION IS TICKED AND DEFERRED VALIDATION IS UNTICKED

16. Click OK
17. Patches typically take no more than a few minutes so to apply, check the log file for any issues, and close the Patch function.

25. Apply the Patches for SOA

No patches are required for the X3 reference Endpoint.

All patches in the PATCH\SOA\PROD_ENDPOINT need be applied to all Sage Endpoints that you wish to use with SOA.

1. Login in to the Sage front screen as an ADMIN user and select the **X3 reference Endpoint**
2. Click on **Development** then on > **Utilities** > **Patches** > **Patch Integration**
3. Ensure **Server** is selected as a destination type and click the magnifying glass in the Patch cell
4. Click on the [PATCH] Patches volume and click on PATCH\SOA\PROD_ENDPOINT icon
5. Click OK
6. **Ensure to TICK patch integration and UNTICK deferred validation**
7. Remove the X3 reference Endpoint from the grid
8. Keep all Endpoints to be patched at this point, remove all others

MAKE SURE PATCH INTEGRATION IS TICKED AND DEFERRED VALIDATION IS UNTICKED

9. Click OK
10. Patches typically take no more than a few minutes so to apply, check the log file for any issues, close the Patch function.

Once the patches have been applied there is an additional step required to revalidate the Entry transaction. Please refer to the next chapter.

26. Sage Post Patching tasks

PIA

Login in to the Sage front screen as an admin user

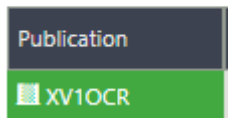
Login to each Sage Endpoint that has been patched for PIA, i.e. SEED

Repeat the following steps for **EACH** Endpoint

1. Click on Development then on > Script Dictionary > Scripts > Web services
2. In the Publication cell, select the 'Contains' search wildcard and enter XV1OCR in the cell, then press enter

[Web services](#)

 Clear filter



3. In the left list, click on XV1OCRBIS
4. Click Save
5. Click Publication
6. In the left list, click on XV1OCRPIH
7. Click Save
8. Click Publication

SOA

Login in to the Sage front screen as an admin user

Repeat the following for **EACH** Sage Endpoint that has been patched for SOA:

1. Go to Parameters / Setup the on > Sales > Entry Transactions > Orders (GESSLC)
2. In the left list, click SOA
3. Click Validation
4. You will see 2 info boxes confirming the update of DETSQHNUM and SQDLIN fields, this is normal, click Close page
5. Click on Development then on > Script Dictionary > Web services
6. In the Publication cell, select the 'Contains' search wildcard and enter XV1ORDER in the cell, then press enter
7. In the left list, click on XV1ORDER
8. Click Save
9. Click Publication

27. Shares & Directory Permissions

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

For our **example**, we will assume a path of C:\V1Home, **change as appropriate**.

EDM

1. Ensure the C:\V1Home\DbArchive\cache directory has 'Everyone' permissions write access
2. *Only if licensed for Fax*
 - a. Ensure the C:\V1Home\DbFax\spool directory has 'Everyone' permissions for write access
3. Navigate to C:\V1Home, right click on **EDMIMPORT**, click Properties
4. Click the Sharing tab
5. Click Share ...
6. Type Everyone and click Add
7. Change the permission level for Everyone to Read/Write
8. Click Share, Done, Close
9. Navigate to C:\V1Home, right click on **EDDOUTBOUNDMANAGEMENT**, click Properties
10. Click the Sharing tab
11. Click Share ...
12. Type Everyone and click Add
13. Change the permission level for Everyone to Read/Write
14. Click Share, Done, Close
15. Navigate to C:\V1Home, right click on **EDMPRINTMANAGEMENT**, click Properties
16. Click the Sharing tab
17. Click Share ...
18. Type Everyone and click Add
19. Change the permission level for Everyone to Read/Write
20. Click Share, Done, Close

PIA

1. Navigate to C:\V1Home, right click on **PIAIMPORT**, click Properties
2. Click the Sharing tab
3. Click Share ...
4. Type Everyone and click Add
5. Change the permission level for Everyone to Read/Write
6. Click Share, Done, Close

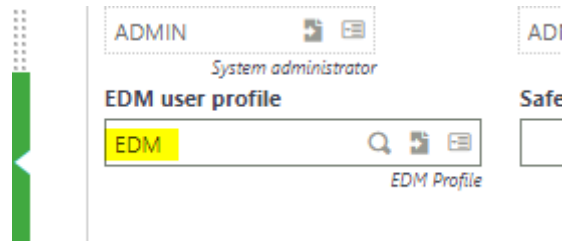
SOA

1. Navigate to C:\V1Home, right click on **SOAIMPORT**, click Properties
2. Click the Sharing tab
3. Click Share ...
4. Type Everyone and click Add
5. Change the permission level for Everyone to Read/Write
6. Click Share, Done, Close

28. Post Install Manual Tasks

For each Sage User for use with EDD, you must manually confirm / set the EDM User profile or the PDF will not be generated that ultimately gets distributed.

1. Log in to each Sage Endpoint(s)
2. Go to Setup / Parameters > Users > Users (GES AUS)
3. Click on each user who will be distributing documents
 - a. Enter **EDM** in the EDM User Profile cell, press tab, save



28.1 Patch 1 onwards

28.1.1 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:

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.

29. Post Install Checklist

Congratulations!

You have now completed the baseline installation and are advised to follow these final checks

Where applicable, in our **example**, we will assume **SEED**, change as appropriate.

EDM

- ▶ Check the DbArchive*. * and EDM*. * services are started
- ▶ Check the #USES paths in the \V1\DbArchive*.defs are the correct path
- ▶ Check the values in the \V1\DbArchive\V1_SETTINGS.def are correct

Housekeeping

When installing the solution, to minimize implementation time, a pre-configured DbLogin system is installed which includes all *potential* components.

If you *just* have EDM installed (i.e. no PIA) you are advised to remove the DbCapture Schema (dbcapture.v3.0.xsd) from the DbLogin\schemas directory to prevent possible in-activity from the server when configuring users.

Once removed, restart the DbLogin service and it will avoid this possibility.

PIA / SOA

- ▶ Check the DbCapture*. * services are started
- ▶ Check the #USES paths in the \V1\DbCapture\defs*.defs are the correct path
- ▶ Check the values in the \V1\DbCapture\defs\V1_SETTINGS_DBCAPTURE.def are correct

Sage X3

- ▶ Check the X3EDM**SEED** Classic pool is started.
It's good practice to Stop / Start the pool and ensure you get an indication channels have been assigned.

Patch 3 onwards

SmartConnect is used to communicate with Vault to retrieve sensitive environmental information, user data to establish language / email settings and the translations module.

You are advised to test each of these components with simple cmd line examples to ensure the system is responding properly.

1. Open a CMD prompt
2. CD to the C:\V1\utils\SmartConnect directory
3. Enter the following:

Vault Communication:

```
SmartConnect.exe -m VAULTGETSECRETDATA -v SAGE
```

4. Press enter
5. It should return values to stdout

User Communication:

6. Enter the following:

```
SmartConnect.exe -m QUERYUSER -n ADMIN -f DefaultLanguage
```

7. Press enter
8. It should return values to stdout

Translation Communication:

9. Enter the following:

```
SmartConnect.exe -m TRANSLATE -K DBMAIL_DEAR -v PETE -l en-int
```

10. Press enter
11. It should return values to stdout

Assuming all tests are successful, this completes the install, move on to the [Server Implementation](#) guide.