



EDM for Sage X3 Single Tenant Cloud Deployment

Sage X3 Server

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Introduction

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.

Pre-Requisites

For the purposes of this document, the following assumptions are made, change where appropriate to the actual installation:

- ▶ Sage X3 instance has been fully provisioned
 - ▶ It has a public facing URL
- ▶ The Sage X3 Endpoint to be patched is SEED
 - ▶ Change as appropriate to the actual installation
- ▶ A SMTP mail-server is available Sage can relay through
 - ▶ Email is the primary method of file transfer to V1 and shares the Workflow Parameter set in General Parameters > SUP > Workflow > SERMES
 - ▶ **NOTE: This is a very important setting, without a valid mail server, no images can be archived, so it must be proven / tested to correctly relay emails externally.**



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
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



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 > 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 > 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
-  WIN-3BPLPRB03ST:W1 : New soap classic channel created: 16116
-  WIN-3BPLPRB03ST:W0 : 1 classic channels have been created
-  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 problem and you need to contact your Sage representative to activate / purchase a web-service license.



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.

▶ Check the SPECIF parameters value is set to Yes

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



Download the patches

Click [here](#) to download the patches for both EDM and PIA.

U: v1

P: software

Un-compress to a temporary location.

Patches can be applied from any machine that can access the Sage X3 Single Tenant URL.



Apply the Patches for EDM

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

Apply them in the numerical order they are listed.

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 **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

MAKE SURE PATCH INTEGRATION IS TICKED AND DEFERRED VALIDATION IS UNTICKED

7. Click OK
8. Patches typically take no more than a minute or so to apply, check the log file for any issues, close the Patch function.
9. Repeat the above steps for each Patch



Apply the Patches for PIA

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

One patch 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**.

Apply them in the numerical order they are listed.

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 **Client** is selected as a destination type
4. **Ensure to TICK patch integration and UNTICK deferred validation**
5. Remove all Endpoints from the grid **leaving only the reference Endpoint**

MAKE SURE PATCH INTEGRATION IS TICKED AND DEFERRED VALIDATION IS UNTICKED

6. Click OK
7. Click on **Development** then on > **Utilities** > **Patches** > **Patch Integration**
8. Ensure **Client** is selected as a
9. **Ensure to TICK patch integration and UNTICK deferred validation**
10. Remove the X3 reference Endpoint from the grid
11. Keep all Endpoints to be patched at this point, remove all others

MAKE SURE PATCH INTEGRATION IS TICKED AND DEFERRED VALIDATION IS UNTICKED

12. Click OK
13. Patches typically take no more than a few minutes so to apply, check the log file for any issues, and close the Patch function.
14. Repeat the above steps for each Patch



Sage Post Patching tasks

EDM

No Action Required

PIA


Login in to the Sage front screen as an admin user

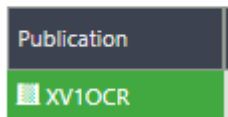
Login to each Sage Endpoint that has been patched for PIA, i.e. SEED

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



Post Install Manual Tasks

For each Sage User for use with EDM who wish to utilize the ARCHIVE destination, you must manually confirm / set the EDM User profile or the PDF will not be generated that ultimately gets archived.

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

