V1

EDM for Sage X3
Single Tenant Cloud Deployment

V1 Server

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Introduction

This quick start guide goes through the steps required to activate EDM and PIA for Sage X3 using V1's AWS environment and Sage's Single Tenant Environment.

The basic principal is the software is all already installed and as far as possible implemented.

All you have to do is 'activate' it by applying the licenses the customer has purchased, set the Sage X3 details, make minor alterations to the configuration to accommodate the customers' requirements and start the services.

Depending on what the customer has purchased, the AWS server provisioned will contain either:

- Just the EDM components. 8GB of RAM and a dual core processor.

  Or

- EDM and PIA. 16GB of RAM and a quad core processor.

This document covers activating both EDM and PIA. If your AWS server just contains the EDM components / that is all the customer has purchased, the PIA steps scan be skipped.

If your AWS server contains both EDM and PIA, then follow all steps.

Q: How do I check?
A: The easiest way to check is just to check services.msc. If you don't see these services, then there is no PIA installed and it's just EDM:

Service	Description
DbCapComms Admin Client:31451	This service is the Secondary DbCapture Communication process on port 31451. ...
DbCapComms Interactive Client:31450	This service is the Primary DbCapture Communication process on port 31450
DbCapComms Util Client:31452	This service is the Tertiary DbCapture Communication process on port 31452. For...
DbCapture OCR Server	This service controls the main DbCapture OCR process and tied to the ABBYY11 ...
DbCapture: Capture Service	This service controls the main DbCapture process
DbCapture: Export Service	This service controls the main DbCapture Export process

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Pre-Requisites

What you need from Sage

- The public URL of the Sage X3 Syracuse Single Tennant server, if you were to browse to it, you see the login screen
- The username and password of a Syracuse user with web-services connection enabled
- The name of Sage Endpoint to be patched / already patched for use with EDM / PIA

What you need from WebOps Team

- EDM
    - Remote Desktop Credentials to access to the AWS Server where the EDM solution has been pre-installed
    - SQL instance username and password credentials of AWS RDS SQL database **for the customer**
        - This will be <Customer_Name>_DbArchive as an example
- PIA
    - Remote Desktop Credentials to access to the AWS Server where the PIA solution has been pre-installed

        NOTE: This same server includes EDM as well on the same server

    - SQL instance username and password credentials of AWS RDS SQL database **for the customer**
        - This will be <Customer_Name>_DbCapture as an example

    - SQL instance username and password credentials of AWS RDS SQL database **for the customer**
        - This will be <Customer_Name>_DbArchive as an example

What you need from V1 Support Team

The licences cut for EDM / PIA for Sage X3, including ***.cal**, ***.key** and ***.json** files for the respective components.

What you need from the Customer

6 email addresses and their credentials they will use for the following file transfer methods:

- EDM

    - Archiving a transaction
    - Archiving an attachment
    - Printing a barcode
    - From address
    - EDD outbound delivery email address

- PIA

    - Receiving electronic invoices from their Suppliers

Only when you have ALL these details can you proceed.

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How to activate EDM for Sage X3 on the V1 Server

1. Using the credentials from WebOps, remote desktop to the V1 EDM AWS Server

DbLogin

2. Using file explorer, navigate to C:\V1Home\DbLogin\CALS, copy and paste all *.cal files from the licence cut

DbArchive

3. Using file explorer, navigate to C:\V1Home\DbArchive, copy and paste the dbarchive.key from the license cut
4. Using file explorer, navigate to C:\V1Home\DbArchive, using Notepad, edit the V1_SETTINGS.def
5. Edit the BASE64AUTH,,"**QURNSU46YWRtaW4=**" value (which is the Syracuse username and password encoded in Base64 with a : between them, in this example it's admin:admin for instance.)
6. Save and close the file
7. Using file explorer, navigate to C:\V1Home\DbArchive, remove the _TABLES.dat and rename _tables.ini to tables.ini
8. Go to Start > type odbc and click on ODBC Data Sources (32-bit)
9. Click on System DSN
10. Click on EDM, click Configure…
11. Enter the AWS RDS SQL Server provided by WebOps
12. Click Next
13. Ensuring the second radio button is selected and the tick box ticked, enter the SQL username and password provided by WebOps, click Next >
14. Select <CustomerPrefix>_DbArchive as the default database, click Next >
15. Click Test DataSource, click Finish
16. Using file explorer, navigate to C:\V1Home\DbArchive, using Notepad, edit the dbarchive.ini
17. Enter the same username and password for the odbc information you entered for the DSN
18. Save and close the file
19. Open services.msc and start the DbLogin service, followed by both DbArchive services then the ArchJson, V1NodeIntegration and V1WebPortal services.
20. Open Chrome and navigate to https://127.0.0.1:5002
21. Login as administrator / administrator
22. Change the URL to https://127.0.0.1:5002/config and press enter
23. Click on Configure integration server
24. Change the JDBC connection string, Database connection user and password to match the details you added when creating the DSN, click Test JDBC connection
25. Assuming a successful test, click on 'Rebuild all search indices', then scroll to the bottom, click OK
26. You should now see a login screen, this is an indication it is ready to go
27. Open the DbLogin Admin Console, create the required DbLogin Admin Users the customer wants to use and allocate the licenses for each EDM component.

EDM is now ready to use.

How to activate PIA for Sage X3 on the V1 Server

NOTE: On the assumption a customer has bought PIA they also use EDM, please complete the previous section first, and then in addition complete this section.

1. Using file explorer, navigate to C:\V1Home\SmartSuite\NIS\licenses, copy and paste the 5bbedc7ead89d73b20197cf6.json files from the license cut
2. Using file explorer, navigate to C:\V1Home\SmartSuite\SmartMail\licenses, copy and paste the 5bbedc8dad89d73b20197cf8.json files from the license cut
3. Using file explorer, navigate to C:\V1Home\DbCapture, copy and paste the dbcapture.key from the license cut
4. Using file explorer, navigate to C:\V1Home\DbCapture\DbCapBackground, copy and paste the dbcapture.key from the license cut
5. Using file explorer, navigate to C:\V1Home\DbCapture\DbCapComms, copy and paste the dbcapture.key from the license cut
6. Using file explorer, navigate to C:\V1Home\DbCapture\defs\V1_SETTINGS_DBCAPTURE.def, using Notepad, edit the V1_SETTINGS.def
7. Edit the BASE64AUTH,,"**QURNSU46YWRtaW4=**" value (which is the Syracuse username and password encoded in Base64 with a : between them, in this example it's admin:admin for instance.)
8. Save and close the file
9. Open the DbLogin Admin Console, create the required DbLogin Admin Users the customer wants to use and allocate the licenses for each PIA component

Database Confirmation

10. Using Regedit navigate to HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Version One\DbCapture Server\Database
11. Align the database details provided by WebOps with the registry keys:
    a. .NETConnectionRoot
    b. .NETConnectionToDatabase
    c. COMConnectionToDatabase
    d. DatabaseName
12. Using file explorer, navigate to C:\V1Home\DbCapture\DbCapOCRServer
13. Using a suitable text editor, open DbCapOCRServer.exe.config
14. In the `DatabaseConnection` key, align the database details provided by WebOps, save the file
15. Restart the DbCapture* services

Set Server Hosts

16. Open the DbLogin Admin Console, click on the application icon at the top of the screen
17. Click on DbCapture
18. Click Servers
19. Set the Host values for each service to be the public DNS of the AWS server it is installed on, an example is below:
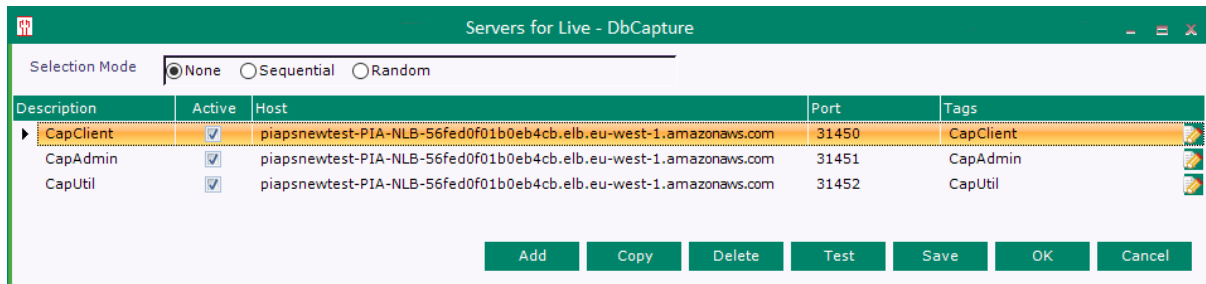
20. Click Save and OK

NOTE: The Test button will not permit a connection from the client for a Single Tenant deployment so ensure they are accurately reflected.

Set Queue States

21. Open the DbLogin Admin Console, click on the DbCapture Profile Manager icon at the top of the screen
22. Double click on PIAExpress
23. Click on the Queue States tab
24. Add your states matching the name of the Sage X3 Endpoints patched for PIA, samples are there to get you started. Ensure the first state created starts 100 to a maximum of 105.
25. When completed, click OK and close the DbCapture Profile Manager
26. For each user created who wants access adding / removing for a state:
    a. Click the tick box to the left of the user, click the keys icon at the top, click DbCapture in the tree and align the DBCStatesAllowed value(s) to the desired level of access.

PIA is now ready to use.

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How to activate EDM for Sage X3 on the Sage Server

Set Parameters

1. Using the Public URL / authentication provided, login in to Sage X3
2. Go to Setup > General Parameters > Parameter Values (ADPVAL)
3. Where prompted, enter ADX and press tab
4. Click the action button next to EDM connector and click Detail
5. Set the following values based on the information provided:

   ▶ ARCDIR
      ▶ Ensure this is "/runtime/tmp/" *note double quotes round the value*
   ▶ EDDMB
      ▶ Set the email account for use with EDD being **sent the images** to be split and distributed
   ▶ EDMARCMA
      ▶ Set the email account for use with EDM being sent the images to be archived as **attachments**
   ▶ EDMARCMF
      ▶ Set this as the **from address** to emails from EDD
   ▶ EDMARCMT
      ▶ Set the email account for use with EDM being sent the images to be archived as **transactions**
   ▶ EDMARCTYPE
      ▶ Set this to **Email**
   ▶ EDMBCPMB
      ▶ Set the email account for use with EDM being sent the **Barcodes** to be **Printed**
   ▶ EDMSERVER
      ▶ The **V1 Server name** i.e. just the DNS name, not including http/https
   ▶ EDMCONN
      ▶ Set the http/s connection method

6. Click OK
7. Click Save
8. Click Close Page

Add Links

To facilitate archiving and viewing documents from within the Sage X3 interface, links are added to those screens the customer wishes to use day to day.

Click here to consult the standard Implementation guide (the same applies for a Single Tenant Cloud Deployment) and follow the chapter 'Drilldown, Archive and Print Barcode Links'

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Scripting Considerations

When links to view either transactions or attachments are clicked, the URL is constructed by calling the following 4GL scripts in Sage which are added when the Endpoint is patched:

- XV1IMAGE
- XV1ATTACH

These scripts read the EDMCONN and EDMSERVER parameters respectively (set in the previous chapter) to know where to resolve to find the image.

The default port of the SmartSuite is 5002, so this is hard-coded, however if port forwarding is used or DNS configured in such a way the port is not included in the URL, it can be removed.

1. Using the Public URL / authentication provided, login in to Sage X3
2. Ensure to select the Endpoint patched for EDM / PIA
3. Go to Development > Script Dictionary > Scripts > Script Editor (ADOTRT)
4. Where prompted, enter the filename XV1IMAGE and press tab
5. The file should load, find references to the below:

```
URL+=""+EDMSERVER+":5002/:
```

6. Remove references to the :5002 if not required, compile.
7. Repeat this for XV1ATTACH.

You are advised to familiarize yourself with these 2 files generally as these, combined with the parameters to which they relate, allow a great deal of flexibility to how the Customers EDM behaves day to day.

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Configure SmartMail - Inbound

As a method of file transfer, emails are used to move files from the Sage X3 server to the V1 server where they are ultimately processed as configured in the previous chapter.

1. Using File Explorer, navigate to C:\V1Home\Utils
2. Right click and run **as administrator** the **start_services_debug_smartmail.bat** (this starts the V1 Smart Mail service in debug mode.

    NOTE: V1 Smart Mail can only be configured in debug mode to prevent erroneous usage

3. Open your Web Browser of choice and navigate to http://localhost:8444, this is the configuration screen

Add your inbound mail-server

Click on Add New Server
Specify a meaningful plain English description
Set the Type, Host, port and tls settings as appropriate to the provider

Add your inbound mailboxes

The following mailboxes all have a specific role and have been split accordingly based on what you are licensed to use.

NOTE: You're advised to click the dustbin icon to remove any sample mail boxes where present.

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EDD

1. Click the Add new Mailbox icon to a new mail box
2. Add an identifier of EDD
3. Ensure the Server ID is the same as the one configured
4. Enter an email address of edd@mycompany.com
5. Enter the password to access this mailbox
6. Click the box Enabled
7. In the first dropdown, select EXTRACT as the action
8. Where prompted for File extensions, enter PDF
9. Supply an Attachment path of C:\V1Home\EDDOUTBOUNDMANAGEMENT\SmartMail
10. In the dropdown below, select DELMSG
11. Click OK

EDM

1. Click the Add new Mailbox icon to a new mail box
2. Add an identifier of EDM_TRANSACTIONS
3. Ensure the Server ID is the same as the one configured
4. Enter an email address of edm_transactions@mycompany.com
5. Enter the password to access this mailbox
6. Click the box Enabled
7. In the first dropdown, select EXTRACT as the action
8. Where prompted for File extensions, enter *
9. Supply an Attachment path of C:\V1Home\EDMImport\Transaction
10. In the dropdown below, select DELMSG
11. Click OK

12. Click the Add new Mailbox icon to a new mail box
13. Add an identifier of EDM_ATTACHMENTS
14. Ensure the Server ID is the same as the one configured
15. Enter an email address of edm_attachments@mycompany.com
16. Enter the password to access this mailbox
17. Click the box Enabled
18. In the first dropdown, select EXTRACT as the action
19. Where prompted for File extensions, enter *
20. Supply an Attachment path of C:\V1Home\EDMImport\Attachment
21. In the dropdown below, select DELMSG
22. Click OK

23. Click the Add new Mailbox icon to a new mail box
24. Add an identifier of BARCODE_PRINT
25. Ensure the Server ID is the same as the one configured
26. Enter an email address of barcode_print@mycompany.com
27. Enter the password to access this mailbox
28. Click the box Enabled
29. In the first dropdown, select EXTRACT as the action
30. Where prompted for File extensions, enter TXT
31. Supply an Attachment path of C:\V1Home\EDDPRINTMANAGEMENT\BARCODE
32. In the dropdown below, select DELMSG
33. Click OK

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PIA

1. Click the Add new Server icon to add a new server. Enter your intended mail server configuration, give it a meaningful name as it will be used to identify it.
2. Click the Add new Mailbox icon to a new mail box
3. Add an identifier of PIA
4. Ensure the Server ID is the same as the one configured
5. Enter an email address of invoices@mycompany.com
6. Enter the password to access this mailbox
7. Click the box Enabled
8. In the first dropdown, select EXTRACT as the action
9. Where prompted for File extensions, enter PDF
10. Supply an Attachment path of C:\V1Home\SMARTMAILS\PIA\PDFS
11. In the dropdown below, select SAVEMSG
12. Supply a Save Message path of C:\V1Home\SMARTMAILS\PIA\EMAILS
13. Tick the middle two options, leave the first and last un-ticked
14. In the dropdown below, select DELMSG
15. Click OK
16. Click Save configuration at the bottom of the screen.

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Configure SmartMail - Outbound

Any emails relayed to users for Alerts or to Customers / Suppliers with attachments also uses V1SmartMail to relay those emails.

1. Click on Configure SMTP
2. Ensure the Normal radio button is selected
3. Click the dustbin removing any sample configuration to ensure a clean system

Add your mail server

4. Click Add New SMTP
5. Click Default SMTP
6. Enter an ID (a meaningful plain English description of the Mail Server)
7. Enter the SMTP host based on your provider
8. Enter the SMTP port based on your provider
9. If your SMTP provider requires authentication for SMTP, enter the User and Password

   NOTE: These details can be left blank if not required

10. Click Test email at the bottom
11. Enter your email address (or one you have access too)
12. Where you get a successful message and you receive the test email, configuration is complete
13. Click Save
14. Click Save smtp configuration at the bottom of the screen.
15. Close your browser
16. Go back to the CMD window you launched to start V1 SmartMail in debug mode, close the window

This completes the configuration of V1SmartMail.

Configure Vault

Q: What is Vault?
A: Vault, by [HashiCorp](#), is way to store sensitive information (such as usernames, passwords and server details) securely retrieved on demand by the integration.

These details are termed 'secrets'.

It has already been un-sealed and initialized and sample secrets added, they just need setting to align with the Sage environment spun up for this customer.

1. Using File Explorer, navigate to C:\V1Home\utils\SmartConnect
2. Using a text editor of choice, edit the appsettings.json and copy of the **RTID** value to your clipboard (the value between the quotes)
3. In your web-browser of choice, navigate to http://127.0.0.1:8200
4. When asked for a Token, paste the **RTID** value you copied to your clipboard, click Sign In
5. Click kv
6. You will now see a list of components to set / check the details for:
   a. EDM
      i. This **username** and **password** is the DbLogin user performing the majority of background tasks under the bonnet of EDM. The **v1edmserver** should stay as 127.0.0.1. Unless specific changes to the admin credentials are needed, you do not need to change these details.
   b. PIA
      i. This **username** and **password** is the DbLogin user performing the majority of background tasks under the bonnet of PIA. The **v1piaserver** should stay as 127.0.0.1. Unless specific changes to the admin credentials are needed, you do not need to change these details.
   c. SAGE
      i. This is the **username** and **password** to log in to Sage itself. The **sageurl** is the **baseline** public facing DNS of Sage X3. **NOTE: You must include a trailing slash at the end of the url, e.g. https://sageinternal.sagex3.com/**
7. If / having changed each secret, click Save

Un-Seal Vault

If the V1Vault service is restarted un-expectedly, the Vault will seal for security purposes.

SmartConnect is used to interrogate Vault for the credentials and will automatically un-seal it if it is sealed, but if there is a requirement is to manually un-seal it:

1. Using File Explorer, navigate to C:\V1Home\utils\SmartConnect
2. Using a text editor of choice, edit the appsettings.json and copy of the **UTID** value to your clipboard (the value between the quotes)
3. In your web-browser of choice, navigate to http://127.0.0.1:8200
4. When asked for a Master Key Portion, paste the **UTID** value you copied to your clipboard, click Unseal

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Implement FilterMapMaintenance

Q: What is FilterMapMaintenance?
A: An automatic way to administrate users and their access to documents in Sage X3 with no user intervention required.

Click here for the documentation which has step by step instructions and a link therein to download the files required.

Start / Restart Services

Now the system has been activated, the remaining services can be started.

It also good practice to restart those you have started during activation to ensure they respond timely.

1. Open services.msc
2. Restart DbLogin: Authentication service first, then the following in any order:
3. ArchJson
4. Db* services
5. V1* services

This completes the deployment.