



## 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

## Using EDM with AD Users

Updated – 25<sup>th</sup> October 2018

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# 1. Introduction

Intended for experienced Sage, V1 and fully trained partners **only**, this is a guide for configuring the EDM solution to work alongside AD users.

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.

## 2. Overview

**DbLogin** is the native authentication module built in to EDM which is recommended and used in the majority of cases.

DbLogin is service based and communicates with all modules of EDM using TCP-IP on port 32000. It stores all user settings as simple flat files (.xml) on the V1 Server.

It controls all accessibility and licensing.

Although compatible with AD (Active Directory) Users / authentication, out the box, R13 assumes a DbLogin user.

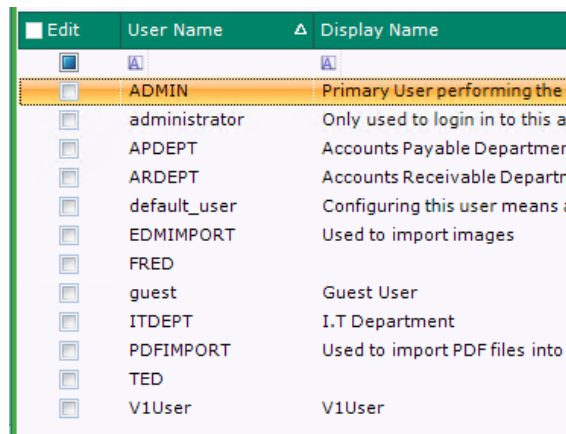
The following document will detail what changes need to be made to the out the box R13 solution and features examples of a typical configuration.

### 3. User Definition

When configuring users in EDM, there are 2 types of authentication to consider.

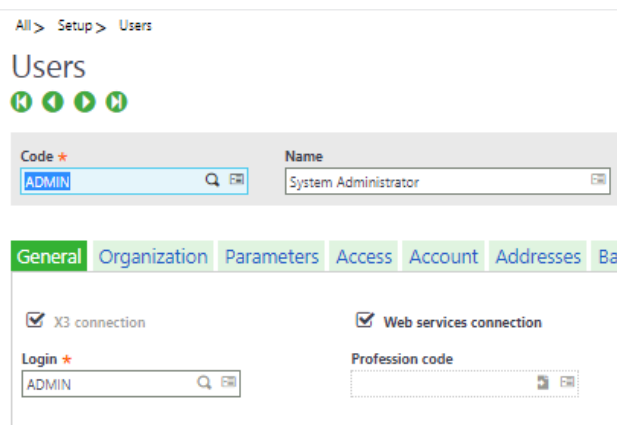
Security is the number one priority so as an add-on to Sage, understanding how it works is crucial to delivering the solution:

- ▶ The DbLogin User
  - ▶ This is the user giving access to the EDM clients and SmartSuite.



	User Name	Display Name
<input type="checkbox"/>	ADMIN	Primary User performing the
<input type="checkbox"/>	administrator	Only used to login in to this a
<input type="checkbox"/>	APDEPT	Accounts Payable Departmen
<input type="checkbox"/>	ARDEPT	Accounts Receivable Departm
<input type="checkbox"/>	default_user	Configuring this user means a
<input type="checkbox"/>	EDMIMPORT	Used to import images
<input type="checkbox"/>	FRED	
<input type="checkbox"/>	guest	Guest User
<input type="checkbox"/>	ITDEPT	I.T Department
<input type="checkbox"/>	PDFIMPORT	Used to import PDF files into I
<input type="checkbox"/>	TED	
<input type="checkbox"/>	V1User	V1User

- ▶ The Sage User
  - ▶ This is NOT the Syracuse user, but the Sage user in the GES AUS function in the classic sense.  
For PIA, you are required to have a like for like user in both DbLogin and Sage X3 with the same email address.  
This is used as a simple but effective means to validate you are the same person.



All > Setup > Users

## Users

Code \* ADMIN      Name System Administrator

General Organization Parameters Access Account Addresses Bar

X3 connection       Web services connection

Login \* ADMIN      Profession code

## 4. Permissions Definition

### 4.1 The FILTER\_MAP table

This is a special authentication table in the EDM archive called DBA\_FILTER\_MAP which gives DbLogin users access to data in Sage Endpoints.

It's configured by either the setup program, or directly adding to the SQL table.

This table contains 2 fields:

UNAME  
KEYVALUE

The UNAME is the DbLogin user  
KEYVALUE is the Sage Endpoint to which they want accessibility.

```
/****** Script for SelectTopNRows command from SSMS *****/
SELECT TOP 1000 [UNAME]
, [KEYVALUE]
FROM [DbArchive].[dbo].[DBA_FILTER_MAP] order by KEYVALUE
```

	UNAME	KEYVALUE
1	ADMIN	SEED
2	administrator	SEED
3	APDEPT	SEED
4	ARDEPT	SEED
5	ITDEPT	SEED
6	PDFIMPORT	SEED
7	V1User	SEED
8	EDMIMPORT	SEED
9	FRED	SEED
10	TED	SEED
11	ADMIN	TEST
12	administrator	TEST
13	APDEPT	TEST
14	ARDEPT	TEST
15	EDMIMPORT	TEST
16	ITDEPT	TEST
17	PDFIMPORT	TEST
18	V1User	TEST

As soon as you login to any V1 client or the SmartSuite, the FILTER\_MAP table is checked against your user against the Endpoints configured for use, these are presented in a drop down:

3 Populate fields

Sage Endpoint \*

SEED

SEED

TEST

Document Creator

administrator

So even if you're added as a DbLogin user, if you haven't been added to the FILTER\_MAP table, you won't be able to do any lookups, commit any images or use the system.

If you have been added, this accessibility gives you access to view images in SmartRetrieve and deposit images in SmartDeposit as an external user login and see the Endpoint data in PIA.

In the above example, FRED and TED have access to the SEED Endpoint, but not the TEST Endpoint.

## **4.2 DbLogin Admin Access Permissions**

The final level of security is access to document types, for instance:

TED might only want access to the Sales ledger (i.e. Orders, Invoices and Quotes)

FRED might only want access to the Purchase ledger (i.e. Orders, Invoices and Receipts)

See Chapter 6 in the [Implementation Guide](#) for more details.

## 5. Example Walkthrough Configuration

- ▶ Example configuration
  - ▶ The customer has an AD network, the domain is MYNET123
- ▶ Mandatory Pre-requisite
  - ▶ The V1 Server where EDM has been installed must have network visibility of the MYNET123 domain
- ▶ Assumptions:
  - ▶ The server where EDM is installed is called V1SERVER

### 5.1 Definition

On the V1 Server, Open DbLogin Admin console, login in as administrator / administrator  
Click on the Blue/Green con at the top  
Click on Import From External Directory  
Pull in your users

The customer have 4 users:

- ▶ MYNET123\FRED
- ▶ MYNET123\JOE
- ▶ MYNET123\BOB
- ▶ MYNET123\SIMON
- ▶ MYNET123\PETE

The customer has 3 Sage Endpoints

- ▶ SEED
- ▶ TEST
- ▶ PROD

EDM has been installed and patched on all Endpoints.

FRED and JOE are doing some testing and only require access to the TEST Endpoint

BOB and SIMON are having some training, for now only want access to SEED, but later will want access to PROD.

PETE is the I.T Manager, in charge of configuration and needs access to all Endpoints.



## 5.2 Standard Procedure

PETE logs on to the V1 Server, opens the DbLogin Admin Console and log in as the built in administrator DbLogin user.

Following the instructions in the Server Installation Guide, creates the FRED, JOE, BOB SIMON and PETE users pulled in from the MYNET123 AD system.

PETE then fires up the R13 setup program and selects the option to configure users for Endpoint access

The drop down is triggered displaying SEED, TEST and PROD, he selects SEED and clicks Select

In the left hand pane are the DbLogin users

On the right hand pane are those currently configured for the SEED Endpoint, currently empty.

- ▶ He selects the PETE, BOB and SIMON users, using the arrows move them over, clicks Save
- ▶ He picks TEST from the dropdown, clicks Select
- ▶ He selects PETE, FRED and JOE users, using the arrows moves them over, clicks Save
- ▶ He picks PROD from the dropdown, clicks Select
- ▶ He selects PETE, using the arrows moves it over, clicks Save.

*These actions have populated the DBA\_FILTER\_MAP table.*

He closes the setup program.

## 5.3 Adjustment Procedure accommodating AD

PETE opens the SQL Management Console, logs in as a user with sufficient privileges to access the DbArchive database and edit the table.

At present, the UNAME field is populated by the raw DbLogin user, this needs to be appended to include the MYNET123

```
UPDATE [DbArchive].[dbo].[DBA__FILTER_MAP]
SET UNAME='MYDOMAIN\' +UNAME
where UNAME not like '%\%'
```

(xxx row(s) affected)

**So at this point, all the DbLogin users are created and the permission to access Sage data is added to the DBA\_FILTER\_MAP table adjusted to accommodate an AD login.**

## 5.4 Test

- ▶ PETE gives it a quick test, loads his browser, and navigates to <http://V1SERVER:5002>
- ▶ He's prompted for a u/p, enters his DbLogin details as created earlier.
- ▶ He sees the SmartSuite Dashboard, clicks on SmartDeposit
- ▶ He picks the [PIH] Purchase Invoices table from the dropdown
- ▶ It loads, the first field is the Sage Endpoint and it has 3 values in the dropdown, SEED, TEST and PROD. He logs out.
- ▶ He rings FRED and asks him to do the same.
- ▶ FRED confirms he can only see the TEST Endpoint.

So, in a nutshell, the system is ready to go.

- ▶ A few weeks later, BOB and SIMON have completed their training and now want access to the PROD Sage Endpoint.
- ▶ Again, PETE fires up the R13 setup program and selects the option to configure users for Endpoint access
- ▶ The drop down is triggered displaying SEED, TEST and PROD, he selects PROD and clicks Select

In the left hand pane are the DbLogin users

On the right hand pane are those currently configured for the SEED Endpoint, currently empty.

- ▶ He selects the BOB and SIMON users, using the arrows move them over, clicks Save
- ▶ He sends them an email confirming their access has been granted.
- ▶ BOB logs in to the SmartSuite and clicks on SmartDeposit, whereas before he only saw TEST in the dropdown, he now also see's PROD.

## 5.5 Future Considerations

6 months down the line, the customer decides to invest in PIA.

PETE has been sent the relevant licences in a zip file, logs in to the V1SERVER and uncompresses them to the desktop.

Again, PETE fires up the R13 setup program and selects the option to add capability, he provides the path to the new licences and the new capability is detected.

Double checking and satisfying the pre-requisites, following the instructions in the Server Installation Guide, he installs PIA.

BOB and SIMON want access to PIA, so using DbLogin Admin console, he adds the relevant capability using the Implementation Guide as reference and sets the email address as the same one as is in the Sage workflow address for the BOB and SIMON Sage users.