



V1  
Document  
Management

## EDD for Sage X3

Electronic Document Delivery

## EDM for Sage X3

Electronic Document Management

## PIA for Sage X3

Purchase Invoice Automation

# Server Installation – R13 Patch 3 – Hotfix Bundle

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# 1. Introduction

Individual hotfixes are downloaded from the portal and are usually single files / one off procedures.

This Hotfix Bundle addresses a number of issues identified with R13 Patch 3, all of them on one delivery.

Unlike previous updates which are incremental, the R13 Patch 3 download will also be updated to include these fixes, so a fresh installation will have them out the box.

If you are already on R13 Patch 3, applying it is a straight-forward manual procedure as detailed step by step in this document.

Intended for experienced Sage, V1 and fully trained partners **only**, this is a guide for applying Hotfix Bundle against Patch 3 against the server components for:

- ▶ EDD for Sage X3
  - ▶ Bug fixes around printing
- ▶ EDM for Sage X3
  - ▶ Corrections accommodating TLS 1.2 support for SQL
- ▶ PIA for Sage X3
  - ▶ Numerous performance enhancements
  - ▶ Further defensive code accommodating any communications issues with either Sage X3 or EDM at the point of export.
    - ▶ This includes a minor enhancement adding more flexibility on how documents are created in Sage X3 and EDM.

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 already updated R13 with Patch 1, Patch 2 **and Patch 3**, follow this document in full to apply the Hotfix Bundle.

## 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, Patch 2 AND Patch 3** have already been applied.
- ▶ Ensure **no users are using any of the EDD / EDM / PIA modules** when applying the Hotfix Bundle.
- ▶ The Hotfix Bundle has been downloaded to C:\temp\P3HFB.zip from the portal and un-compressed to C:\temp\P3HFB

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

### 3. EDD

DMI-3719

If an erroneous PDF is copied into the \EDMPRINTMANAGEMENT\TRANSACTION directory, it causes the process to return an error until the next tick to check for a printout.

To correct this:

1. Open services.msc and stop the 'EDM Print Management service'

*NOTE: No print outs will be lost whilst the service is stopped, any printout generated will still be present, but only print when the update applied, and service re-started.*

2. Using File Explorer, navigate to C:\temp\HFBP3\EDMPRINTMANAGEMENT\ and take a copy of the Print\_Pickup.def
3. Using File Explorer, navigate to D:\Sage\EDM\EDMPRINTMANAGEMENT\ and take backup of Print\_Pickup.def, i.e. Print\_Pickup.def.Patch3
4. Paste in place the new Print\_Pickup.def copied from the HFBP3 directory
5. Using a suitable text editor, edit Print\_Pickup.def and set the 2 variables at the top: (you can get these values from your backup)

```
#USES "D:\\Sage\\EDM\\DBARCHIVE\\V1_SETTINGS.DEF"  
VARIABLE=EMAILITDEPTONFAILURE,, "0"
```

6. Save and close the file.
7. Go back to services.msc and start the 'EDM Print Management service'

This completes the procedure applying the hotfix bundle to EDD.

## 4. EDM

DMI-3927

To support TLS 1.2, the ODBC Driver used by EDM to connect to its database may require re-installing depending on your system architecture.

The following will guide you through the process allowing you to choose an updated driver.

1. Using file explorer, navigate to the C:\temp\P3HFB\utils dir, run the msoledbsql\_x64.msi agreeing to the defaults
2. Click Start > type in "ODBC Data Sources (32-bit)" and click it
3. Click on the System DSN tab
4. Take note of the name X3EDM\_DSN\_CONNECTION (you'll need it shortly), click on and click Remove, click Yes to confirm
5. Click on Add...
6. From the list, select Server Native Client 11.0
7. Click Finish
8. Where prompted, re-add the name X3EDM\_DSN\_CONNECTION and again for the description
9. Select the instance\database used by EDM
10. Click Next
11. Select the SQL authentication option
12. Enter the SQL username and password used to authenticate the connection, click Next
13. Check the box "Change the default database" and select DbArchive
14. Click Next
15. Click Finish
16. Click the Test Data Source button and if the tests completes, click OK

This completes the procedure applying the hotfix bundle to EDM.

## 5. PIA

DMI-4121

The most significant improvements come with PIA, including numerous performance enhancements (reducing the time a document takes to validate when clicking the Check button), extra options for adding / removing debugs, better handling of exceptions and a new field allowing flexibility on how a document is created in Sage X3 and archived in EDM.

- ▶ Before applying the hotfix bundle, ensure your DbCapture queue is *clear* of all documents.
  - ▶ Although it is technically possible to apply the update retrospectively, there are risks of documents being lost / corrupted if still in the queue.
- ▶ Before applying the hotfix bundle, ensure all users are logged out of all DbCapture clients.

NOTE: If any be-spokes have been added to the system since the original deployment of the standard, they will be lost and must be manually retrofitted back in.

1. Go to services.msc and stop all DbCapture\* services
2. Using file explorer, navigate to D:\Sage\EDM\DbCapture\Profile dir and take a backup / rename PIA\_Express.dbcp to PIA\_Express.dbcp.preHFB1
3. Using file explorer, navigate to D:\Sage\EDM\DbCapture\defs dir and take a backup / rename PIAExpress\_VALIDATE.def and PIAExpress\_EXPORT.def file adding .preHFB1 as a suffix
4. Using file explorer, navigate to C:\temp\P3HFB\DbCapture\Profile and copy PIAExpress.dbcp to D:\Sage\EDM\DbCapture\Profile
5. Using file explorer, navigate to C:\temp\P3HFB\DbCapture\defs and copy the defs to D:\Sage\EDM\DbCapture\defs
6. Using a suitable text editor, add the following content to the **D:\Sage\EDM\DbCapture\defs\V1\_SETTINGS.def**

```
;Decide whether to execute timers while calling Sage X3 web-services for  
calculating total time consumption for each web-services.
```

```
;0 = It will not execute Timer  
;1 = It will execute timer.
```

```
VARIABLE=DEBUGMODE,, "0"
```

7. Save the file
8. Using a suitable text editor, edit the following value in both the PIAExpress\_VALIDATE.def and PIAExpress\_EXPORT.def's aligning with the installation path:

```
#USES="D:\\Sage\\EDM\\DBCAPTURE\\DEFS\\V1_SETTINGS_DBCAPTURE.DEF"
```

9. Save the files

10. Open a DOS prompt and CD to the D:\Sage\EDM\DbCapture\DbCapComms dir
11. Enter the following command all on one line:

```
DbCapComms.exe -debug 31499 -queueupdate
```

12. When completed, close the cmd window
13. Re-open services.msc and re-start all the DbCapture\* services

This completes the procedure applying the hotfix bundle to PIA.

Below is a summary explaining the new scenarios now supported.

A new field is now present in the DbCapture Profile named "Upload Type".

This field allows flexibility on how and where documents are processed, primarily based on duplicates that are found.

The new field will be a drop down and will contain up to three values:

- ▶ Create in Sage X3 and Archive
  - ▶ The default, if no duplicates are found in either Sage X3 or EDM
- ▶ Create in Sage X3 Only
  - ▶ If there is no requirement to archive the document in EDM, just create it in Sage X3
- ▶ Archive Only
  - ▶ Activated if a duplicate is found in Sage X3

All of the above can be overridden manually, but pre-selected based on the duplication settings and most likely scenario.

Test Scenarios:

- ▶ **Scenario 1**
  - ▶ If the invoice has been created in Sage X3, but failed to archive in EDM, in this case if re-opened, the Archive Only option will be offered. When accepted, it will just archive the image against the existing transaction in Sage X3.
- ▶ **Scenario 2**
  - ▶ If the invoice has been created in Sage X3 AND archived, the usual message informing the user of a duplicate is displayed and it's severity dependent on the options in V1\_SETTINGS.def
- ▶ **Scenario 3**
  - ▶ If the invoice is neither created in Sage X3 or archived, the default option will be presented to Create in Sage X3 And Archive, but also the option to Create in Sage X3 Only.

. A warning message will be displayed explaining the each scenario when displayed to the user.



## 6. 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 MAXATTACHMENTSIZ variable to decide the maximum size of attachment (in MB's) to email failed documents.  
VARIABLE = MAXATTACHMENTSIZ, , "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.

## 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 CURRENCYSTOCHECK = " GBP|USD|EURO|CHF|£|$|€"
LET PASSPIHDIRECTTAX = "0"
LET PASSPIHPOPTAX = "0"
```