Sage | Sage X3 Certified Solution

V1 Document Management

EDM for Sage X3 by V1

Electronic Document Management

PIA for Sage X3 by V1

Purchase Invoice Automation

SOA for Sage X3 by V1

Sales Order Automation

Release 12.1

FAQ – Adding a non-standard document type

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Contents

1. Introduction

This document describes the steps required to add a new document type to the EDM system and where appropriate, activate the facility to distribute it via email / fax / print.

Mandatory assumptions:

▶ EDM for Sage X3 R12.1 is installed and tested
▶ The Sage X3 application server is named SAGEX3APPSERVER
▶ EDM for Sage X3 has been applied to the SEED Folder / Endpoint
▶ The path for the EDM server components is c:\v1

You are encouraged to bookmark the Portal which is regularly updated with information about the release:

http://support.wearev1.com/software/x3/X3EDMHELP/index.htm

To give context to adding your new document type, the following describe how the two processes for archiving and distribution actually work.

Although this document does provide high level details on the steps required to add to the standard solution, typically V1 would perform this type of procedure as a professional services engagement.

Using the portal, raise a change request with any details of specific capability requirements.

1.1   How the ARCHIVE process works

First included in the core Sage X3 code in V6.5 patch 12, the 'EDM Connector' was added to do two things:

- ▶ Archive a document from within the Sage X3 interface
- ▶ Retrieve a document that has been archived from within the Sage X3 interface

The integration components added for major releases since then have extended on this to include scanning, OCR and outbound delivery of documents, but the EDM connector is still used today.

The process is as follows:

- ▶ A transaction is printed to the ARCHIVE destination
- ▶ The action of doing this creates a PDF copy in the c:\temp directory on the Sage X3 application server
- ▶ A process in the Sage X3 Folder / Endpoint patched for EDM (XV1SPEARC) runs a simple batch file which takes this PDF and reading the soap files present in \v1\Process\<FOLDER>\<FOLDER>X3LOOKUP.soap authenticates the lookups required
- ▶ A simple payload file (sendfile.txt) is created with the tags for the table, this in turn is passed to the EDM archive, the fields are populated and the PDF is archived in the EDM database.

1.2 How the AUTO / distribution process works

The principal is quite straight forward. Take a copy of a standard report, meaningfully name it XV1_<STANDARDREPORTNAME>AUTO (all reports must be suffixed AUTO and prefixed XV1_), add tags to it which are read by the EDM system and it is then processed.

These tags tell the system whether to email / fax / print, the BP, the Sage X3 object and transaction number.

More detail on how to do this is in the Crystal Report Changes document, the following process describes how it operates:

> ▶ When printing a supported transactional document to the AUTO destination, a PDF copy of the transaction is copied to the c:\temp directory on the Sage X3 application server
> ▶ Because this PDF contains the hidden 'tags' added to identify it, a process in the Sage X3 Folder / Endpoint patched for EDM (XV1SPEARC) runs a simple batch file in the \v1\DBPDF directory RunPDF.bat which is given parameters by XV1SPEARC such as folder name, user and location of PDF.
> ▶ This in turns runs a binary DBPDF.exe which chops up the PDF based on the tag information distributing the document accordingly
>> ▶ If we assume 100 documents distributed as a batch, a single PDF is created in c:\temp which is then chopped up in to the 100 separate documents as individual PDF's
> ▶ The same batch file then passes the output from DBPDF.exe (an individual PDF and a tag file*) to DBPDF.def** along with the parameters it's extracted. Using this information, DBPDF.def distributes the document whether by email, fax or printing it based on the tag information.
> ▶ Because the distribution process uses the same output type as ARCHIVE (Archiving) the PDF is also archived against the corresponding Sage X3 object, but this is handled by the external scripting language DbForm*** and by the scripting files V1X3_XV1<OBJECT>.def in the \V1\DbArchive directory.
> ▶ The end result of this is exactly the same as if the document was just archived, but as described it is ALSO distributed and no pre / after archiving screen is displayed.

The following detail step by step how this all fits together, the end result is a new document type not in standard that will both archive and distribute via email / fax / print.

*A tag **file** contains the field data present in the crystal report extracted to accompany the PDF with the same name, so for instance a PDF named ADMIN.001.pdf will also have a ADMIN.001.tag to go with it.*

As with any *.def file, knowledge of DbForm* is required to interpret the values and add the relevant sections to accommodate the new document type.*

2. Create your new Archiving Parameter

2.1   What is an Archiving Parameter?

An archiving parameter (also termed document type) in terms of EDM is a transactional table in the EDM database where images are stored and retrieved from, i.e Sales Invoice, Purchase Invoice etc ..

The document types as displayed in Sage X3 adopt a naming convention beginning V1 followed by the Sage X3 object, so a Sales Invoice document type is V1SIH, a Purchase Invoice document type is V1PIH etc ..

The standard EDM solution contains 16 document types that match the most commonly used Sage X3 objects and many customers use them requiring no more. However, it is quite normal to want additional ones not present in the standard.

The following describes how to first create your new Archiving Parameter.

We will use the OPP object as our **example**, for all other new document types, simply reflect the Sage X3 object you wish to add:

NOTE: Ensure to only use alphanumeric characters for Parameter codes and titles. Underscores are also permitted.

- ▶ Log in to the Safe X3 Client / Browse to the Sage X3 login screen as ADMIN and select the production folder / Endpoint where EDM has been installed
- ▶ Load the GESADI function
    - ▶ (Development > Data and Parameters > Miscellaneous Tables > Data)
- ▶ In the Table cell, enter 902 and press tab
- ▶ Scroll to the bottom
- ▶ Double click in the last empty Code cell and enter V1OPP, press tab
- ▶ Add a description of Projects
- ▶ On the next line, double click in the Code cell and enter V2OPP, press tab
- ▶ Add a description of Bulk Projects
- ▶ Click Save, End / Close Page
- ▶ Load the GESARE function
    - ▶ (Parameters / Setup > Destinations > Archiving Parameters)
- ▶ You'll see the list of currently setup standard document types. You are advised to take a copy of one then add / remove the fields you wish to have.
- ▶ Click V1SIH (a good baseline)
- ▶ In the Document Type cell, type V1OPP, press tab
- ▶ Click Create, click Yes when prompted for Copy confirmation
    - ▶ There will be a brief pause whilst processing
- ▶ Your new document type V1OPP is now created. As per the screenshot below, you are advised to reflect these fields:

	Parameter code	Parameter title	Internal type	Argument type
1	DBA_FILTER_FIELD	Sage ERP X3 Folder	Character	By Value
2	OPP_NO	Project Number	Character	By Value
3	DOC_CREATOR	Document Creator	Character	By Address
4	SUB_DATE	Submission Date	Date	By Address
5	TRANS_COMP	Company	Character	By Value
6	TRANS_SITE	Site	Character	By Value
7	TRANS_TYPE	Type	Character	By Value
8	BPC_CODE	Customer Code	Character	By Value
9	OPP_DES	Description	Character	By Value
10	SALES_REP	Sales Rep	Character	By Value
11	OPP_CAT	Category	Character	By Value
12	OPENING_DATE	Opening Date	Character	By Value
13	CONCLUSION_DATE	Conclusion Date	Character	By Value
14	EST_AMOUNT	Estimated Amount	Decimal	By Value
15	DOC_KEY	Document Key	Character	By Value
16	DOC_ID	Document ID Returned	Character	By Address
17	REV_NUMBER	Revision Number	Character	By Address
18				

Document type V1OPP Projects
Volume identifier ONE Version One Master Container

NOTE: The fields **highlighted** are mandatory for every Document Type.

Ensuring no users are logged in to any of the V1 clients, restart both of the DbArchive services on the Sage X3 Application server having created a new Archiving Rule to commit the change.

3. Create your new Archiving Rule to archive documents

3.1 What is an Archiving Rule?

An archiving rule dictates the behavior of your new Document Type.

Again the following is using our **example** OPP, change the values as appropriate.

- ▶ Load the GESARC function
    - ▶ (Parameters / Setup > Destinations > Archiving Rules)
- ▶ Again you'll see the list of currently setup standard archiving rules. You are advised to take a copy of one then add / remove the data you wish to use for each field. Click on V1SIH
- ▶ In the Archiving code cell, enter V1OPP and press tab
- ▶ Reflect the screen shot as follows on the General Tab:

- ▶ Click the Parameter definition tab and using the formula wizard, for each field with an argument type of **Value**, populate the field with the required data.
    - ▶ NOTE: The DBA_FILTER_FILED needs a value of nomap
- ▶ When the formulas have been set, click Create, click Yes when prompted for Copy confirmation (There will be a brief pause whilst processing)

4. Create your new Archiving Rule to distribute documents

Assumptions:

▶ A corresponding V1<SAGEX3OBJECT> archiving rule has been created
▶ A Crystal Report has been created and properly tagged as per the instructions in the Crystal Reports FAQ document
▶ The Crystal Report has been copied to the X3\REPORTS\<LANGUAGE> directory
▶ EDM for Sage X3 R12.1 is installed and tested
▶ The Sage X3 application server is named SAGEX3APPSERVER
▶ EDM for Sage X3 has been applied to the SEED Folder / Endpoint
▶ The path for the EDM server components is c:\v1

Whilst a V1<SAGEX3OBJECT> controls the archiving of document, a V2<SAGEX3OBJECT> controls it's distribution.

A V2<SAGEX3OBJECT> requires no parameters so is very easy to create:

▶ Load the GESARC function
    ▶ (Parameters / Setup > Destinations > Archiving Rules)
▶ Again you'll see the list of currently setup standard archiving rules. You are advised to take a copy of one then add / remove the data you wish to use for each field. Click on V2SIH
▶ In the Archiving code cell, enter V2OPP and press tab
▶ Browse for your new report in the Report Code cell, press tab
▶ Change the Document Type to V2OPP, press tab
▶ Click Create / Save / Post

NOTE: During testing, you are advised to tick the 'Debug mode' tick box for the archiving rule(s) as this will give high level indication of the files being processed once the destination has finished processing it. Remember to untick this prior to go live!

5. Aligning the Print Parameters

Assumptions:

- ▶ All previous steps have been completed
- ▶ The new report is called XV1_OPPOR1AUTO

The print parameters of the new report must be aligned to the standard version.

So for example, OPPOR1 is the standard report parameter for the OPP object, you need to create OPPOR1AUTO report and align the 2 parameters so they both share the same behavior.

- ▶ Login to Sage X3 as an ADMIN user in to the Folder / Endpoint patched for EDM
- ▶ Navigate to Development > Processes > Script Dictionary > Reports (GESARP)
- ▶ In the Report Code cell, enter OPPOR1 and press tab
- ▶ Replace the text with OPPOR1AUTO, press tab
- ▶ Change the Destination to AUTO
- ▶ Browse for and change the Crystal Report to be the XV1_OPPOR1AUTO report you have added tags too
- ▶ Click Create

6. Add to print codes

Assumptions:

▶ All previous steps have been completed

So that the new report is available in the list on the transaction when printed, it must be added as a print code.

▶ Go to Parameters / Setup > Destinations > Print Codes
▶ Scroll to the last line and as per our **example**, enter OPPOR as the internal code, press tab.
▶ Enter a print code of OPPOR1AUTO, press tab

It will now be available when clicking the print button / icon from with Sage X3 in the OPP object / transaction.

7. Add to default values

Assumptions:

▶ All previous steps have been completed

So that the new report is available in the list on the transaction when printed, it must be added as a print code.

▶ Login to Sage X3 as an ADMIN user in to the Folder / Endpoint patched for EDM
▶ Navigate to Parameters / Setup > Destinations > Default Values (GESARV)
▶ In the Function cell, enter GESOPP and press tab
▶ Ensure the Print Type is Reports, press tab
▶ In the Reports cell, enter OPPOR1, press tab
▶ This will show all the default values passed by the printing of the document. Take a print screen of this.
▶ Change the Reports call to read OPPOR1AUTO, press tab
▶ Using your print screen as a reference, enter the same values as the default
▶ Create / Save

Your new document type is ready and can be archived and where documented, ready to distribute.