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 - Minimum Platform Requirements

Updated - 14 September 2017

Contents

1. Introduction

This document specifies the minimum platform requirements of the EDM for Sage X3 R12.1 system.

- ▶ Sage X3 Application Server
- ▶ Mail Server
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- ▶ Scanner Hardware / Software Recommendations
    - ▶ PC Workstation
- ▶ Barcode Printer

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

2. Server Hardware Requirements - EDM

The `core` EDM Settings include the authentication module (DbLogin) and a file repository (DbArchive) to store the scanned / imported images.

The minimum requirements for an **Application Server** to run the core EDM components are:

Component	Specification
Processor	Dual Core
RAM	8 GB
Operating Systems	Windows 2008 up to 2012 Server 32 or 64 bit.
Disk Space	165 Megabytes
LAN	Min 100MB LAN to clients

The minimum requirements for the Database Server to run the core EDM components are:

SQL Server	2008 R2 or higher
Oracle Server	Windows only 11g (12c is NOT supported)

*Average image size is 60K – 100K per page: 20,000 pages per year = 2GIG of hard drive space. Installed to a SQL database preferably on the same server as the Sage X3 installation.

For example, the installation program must be run on a Windows 2008 > 2012 application server, but the database server can be either of the following:

- SQL, on the same server as the application server
- SQL, on a different server to the application server
- Oracle, on windows, on the same server as the application server
- Oracle, on windows, on a different server as the application server*

*Ensure the Oracle Client Libraries are present on the Application Server before attempting an install.

For optimal performance, the preferred combination is a Windows 2012 Application server with a SQL 2012 instance on the same server.

3. Server Hardware Requirements - PIA / SOA

The `core` PIA / SOA Settings include the authentication module (DbLogin), a file repository[*] (DbArchive) to store the scanned / imported images, an OCR module (ABBYY) and the services necessary to process images (DbCapture).

The OCR process is very processor and memory intensive so if the minimum specification (or better) is not adhered to, the installation will experience performance and reliability problems.

The minimum requirements for a **server** to run the core PIA / SOA components are:

Component	Specification
Processor	Quad Core (at least 2 cores dedicated @2.4GHz)
RAM	16 GB
Operating Systems	Windows 2012 Server 32 or 64 bit.
Disk Space	1.16 Gigabytes
LAN	Min 100MB LAN to clients
SQL Server only	2008 R2 or higher

*Average image size is 60K – 100K per page: 20,000 pages per year = 2GIG of hard drive space. Installed to a SQL database preferably on the same server as the Sage X3 installation.

4. Scanstation PC Hardware Requirements

A scanstation is a dedicated PC workstation with a dedicated scanner attached for batch scanning.

4.1   PC workstation

At least a dual core processor machine with Windows 7 or later preferably 64bit with at least 4GB memory. For high speed production scanners more memory may be required. Please refer to the scanner manufacturers recommendations.

A USB 2.0 or 3.0 port is required to attach a workgroup scanner.

The PC should have enough at least 10GB of hard disk space PLUS enough space for at least two months' worth of scanning. The documents are stored permanently in the repository on the server, but there are temporary backups on the scanstation to help in the event of a server failure.

A large screen is beneficial for checking the quality of scanned documents. Since most documents scanned tend to be portrait, a conventionally proportioned screen may be better than a wide-screen model.

4.2   Scanner

A dedicated A3 duplex scanner, such as a Kodak i3200, is recommended. For optimum results when using barcode recognition, a copy of Kofax VRS Elite 5.1 is recommended. The edition of VRS should be matched to the scanner. Most of the recommended scanners require the Workgroup Edition."

5. Viewing Images

EDM for Sage X3 by V1 has a component launched within the Sage X3 interface (or externally if required) which is self-contained within the file structure of the system on port 31491 and on the Sage X3 Application Server. E.g.

http://APPSERVER:31491/V1

It allows images scanned / imported into the Sage X3 system to be viewed via a web browser.

Component	Specification
Web Server Provided	Apache 2.2.15

You are advised to use Chrome and install the following extension for an optimal viewing experience:

6. Email Settings

Documents which use the AUTO / EMAIL / EMAILONLY destination in Sage X3 can be distributed via email. In order to do this dbmailsend.exe must be allowed to *relay* through an existing mail server.

The minimum requirements for a server to allow mail relaying for EDM are:

Component	Specification
Mail Server	Supporting SMTP* delivery or MAPI Hosted Outlook 365 Hosted Gmail
Mail Client	Outlook 2003 Onwards

* Authenticated SMTP supported and configured during installation by clicking Advanced on the mail setup stage. See Installation document.

7. Fax

Documents which use the AUTO / FAX / FAXONLY destinations in Sage X3 can be distributed via fax.

The minimum requirements for a server to allow fax relaying for EDM are:

Component	Specification
Analogue Phone Line*	Accessible via the modem present on the Sage X3 Application Server to be used or a server connected to it.

* If a number is to be dialled to get an outside line, this is configured during the installation process. See installation instructions.

7.1   Fax modem

To send faxes from EDM for Sage X3 by V1, it requires a fax class 2 modem.

Note that there is a difference between the class 2 and the class 2.0 – the class 2.0 is not supported.

Additionally, the US Robotics class 2 fax modem is not supported.

V1 specifically recommend and support the following hardware:

MultiModem® ZDX desktop (model no. MT5656ZDX) – details are available at
http://www.multitech.co.uk/en_US/PRODUCTS/Families/MultiModemZDX/

This is a simple plug and play device and is available generally in the US, Canada and UK. It is also available and supported globally through a network of local distributors – find your local agent here: http://www.multitech.com/en_US/PRODUCTS/info/find_a_distributor/

8. Scanning and Hardware

In order to scan images into the system barcodes must be produced, attached to the document and scanned into the file repository. From here they can be accessed from any user authorised to use the system.

The recommendations to allow image processing for EDM are:

Component	Specification
Scanner	Kodak recommended*
Barcode Printing	Desktop or Network Connected Zebra GKD 420d
Barcode Labels	Type A 55mm x 32mm**
Image Format	TIFF Grp IV 300dpi resolution
MFD	TIFF Grp IV 300dpi resolution

*For more details on scanning requirements, please see the documentation on the portal under the section 'Platform and Hardware Requirements > Scan Station'.

8.1 Barcode Printer

Zebra GKD 420d

Printer is connected to USB port on a user workstation, or on a network print server device on any computer on the network (including Sage X3 server).

8.2 Barcode Labels

Larger barcodes can be used (to accommodate longer transaction numbers).

8.3 Transactional Printers

Printers must be 'PDF enabled', so assuming printing from the command line:

copy mypdf.pdf \\myprintserver\mysharedprinter

Produces the result:

1 file copied.

The PDF prints to the printer specified.

9. Sign Off

Representative	Date	Signature
V1 Project Manager		
Customer		
Sage Partner (if applicable)		