



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 – Server Pre-Installation Checklist

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1. Introduction

This document describes the pre-installation steps which must be in place / known prior to installing the server components on the Sage X3 Application server.

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

<http://support.wearev1.com/software/x3/>

Do not proceed unless all of the following are satisfied or you will compromise a successful deployment.

You cannot skip any steps in this document.

1.1 Firewall

The following binaries must be added to a whitelist / Firewall exceptions / Windows smart screen:

DbLoginServer.exe

DbLUQuery.exe

DbMailSend.exe

DbCSQuery.exe

DbFaxd.exe

DbFaxSend.exe

▶ If SQL: DbCSArchiveServerSQL.exe

▶ If SQL: DbCSArchiveServerSQLRead.exe

▶ If Oracle: DbCSArchiveServerOracle32.exe

▶ If Oracle: DbCSArchiveServerOracle64.exe

DbCapCommsPrimary.exe

DbCapCommsSecondary.exe

DbCapCommsTertiary.exe

DbCapCommsUpdate.exe

Ensure the firewall on the Sage X3 Application server opens the following ports:

32000

31417

31418

31491

31450

31451

31452

2. Mail Functionality requirements for EDD

Electronic Document Delivery (EDD) is the method by which outbound documents (such as Sales Invoices) are emailed either singularly or in batch directly from Sage X3.

During the installation you will be prompted for the following details and they must be known **before** running the setup program to ensure setup is completed successfully.

- ▶ You have details of the customer's mail server configuration
 - ▶ POP3 or hosted by Outlook365 / Gmail
 - ▶ Server address
 - ▶ Server authentication
 - ▶ Administrative email
 - ▶ This email address is one who will be informed of activities on the server, so the I.T department for instance.

3. Fax Functionality requirements for EDD

Electronic Document Delivery (EDD) is the method by which outbound documents (such as Sales Invoices) are faxed either singularly or in batch directly from Sage X3.

During the installation you will be prompted for the following details and they must be known **before** running the setup program to ensure setup is completed successfully.

- ▶ You have details of the customer's fax modem configuration
 - ▶ COM port

4. Printing Functionality requirements for EDD

Electronic Document Delivery (EDD) is the method by which outbound documents (such as Sales Invoices) are printed either singularly or in batch directly from Sage X3.

During the installation you will be prompted for the following details and they must be known **before** running the setup program to ensure setup is completed successfully.

- ▶ Ensure the transactional printers and barcode printer(s) to be used are shared and visible to the Sage X3 application server. They must be shared as the **Sage X3 runtime user account**

For example, when logged in to the Sage X3 Application server as the Sage X3 runtime user, if opening Windows File Explorer and enter \\PRINTSERVER\ the printer(s) are visible.

5. EDM Functionality requirements

Electronic Document Management (EDM) is the method by which inbound or outbound documents are archived into the EDM database. These documents are either then accessible from within the Sage x3 interface, or externally via a dedicated viewer.

5.1 SQL

In order to use some of the enhanced features of the setup program, the following assemblies must be present on the server that runs the setup program:

C:\Windows\assembly\Microsoft.SqlServer.Smo Version 10.0.0.0

If you do not have these assemblies on the server you are installing EDM on, there are 2 ways to sort it out:

1. Click here: <https://www.microsoft.com/en-gb/download/details.aspx?id=30438>
Install SQL Express 2008 R2 and agree to the defaults, in doing so, it adds the required assemblies.
This can then be used for EDM / PIA if required

OR

2. If you already have a SQL instance you want to use, but don't have the assemblies on the server
Click here: <https://www.microsoft.com/en-us/download/details.aspx?id=16978>
Click on Install Instructions.
Install the package Microsoft® System CLR Types for SQL Server® 2008 R2
Install the package Microsoft® SQL Server® 2008 R2 Shared Management Objects

▶ The Sage X3 database server is accessible by the Sage X3 Application server.
▶ Ensure the "SQL Server Browser" service is started on the database server

Ensure the SQL user credentials are known and you have knowledge of the instance.
This does not have to be the same as Sage X3, but it is recommended.

5.2 Oracle

- ▶ If an Oracle installation, a **X3EDMDB** database **MUST** be created already and the authentication details known and tested.
- ▶ Only 11g is supported, consult the Oracle Support document for more information.

6. PIA Functionality

Purchase Invoice Automation (PIA) is the method by which inbound Purchase Invoices or AP Invoices are either scanned or imported as PDFs.

These Invoices are imported into the DbCapture clients, the information on them goes through an OCR process to be identified, matched, processed and when accepted, created in the Sage X3 database (GESPIH / GESBIS) and the image archived in the EDM database.

During the installation you will be prompted for the following details and they must be known **before** running the setup program to ensure setup is completed successfully.

PIA is only available on a SQL platform.

6.1 SQL

- ▶ The Sage X3 database server is accessible by the Sage X3 Application server.
 - ▶ Ensure the “SQL Server Browser” service is started on the database server
 - ▶ Ensure the SQL user credentials are known and you have knowledge of the instance. This does not have to be the same as Sage X3, but it is recommended.

NOTE: Although Windows authentication is an option during installation, it is recommended to use SQL Authentication and either use sa, or an account with dbowner and sysadmin privileges. You are advised to use the SQL Management console to test the login prior to installation.

6.2 Mailbox

As standard, PIA now has the capability to poll a mailbox for PDF attachments. These attachments are automatically extracted and imported into the PIA system. You are advised to create a dedicated email address and supply this to your suppliers.

- ▶ Ensure you have the username and password to access this mailbox.

7. SOA Functionality

Sales Order Automation (SOA) is the method by which inbound Sales Orders are either scanned or imported as PDFs.

These Orders are imported into the DbCapture clients, the information on them goes through an OCR process to be identified, matched, processed and when accepted, created in the Sage X3 database (GESSOH) and the image archived in the EDM database.

During the installation you will be prompted for the following details and they must be known **before** running the setup program to ensure setup is completed successfully.

SOA is only available on a SQL platform.

7.1 SQL

- ▶ The Sage X3 database server is accessible by the Sage X3 Application server.
 - ▶ Ensure the “SQL Server Browser” service is started on the database server
 - ▶ Ensure the SQL user credentials are known and you have knowledge of the instance. This does not have to be the same as Sage X3, but it is recommended.

NOTE: Although Windows authentication is an option during installation, it is recommended to use SQL Authentication and either use sa, or an account with dbowner and sysadmin privileges. You are advised to use the SQL Management console to test the login prior to installation.

7.2 Mailbox

As standard, SOA now has the capability to poll a mailbox for PDF attachments. These attachments are automatically extracted and imported into the SOA system. You advised to create a dedicated email address and supply this to your customers.

- ▶ Ensure you have the username and password to access this mailbox.