



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 – Transactional Attachments

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Contents

1. Introduction	3
2. What is a Transactional Attachment?.....	4
2.1 What if I want to add more that are not in the standard?	4
3. Activating the Transactional Attachment Capability	5
3.1 Import the New Table into the EDM Database.....	6
3.2 Apply the patch	7
3.3 Adding a View Attachment Button to a Window.....	8
3.4 Copy the script for lookups	9
4. Test.....	10
5. Appendix	11
5.1 Add a new Transactional Document Type	11
5.2 Amend the Sage X3 Process	12
5.3 Republish the web-services.....	13
5.4 Amend the scripting files	14

1. Introduction

Introduced as a new feature of EDM for Sage X3 by V1 Release 12 as standard, the capability can be added to an existing R11.1 system independently without the need to update the whole release.

This document covers the following:

- ▶ Explaining how the Transactional Attachment functionality works
- ▶ I have R11.1 and want to add the Transactional Attachment capability without updating to R12.1
- ▶ I have updated to R12.1 and want to add Transactional Attachment capability

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. What is a Transactional Attachment?

In standard EDM, a document can be archived in several different ways:

- PRINT to the ARCHIVE destination
- Produce a barcode, affix to your paper copy and scan in using DbScanner
- PRINT to the AUTO destination which distributes AND archives the document
- Using the Enclosures functionality
- Using OCR to create an Invoice in Sage X3 (which in addition to creating the document also indexes the image against the Invoice)

If however you wish to archive a document which *relates* to the transaction (such as an email, notes, a drawing, photograph etc ...) but not the transaction itself, you can use the new Transactional Attachment capability of EDM.

When archived, the attachment can be viewed from the same screen as the transaction linking the two together saving time finding everything that relates to it.

The standard documents that support Transactional Attachments are:

- ▶ Purchase Invoices (GESPIH)
- ▶ Purchase Orders (GESPOH)
- ▶ Sales Invoices (GESSIH)
- ▶ Sales Orders (GESSOH)

2.1 What if I want to add more that are not in the standard?

Contact your Sage Partner to request a professional services engagement, adding a supplementary document take takes no more than an hour. Consult the Appendix for a high level guide for those with the skillset required.

3. Activating the Transactional Attachment Capability

The installation is in 5 simple steps which can be done in any order, but you are advised to perform them as follows:

- Import the new table into the EDM database
- Apply the patch
- Adding a View Attachment button to a Window
- Copy the script file for lookups*
- Test

If all goes well it will take no more than 10 minutes to complete.

*This only needs to be performed if you have an existing R11.1 system and not updated to R12.1.


3.1 Import the New Table into the EDM Database

Assumptions:

- ▶ The EDM for Sage X3 by V1 Release 12.1 distribution is located in D:\R12DISTRIB on the Sage X3 Application Server


1. On the Sage X3 Application Server, open the DbLogin Admin Console
2. Log in as an administrative user

3. Click the  icon (DbArchive Table Editor)

4. Click the  icon (Import from XML)

5. Browse to D:\R12DISTRIB\DbArchive\ATT and select tables.xml

6. After a brief pause you should see a new table appear, V1X3_V1ATT Transactional Attachments

7. Click the  icon (Reorder Tables) and reorder so it appears in alphabetical order / in a position of your preference.

NOTE: This order is how it will display for DbDeposit users and in DbWebQuery

8. Click OK when satisfied
9. Close the DbArchive Table Editor
10. Close DbLogin Admin Console

3.2 Apply the patch

Assumptions:

- ▶ The folder / Endpoint where EDM for Sage X3 by V1 capability has been added to is called PROD
- ▶ The R11.1 installation has been completed and the post installation check list has been satisfied
- ▶ The R12.1 distribution is located in D:\R12DISTRIB on the Sage X3 application server
- ▶ The Sage X3 installation is installed to the D:\SAGE\SAGEX3APPSERVER

1. Log in to the Sage X3 reference folder as an administrative user
2. For V6.5:
 - a. Browse to D:\R12DISTRIB\PATCH\v6\EDM\1.FILPAT_EDMFOLDER\ and select X3EDM_0120010_12_160.dat
 - b. Ensure to tick Patch Integration and UN tick deferred validation
 - c. Remove all but the PROD folder from the grid
NOTE: Leave in any other folders you also wish to patch for
 - d. Click OK
3. For PU8:
 - a. Copy D:\R12DISTRIB\PATCH\v6\EDM\1.FILPAT_EDMFOLDER\ X3EDM_0120010_12_180.dat to D:\Sage\SAGEX3APPLICATION\folders\X3\PATCH
 - b. Load the PATCH function
 - c. Browse to D:\Sage\SAGEX3APPLICATION\folders\X3\PATCH and select X3EDM_0120010_12_180.dat
 - d. Ensure to tick Patch Integration and UN tick deferred validation
 - e. Remove all but the PROD Endpoint from the grid
NOTE: Leave in any other Endpoints you also wish to patch for
 - f. Click OK
4. For PU9:
 - a. Copy D:\R12DISTRIB\PATCH\v6\EDM\1.FILPAT_EDMFOLDER\ X3EDM_0120010_12_190.dat to D:\Sage\SAGEX3APPLICATION\folders\X3\PATCH
 - b. Load the PATCH function
 - c. Browse to D:\Sage\SAGEX3APPLICATION\folders\X3\PATCH and select X3EDM_0120010_12_190.dat
 - d. Ensure to tick Patch Integration and UN tick deferred validation
 - e. Remove all but the PROD Endpoint from the grid
NOTE: Leave in any other Endpoints you also wish to patch for
 - f. Click OK

3.3 Adding a View Attachment Button to a Window

Assumptions:

- ▶ The folder / Endpoint where the EDM capability has been added to is called PROD
- ▶ The installation / update has been completed and the post installation check list has been satisfied

In order to add the View Attachment button to a Sage X3 window, perform the following steps per window per folder / endpoint.

For the following example, we will use Sales Invoices (GESSIH).

Repeat this process for any of the following standard transactions which are supported by default:

Purchase Invoices (GESPIH)
Purchase Orders (GESPOH)
Sales Invoices (GESSIH)
Sales Orders (GESSOH)

Adding the button to the Window

1. Log in to the Sage X3 Client / Sage X3 front screen as ADMIN (or equivalent user)
2. Navigate to Development > Processes > Windows (GESAWI)
3. In the Window cell at the top of the screen, enter OSIH and press TAB (O the letter not the number)
4. Click the Button/Menu tab
5. Scroll to the bottom and double click in the first available blank cell in the Type column
6. Select the option "Button", press tab
7. In the Code column cell, enter the letter "z", press tab. If this letter is already used by another button/menu, choose a letter that is not.
8. Select non validating, press tab
9. In the Button Text cell enter the designation View Attachments, press tab (click New Text when prompted)
10. In the Action column, enter XV1ATTACH, press tab
11. In the Activity column, enter the activity code X3EDM. This will protect your changes from being overwritten.
12. Click Save
13. Click Validation, you are being asked to confirm the validation, click Yes

Revalidating the entry transaction

1. Navigate to Parameters (Setup) > Sales > Entry Transactions > Invoices (GESLI)
2. Click on each entry transaction, when highlighted click the Validation button

3.4 Copy the script for lookups

Assumptions:

- ▶ The installation / update has been completed and the post installation check list has been satisfied
- ▶ The R12.1 distribution is located in D:\R12DISTRIB on the Sage X3 application server
- ▶ The R11.1 installation is located in the C:\V1 directory




In order to do lookups to populate the EDM database with searchable information necessary to link to a transaction, a script is needed on the Sage X3 application server.

1. Navigate to D:\R12DISTRIB\DbArchive\Defs\ and copy V1X3_V1ATT.def
2. Navigate to C:\V1\DbArchive and paste the file in this location
3. Edit the file in any text editor
4. Find the value [V1PATH] and replace it with C:\\V1\\ (note the double back slashes)
5. Save the file

4. Test

Assumptions:

- ▶ All previous steps have been performed
- ▶ The Sage X3 Folder / Endpoint where the Transactional Attachment capability has been applied is PROD
- ▶ DbDeposit has been installed

1. Log in to the Sage X3 Client / Sage X3 front screen as ADMIN (or equivalent user) selecting the PROD Folder / Endpoint
2. Navigate to Sales > Invoices > Invoices (GESSIH)
3. Copy any Sales Invoice reference to your clipboard
4. On any client machine or the application server, login to DbDeposit as a user who has access
5. Using the dropdown (just beneath the 3 dotted button to browse for a file) find and select the Transactional Attachment table
6. You will be prompted to firstly confirm the Sage X3 Folder / Endpoint you wish to commit an attachment too
7. Select the Document Type, in this Test, select Sales Invoice
8. In the Transaction Number cell, paste your Sales Invoice reference in the clipboard
9. Click the Execute lookup  button to populate the remaining fields
10. Browse to a file by clicking the  button or drag and drop a file over the DbDeposit interface
11. Click the Archive Document button  to archive the file
12. Return to the Sales Invoice transaction in the Sage X3 interface, click the View Attachment button / link your attachment will be displayed

5. Appendix

5.1 Add a new Transactional Document Type

Assumptions:

- ▶ All previous steps have been performed
- ▶ The Sage X3 Folder / Endpoint where the Transactional Attachment capability has been applied is PROD
- ▶ DbDeposit has been installed
- ▶ You have familiarity with 4GL and the Sage development environment
- ▶ You have familiarity with DbForm

5.2 Amend the Sage X3 Process

In our example, we will add support for Sales Quotes, change the following as appropriate:

- ▶ Log in to PROD Folder / Endpoint
- ▶ Open the Script Editor (ADOTRT)
- ▶ Open the process XV1COMMON_ATT
- ▶ Find the subprogram TRANSLIST
- ▶ Add the following case:

```
When "5"  
If clalev([SQH])=0 : Local File SQUOTE [SQH] : Endif  
CRITERE="instr(1,toupper([SQH]SQHNUM), toupper(SEARCH))>0"  
  For [SOH] Where evalue(CRITERE)  
    CODE(I) = [SQH]SQHNUM  
    I += 1  
  If I>=MAXNUM:Break:Endif  
Next
```

- ▶ Find the subprogram LOOKUPTRANSDATA
- ▶ Append the following case (for each field match those found in the V1SQH archiving rule):

```
When "SQH"  
  If clalev ([SQH])=0 : Local File SQUOTE[SQH] : Endif  
  Raz [F:SQH]  
  Read [SQH]SQH0=CODE  
  If !fstat  
    ITRANCOMP= [SQH]SALFCY  
    Etc ..  
  Endif  
Endif
```

5.3 Republish the web-services

When changing a process in Sage X3 that is linked to a web-service (as in the case of all lookups in EDM for Sage X3 by V1), it is best practice to re-publish them and restart the Pool Alias to which they relate.

- ▶ Restart the X3EDM<POOLALIAS>
- ▶ Log in to the Sage X3 production Folder / Endpoint patched as ADMIN
- ▶ Navigate to Development > Script Dictionary > Scripts > Webservices (GESAWE)
- ▶ Find XV1ATTDLU, click on it, click Publication
- ▶ Find XV1ATTLU, click on it, click Publication

5.4 Amend the scripting files

- ▶ Add a line to the \V1\DbArchive\trans <LANG>ui.txt files
Sales Quotes
- ▶ In the \V1\DbArchive directory, open V1X3_V1ATT.def and edit as follows:
 - ▶ In the REFORMAT=LOOKUP_REFORMAT section, add a line beneath:
PRINT_LINE "DOC_TYPE:"+TRANSFILEUI[10]+""
To read
PRINT_LINE "DOC_TYPE:"+TRANSFILEUI[11]+""
 - ▶ Copy the code beginning
else if DOC_TYPE = ""+TRANSFILEUI[10]+"" then
and within the same {} block paste it, changing it top then read
else if DOC_TYPE = ""+TRANSFILEUI[11]+"" then
In your new block change
call execute("echo ^<FLD NAME=\"CRIT\"^>4^</FLD^> etc ..
To read
call execute("echo ^<FLD NAME=\"CRIT\"^>5^</FLD^> etc ..
In your new block change
call execute("echo ^<FLD NAME=\"OBJ\"^>SOH^</FLD^> etc ..
To read
call execute("echo ^<FLD NAME=\"OBJ\"^>SQH^</FLD^> etc ..
 - ▶ Save the file
- ▶ You are now advised to log in and out of DbDeposit and follow the testing procedure for Sales Quotes.