

EDM for Sage X3 R12.1

Pre-Installation Customer Information

Updated - 07 April 2017

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Introduction

The following information must be completed by the client / Sage X3 partner who have implemented the Sage X3 installation to ensure the V1 Project can proceed.

**Before proceeding, a mandatory assumption is that the Platform Requirements document has been reviewed.**

Sage X3 Application Server

The V1 installation must be on the same physical server as the Sage X3 Application server.

|  |  |  |
| --- | --- | --- |
| **Item** | **Please Complete** | **Notes** |
| Server Name/IP address |  |  |
| Virtual / Physical Server |  | e.g. Virtual |
| Server Specification |  | e.g. RAM/ Processor |
| Operating System |  | e.g.  Windows 2012 R2 |
| SQL Tools installed on the Sage X3 database server  (If a SQL installation) | i.e. SQL Management Studio |  |
| Location of tnsnames.ora  (If an Oracle installation) |  |  |
| Sage X3 Version |  |  |
| Sage X3 Patch Level |  |  |
| Print Server | i.e. [\\PRINTERSERVER](file:///\\PRINTERSERVER) |  |
| Sage X3 runtime user credentials  (if applicable) |  | U: .\x3run  P: sage123 |
| Installation drive for the V1 components |  |  |
| Mail Server Name |  |  |
| Mail Server Authentication |  |  |
| Mail boxes(s) to polled for PDF attachments  (PIA / SOA only) |  |  |
| Mail boxe(s) user / pass  (PIA / SOA only) |  |  |
| Remote Server Access method |  | e.g. VPN / WebEx – details to be provided |

Sign Off

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

Sage X3 Environment

The following are specific details about the Sage X3 Environment.

Given that the EDM solution is an ‘add-on’, Sage X3 must be in a UAT or preferably LIVE state that the customer can advocate *prior* to the implementation:

|  |  |  |
| --- | --- | --- |
| **Item** | **Please Complete** | **Notes** |
| Sage X3 Test Folder / Endpoint |  |  |
| Sage X3 / Syracuse Login for Test Folder / Endpoint |  |  |
| Sage X3 Production Folder / Endpoint |  |  |
| Sage X3 / Syracuse Login for Production Folder / Endpoint |  |  |
| Batch Server activated / permitted |  |  |
| Location of solution.xml |  |  |
| Location of poolgetdef\_reply.xml (if applicable) |  |  |
| Has the screen / window behind the GESBIS function been modified beyond standard? |  |  |
| Has the screen / window behind the GESPIH function been modified beyond standard? |  |  |
| Has the screen / window behind the GESSOH function been modified beyond standard? |  |  |

Sign Off

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

V1 Clients

There are a number of clients used day to day by users to allow them utilize and administrate all the features of EDM for Sage X3:

|  |  |  |
| --- | --- | --- |
| **Item** | **Please complete** | **Note** |
| Client PCs operating system |  | e.g. Windows 8 |
| Admin username / password |  | Most local users should have local admin rights or will have it provided |
| Number of clients to be used |  | Based on licensed clients |
| Microsoft .NET Framework 3.5 installed |  | Yes / No |
| DbScanner Scan station Operating System |  | e.g. Windows 8 |
| All scanner hardware available. Firewire connection for certain scanners |  | Yes / No |
| Admin username / password |  | To be confirmed during install |
| Scanstation on same network as servers |  | Yes / No |
| Scanstation has internet access (for license registration) |  | Yes / No |
| Remote PC Access method |  | VPN / WebEx – details |

Sign Off

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

Scanners / Printers

A scanner is technically an optional component as images can be imported via other means, however if the customer receives paper copies of Invoices / other documents and intend to add barcodes to index them they will require a scanner or multi-function device.

|  |  |  |
| --- | --- | --- |
| **Item** | **Please complete** | **Note** |
| Scanner Make / Model and number re / MFD? |  | e.g. 3 Kodak i1405’s |
| Scanner is on site (delivered) |  | Yes / No |
| Connectivity to scanstation |  | Normally Usb |
| Barcode recognition / Kofax VRS (per scanner) has been received |  | If procured by V1 then VRS is standard |
| Printers to use are PDF enabled | i.e. if you ‘copy test.pdf [\\printserver\printer](file:///\\printserver\printer)’ a PDF is printed |  |

Sign Off

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

Server / Client Communication Details

The following table is for reference and information with regards to the individual modules and setting required for those modules.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Item** | **Port** | **Protocol** | **Bi-direction** | **Source** | **Destination** |
| DbCSArchive server | 31417 | TCP | Yes | V1 Server | Client PCs |
| DbCSArchive server | 31418 | TCP | Yes | V1 Server | Client PCs |
|  |  |  |  |  |  |
| DbWebQuery | 31491 | HTTP | Yes | V1 Server | Client PCs |
|  |  |  |  |  |  |
| DbCapture | 31450 | TCP | Yes | V1 Server | Client PCs |
| DbCapture | 31451 | TCP | Yes | V1 Server | Client PCs |
| DbCapture | 31452 | TCP | Yes | V1 Server | Client PCs |
|  |  |  |  |  |  |
| DbMail | 25\* | SMTP | Yes | V1 Server | Mailserver |
|  |  |  |  |  |  |
| Scan Station | 31417 | TCP | Yes | Client PC | V1 Server |
| Scan Station | 31418 | TCP | Yes | Client PC | V1 Server |
| Scan Station | 32000 | TCP | Yes | Client PC | V1 Server |
|  |  |  |  |  |  |
| DbLogin | 32000 | TCP | Yes | Client PC | V1 Server |
| UNC Accessibility to Sage X3 Application Server |  | | | | |

*\*This is dependent on the type of mail connectivity*

Sign Off

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

Final Sign off

When all the previous sections have been satisfied, the following sign offs are a requirement to begin a project:

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