sage | Sage X3 Certified Solution

V1
Document
Management

EDM for Sage X3 by V1

Electronic **D**ocument **M**anagement

PIA for Sage X3 by V1

Purchase **I**nvoice **A**utomation

SOA for Sage X3 by V1

Sales **O**rder **A**utomation

Release 12.1

Quick Start Server Installation Guide

Updated - 14 December 2017

Contents

1. Introduction

Intended for experienced Sage X3 and V1 engineers, this is a quick start guide for installing EDD / EDM / PIA / SOA for Sage X3 by V1 Release 12.1.

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

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

On the portal this document is complimented by videos which walk you through the installation and patching procedures.

Do not proceed unless the Server Pre-Installation Checklist has been satisfied in full or you will compromise a successful deployment.

2. Sage X3 Pre Installation Tasks

Before installation, there are a number of steps required that must be performed so that the patches will apply correctly and the solution will function as expected.

The following tasks assume the Sage X3 **SEED** Folder / Endpoint, but they must be performed for *each* Sage X3 Folder / Endpoint you intend to install against.

These instructions cover Sage X3 V6.5 / PU8 / PU9 / V11 so terminology is mixed to accommodate all variations, but the principals are the same.

▶ **Sage X3 SEED Folder / Endpoint must be set as Changeable**

1. Change / ensure your Folder / Endpoint is the **Sage X3 SEED Folder / Endpoint** / log in to the **Sage X3 SEED Folder / Endpoint** as ADMIN
2. Go to Development > Data and Parameters > Development Setup > Parameter Definitions (**GESADP**)
3. In the Module / Chapter cell, type **SUP** and press tab
4. In the Parameter cell, type **SPECIF** and press tab
5. Tick the box for **Changeable**
6. Click Save
7. Click End / Close Page

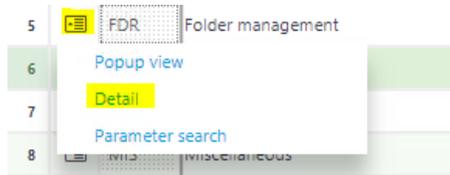▶ **Sage X3 SEED Folder / Endpoint must be set as Specific**

1. Change / ensure your Endpoint is the **Sage X3 Folder / SEED Endpoint** / log in to the **Sage X3 SEED Folder / Endpoint** as ADMIN
2. Go to Setup / Parameters > General Parameters > Folders (**GESADS**)
3. In the left list, click the **SEED** Folder / Endpoint
4. Tick the box for **Specific folder**
5. Click Save

   NOTE: You may be warned regarding activity codes, in which case:

   - Click the Options tab
   - Change the Page size dropdown to display 500 records (to make it easier to find the activity code(s) warned about)
   - Locate the activity code(s) stipulated in the warning message(s) and set them to **No**
   - Click Save
   - Repeat these steps until you are able to click Save without a message

6. Click End / Close Page

▶ **The SPECIF parameters value must be set to Yes**

1. Change / ensure your Folder / Endpoint is the **Sage X3 SEED Folder / Endpoint** / log in to the **Sage X3 SEED Folder / Endpoint** as ADMIN
2. Go to Setup / Parameters > General Parameters > Parameter Values (**ADPVAL**)
3. In the Chapter cell, type **SUP** and press tab
4. Click the action button and click detail

5. Set the **SPECIF** value to be **Yes** (if it already is **Yes**, no action required)
6. Click OK
7. Click Save
8. Click End / Close Page

▶ **Access rights from the Sage X3 reference Folder / Endpoint to all Sage X3 production Folders / Endpoints**

1. Change / ensure your Endpoint is the **Sage X3 reference Folder / Endpoint** / log in to the **Sage X3 reference Folder / Endpoint** as ADMIN
2. Go to Setup / Parameters > General Parameters > Folders (**GESADS**)
3. In the left list, click the **X3** Folder / Endpoint
4. Click the **Links** tab
5. Ensure the **SEED** folder is given a value of **All** in the Access to rights to the Folder section:
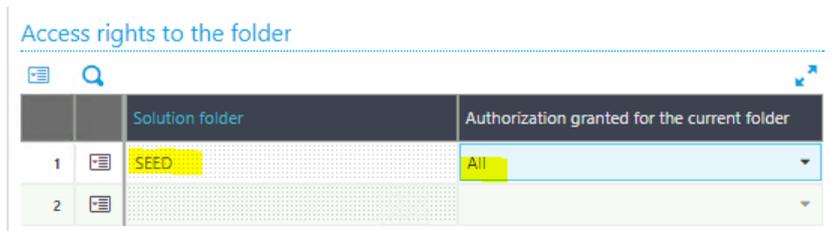
6. Click Save
7. Click Close Page

▶ **PU8 / PU9 / V11 only - Create the EDM Storage area**

1. Change / ensure your Endpoint is the **Sage X3 reference Endpoint** / log in to the **Sage X3 reference Endpoint** as ADMIN
2. Select Usage > Usage > X3 Storage Areas (**AVOLUME**)
3. Click **Create**
4. Enter a Volume of **EDM**
5. Enter a Description of **EDM Storage Area**
6. Enter a Root of **C:\Temp**
7. Click Save
8. Click Close Page

3. Web Service Connectivity Configuration

In order that EDM for Sage X3 by V1 can interface with Sage X3, a pool alias must be configured for each Sage X3 Folder / Endpoint to be used.

There are two methods to do this based on the version of Sage X3:

Adding connection 'pools' to the SAFE X3 console and Apache:
- Sage X3 V6.5
- Sage X3 PU8

Adding connection 'pools' by way of the Sage X3 using Syracuse and the ClassicPool:
- Sage X3 PU9
- Sage X3 V11

The R12.1 setup program will prompt you for the following file:

<WEBSERVER>_ **poolgetdef_reply.xml**

This file is generated by the SAFE X3 console when creating pools and is used to identify which are to be used in conjunction with EDM for Sage X3 by V1.

If using Sage X3 V6.5 or PU8, continue to 3.1.

If using PU9 / V11 and the SAFE X3 console is available for pool configuration, continue to 3.1.

If using PU9 / V11 and the SAFE X3 console is not available (as it is not a pre-requisite to have an Apache web-server with PU9 / V11), continue to the next page.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<x3webadmin>
        <reply>
                <data id="poolgetdef">
                        <admreply request="GetPoolDef">
                                <entries format="console" id="244295617">
                                        <pool.def.alias>X3EDMSEED</pool.def.alias>
                                        <pool.def.adxfolder>SEED</pool.def.adxfolder>
                                        <pool.def.language>ENG</pool.def.language>
                                        <pool.def.userid>ADMIN</pool.def.userid>
                                        <pool.def.ospassword></pool.def.ospassword>
                                </entries>
                        </admreply>
                </data>
                <status>ok</status>
                <starttime></starttime>
                <elapsedtime></elapsedtime>
                <log id="WEB_X3PU9ADCSRV_poolgetdef">
                        <filepath></filepath>
                        <enabled></enabled>
                        <nbmaxfiles></nbmaxfiles>
                </log>
                <messages nb="0"/>
                <error/>
        </reply>
</x3webadmin>
```

Copy and paste the above in to a file called **poolgetdef_reply.xml** and where applicable, replace the text **in red** with your actual values.

Q: Why am I having to do this?
A: As R12.1 has to support many versions and combinations of Sage X3, so numerous updates and changes can be avoided, manual steps are added to these instructions prior to the next major release. This is an example of one of those steps and will not be required for the future releases of EDM / PIA / SOA.

Once you've created your file, continue to 3.2.

3.1 SAFE X3 Console Configuration

If you're on PU9 or V11 and have manually created your poolgetdef_reply.xml, you do not have to do this step and can continue to 3.2.

NOTE: Ensure you have sufficient web-services licenses for the number of Sage X3 Folders / Endpoints required.

They must be meaningfully named using the following naming convention:

X3EDM<FOLDER>

So if you have a Sage X3 Folder called SEED, it must be named **X3EDMSEED**.

Assumptions:

▶ All Folders / Endpoints you wish to use are published for the webserver

1. Load the SAFE X3 console
2. Click the Web servers button
3. Click on the Globe with the name of the web server next to it
4. Click the web services icon at the top right of the screen

Repeat these steps for each Sage X3 Folder / Endpoint you wish to use with EDM:

5. Click the + next to the folder / Endpoint to which EDM will be applied. This will open the folder next to the blue cog icon. Single click the Add button which appears above the Web Services window.
6. A new dialogue box opens below this screen, confirm the details in it as follows (double click in each Value cell to enter information)

- Enter a pool alias name in the pool.def.alias cell. It must be named using a standardised naming convention; it must begin **X3EDM** followed by the Sage Folder name, so a Sage X3 Folder called **SEED** must have a pool alias called **X3EDMSEED**.
- pool.def.language = ENG
- pool.def.userid = ADMIN
- pool.def.password (leave this blank)
- pool.def.osuserid = sage
- pool.def.ospassword = sage
- pool.def.maxsize = 1
- pool.def.initsize = 1

7. Click the Apply button beneath the Publications icon at the top of the screen

If the pool has started successfully, an icon will now be present beneath the blue cog with a green tick. (A red cross signifies that one of the settings has been rejected. In this case, consult your system administrator, check the setting used and correct any differences. When corrected click Apply.) When you have a green tick configuration is completed.

3.2   Sage X3 PU9 / V11 – ClassicPool Configuration

In order that EDM can interface with Sage X3 PU9 / V11, a classic SOAP pool must be configured for each Sage X3 Endpoint to be used *in addition* to those configured in the SAFE X3 Console (or if this is not possible using the example file provided).

They must be meaningfully named using the following naming convention:

X3EDM<ENDPOINT>

So if you have a Sage X3 Endpoint called SEED, it must be named **X3EDMSEED**, if you have an Endpoint called TEST, it must be named X3EDMTEST and so on.

SEED will be used in the following example, change as appropriate to represent the Endpoint(s) to be used in conjunction with EDM / PIA / SOA.

1. Navigate to the Sage X3 home page and log in as an ADMIN user
2. Change your Endpoint to be X3
3. Navigate to Administration > Servers > Hosts
4. Click on the host for this instance of Sage X3
5. Ensure the number of Web Service Child Processes is 1 or more, if it is not, edit and save and amendment then Close Page
6. Navigate to Administration > Web Services > Classic SOAP Pools Configuration
    a. Click Create soapClassicPool
    b. Give an alias of X3EDMSEED
    c. Tick Auto start
    d. Set an initialization size of 1
    e. Set a Maximum Size of 1
    f. Select the Endpoint SEED
    g. Select the Locale as per the installation language required (*eng-us is recommended)
    h. Select the user admin
    i. Click Save
    j. Click Start/Update
    k. If you receive any errors at this point, contact your Sage support representative
7. Repeat step 6 for each Endpoint to be installed replacing the text in red with the Endpoint name.

4. Before running the EDM setup program

Before beginning the installation, it is best practice to run through the following bullet points to ensure the installation runs smoothly:

- All the steps and considerations of the previous chapters have been satisfied
- You have your V1 licenses to hand and they're uncompressed and accessible to the server where you are installing, in our *example* we will use C:\temp\EDMLics
- You know the location of solution.xml
- If installing against PU9 or V11, you know the Syracuse server name, port, username and password
- You know the SQL server name and credentials of the intended SQL / Oracle instance to install EDM* and PIA / SOA*
- You know the mail server address and credentials for the inbound-delivery and outbound submission of emails
- You know the fax modem com port*
- You have shared all transactional and barcode printers required by the integration as the same user as the Sage X3 runtime user so they are visible from File Explorer as that user

If licensed for

5. Running the R12.1 setup program

Assumptions:

▶ Sage X3 Folder / Endpoint to be installed against is SEED
▶ The pre-requisites have all been performed

Installation Procedure

1. Navigate to the portal and download the distribution (username is **v1** the password is **software**)
2. When downloaded, un-compress it to a temporary location, in our *example* will assume c:\temp\R12.1DISTRIBUTION
3. Navigate to c:\temp\R12.1DISTRIBUTION and run setup.exe AS ADMINISTRATOR
4. After the initialization, you're prompted for your language, select it from the drop down, click Next >
5. Select server installation, click Next >
6. Select the version of Sage X3 to be installed against, confirm the location required for the server components (avoid spaces in this path) and the path for any clients you wish to install on the server, click Next >
7. Browse to C:\temp\EDMLics, click Apply then click Next >
8. Browse to the location of solutions.xml, click Install, when completed click Next >

    Example location: C:\Sage\X3PU9TRAIN\Folders

9. Browse to poolgetdef_reply.xml*, all correctly configured pool aliases will be displayed. If you do not wish to install one at this point (more can be added at any-time post installation) highlight the line and press delete.

    *For Sage X3 V6.5 or PU8, enter the credentials as entered for the SAFE X3 Console (i.e. ADMIN and no password)

    *For Sage X3 PU9 or V11, enter the credentials used to login to Syracuse (i.e. ADMIN and add a password of **admin** in the grid)

    These credentials are used to authenticate all web-service connectivity between Sage X3 and EDM / PIA / SOA for each Sage X3 Folder / Endpoint.

    When satisfied, click Install. (Take a note of those you applied, you will need it for the patching). When finished, click Next >

    Example location for V6.5/PU8: C:\Sage\SafeX3\ADXADMIN\tmp\WEB231\poolgetdef)
    Example location for PU9/V11: C:\Sage\SAFEX3\AdxAdmin\tmp\X3PU9ADCSRV\poolgetdef)
    Or
    If you have created your own file, wherever it was saved to in the Web Service Connectivity chapter

10. Select whether this is a SQL or Oracle installation of Sage X3
11. If SQL
    a. Click the List button to find the instance you wish to install the EDM database. This does not have to be the same one as Sage X3, but it is recommended
    b. Confirm your credentials (this does not have to be sa, just a user with dbowner privileges) and database name required, click Test to verify the credentials. When completed, click Install, when completed, click Next >

*You will be asked to confirm optional service credentials, it is recommended these are the same as the Sage X3 runtime user, for instance .\sagex3 as a user and the password for that account.

12. If Oracle
    a. Confirm your credentials and the pre created Oracle database name. When completed, click Install, when completed, click Next >

*You will be asked to confirm optional service credentials, it is recommended these are the same as the Sage X3 runtime user, for instance .\sagex3 as a user and the password for that account.

13. Select the email delivery method the customer uses, confirm the settings as per selection, click Install, when completed, click Next >
14. If licenced for, select the modem location for fax delivery method the customer uses, confirm the settings as per selection, click Install, when completed, click Next >
15. You're prompted for which transactional printers you wish to print to by department and barcode printer by default. Make your selections, click Install, when completed, click Next >
16. If PIA / SOA has been licenced continue, if not, go to step 15
    a. Confirm the location of the directory on the application server from where PDF's copied into it will be polled and imported into the DbCapture system
    b. Confirm the frequency in seconds how often this will happen
    c. Confirm the email address and credentials to access it which will be polled for PDF attachments which when found, will be extracted and imported into the DbCapture system
    d. Confirm the frequency in seconds how often this will happen
    e. Click Install
    f. When prompted, confirm the SQL credentials for the DbCapture database, when satisfied, click Test. When completed, click Create SQL Database. When completed, click Next >

When prompted, say Yes to apply the ABBYY licence.

    g. Click Activate Licence …
    h. Enter the supplied licencing information.
    i. Click Next.
    j. Select activation method (via internet preferred).
    k. Click Next.
    l. Once the process is complete, close the ABBYY licencing module and return to the R12 setup program.
    m. Optional:
        i. Click the Advanced button
        ii. You're given 3 options for enhancement, recommended only for experienced engineers to decide:
            1. When a document is exported, the Invoice / Order is created in Sage X3 and the document is archived (if purchased). A copy is also kept in the DbCapture\Exported directory but is technically now redundant and many customer choose to purge this area after a set period of time. Choose your frequency and click the associated Apply button to do this automatically as a background task.
            2. Now polling the email address specified, you can choose which DbCapture Profile the extracted PDF's will be automatically imported into. Make your selection from the dropdown and click the associated Apply button to set this.
            3. When a document has been fully validated and matched in DbCapture, it will be given a state of OK. In order to accept and therefore create the document / archive the document, a user must click the Accept button in the client or from the list in the DbCapture Administration client. Choose your frequency and click the associated Apply button to do this automatically as a background task.
    n. When the installation has completed, click Next >
17. Click the Check button to interrogate the DbLogin authentication server which will display those clients your licences permit you to wish to install on the server. You are advised to install at least the DbLogin Admin Client, but installing all those available is recommended for testing purposes. Make your selections, click Install, when completed, close the setup program.

6. Pre-Patching Tasks – Sage X3 Interface

Assumptions:

▶ Sage X3 Folder / Endpoint to be installed against is SEED
▶ The Server installation has been completed fully based on your licenses

EDM

No Action required

PIA

No Action required

SOA

Because of a limitation with web-service publication, the screen dimension for the Sales Order activity code needs to be no more than 200:

1. Log in to the SEED Folder / Endpoint as an administrative user
2. Go to Development > Data and Parameters > Development Setup > Activity Codes (GESACV)
3. In the Activity code cell, enter SOH, press tab
4. Ensure the screen dimension is no more than 200. If it is, set it to 200, press tab, Save. (Ignore warnings.)

Repeat the above steps for *each* Sage X3 Folder / Endpoint to be patched for SOA.

7. Pre-Patching Tasks – Sandbox Settings

Assumptions:

▶ Only applicable to Sage X3 PU8 / PU9 / V11
▶ The server components for EDM for Sage X3 by V1 has been installed to c:\v1

A sandbox is a security mechanism for separating core and running programs. So that files can be accessed securely additions need to be made to the Sage X3 sandbox file so EDM for Sage X3 by V1 can function as expected.

In Windows Explorer, navigate to C:\Sage\<SOLUTION>\<PROCESSSERVER>\runtime\cfg And take a backup of ConfigRuntime.JSON.

Open ConfigRuntime.JSON in a text editor, at the "directories": [level, copy and paste the following text is amongst the existing entries:

```
{

    "path": "C:\\v1",

    "writable": true,

    "extensions": ["*"]

},

{

    "path": "c:\\temp",

    "writable": true,

    "extensions": ["*"]

},
```

NOTE: Change the text in red to reflect the actual install path.

Save the file.

8. Applying the patches

Assumptions:

- ▶ Sage X3 Folder / Endpoint to be installed against is SEED
- ▶ The Sage X3 solution to be patched is called X3SOLUTION
- ▶ The Server installation has been completed fully based on your licenses
- ▶ The R12.1 distribution is on the Sage X3 Application server in D:\R12DISTRIB
- ▶ Engineer is familiar with the PATCH function in Sage X3

Q: Where are the patches and how do I know which ones to apply?
A: During the Initial Setup of the setup program, you were asked for the solutions.xml. This is read for several values, one of which is the application.folders.flddirmain location. (For example c:\Sage\X3SOLUTION\Folders\X3).

During the Folder / Endpoint setup of the setup program, the licenses provided are re-analysed and based on what is found, all the necessary patches are copied from the R12DISTRIB to sub-directories beneath the application.folders.flddirmain location, e.g.:

- ▶ c:\Sage\X3SOLUTION\Folders\X3\PATCH\R12-PATCHES-PRODUCTION
    - ▶ The Sage X3 Folder(s) / Endpoint(s) to be patched for EDM / PIA / SOA capability)
- ▶ c:\Sage\X3SOLUTION\Folders\X3\PATCH\R12-PATCHES-X3
    - ▶ The Sage X3 reference Folder / Endpoint

So in our example, all the patches in the R12-PATCHES-PRODUCTION should be applied to SEED and all the patches in the R12-PATCHES-X3 directory applied to the Sage X3 reference Folder / Endpoint.

Again, as an example, if the customer is only licensed for EDM, ONLY the EDM patches will be present in the R12-PATCHES-PRODUCTION and R12-PATCHES-X3 directories respectively.

It removes any risk of patching in error or patching for something the customer is not licensed to use, whatever patches are in the above directories, apply them and you're good to go.

The following pages detail the procedure for each supported version of Sage X3, either using the batch server (recommended option, applying them automatically in the background) *or* manually.

Go to the appropriate page based on the version you are installing against.

8.1 Sage X3 V6.5

Assumptions:

▶ The Server installation has been completed fully based on your licenses
▶ The Sage X3 solution to be patched is called X3SOLUTION

Applying the patches with the batch server for Sage X3 V6.5

1. Login in to the Sage X3 client as an ADMIN user and select the X3 reference folder
2. Go to Usage > Batch Server and click on Server Activation
3. When prompted, say Yes and ensure you get assigned a process number, if so continue with these steps and, click OK. If not or there is an issue, apply the patches manually.
4. Go to Usage > Batch Server and click Request Submission
5. When prompted for Folder, select X3
6. Confirm user and password (these are the credentials you used to login to the Sage X3 client)
7. Enter a Task Code of PATCH, press tab
8. Confirm the date required, press tab
9. Confirm the time required, press tab
10. Click Validation
11. Browse to C:\Sage\X3SOLUTION\Folders\X3\PATCH\R12-PATCHES-PRODUCTION
12. Ensure to TICK patch integration and UNTICK deferred validation
13. Remove the X3 reference folder from the grid and reflect the same Folders that were configured at step 7 of the installation procedure removing any not configured
14. Click OK
15. Go to Usage > Batch Server and click Request Submission
16. When prompted for Folder, select X3
17. Confirm user and password (these are the credentials you used to login to the Sage X3 client)
18. Enter a Task Code of PATCH, press tab
19. Confirm the date required, press tab
20. Confirm the time required, press tab
21. Click Validation
22. Browse to c:\Sage\X3SOLUTION\Folders\X3\PATCH\R12-PATCHES-X3
23. Ensure to TICK patch integration and UNTICK deferred validation
24. Remove all folders from the grid except the X3 reference folder
25. Click OK

Sage X3 V6.5

Assumptions:

- ▶ The Server installation has been completed fully based on your licences
- ▶ The Sage X3 solution to be patched is called X3SOLUTION

Applying the patches manually for Sage X3 V6.5

If you have applied the patches using the batch server in the previous chapter, you do not need to do these steps.

These steps only apply to applying the patches manually if the batch server is unavailable.

1. Login in to the Sage X3 client as an ADMIN user and select the X3 reference folder
2. Press F7 and load the PATCH function
3. Browse to c:\Sage\X3SOLUTION\Folders\X3\PATCH\R12-PATCHES-PRODUCTION
4. Ensure to TICK patch integration and UNTICK deferred validation
5. Remove the X3 reference folder from the grid
6. Reflect the same Folders that were configured at step 7 of the installation procedure removing any not included
7. Click OK
8. Reload the PATCH function
9. Browse to Browse to c:\Sage\X3SOLUTION\Folders\X3\PATCH\R12-PATCHES-X3
10. Ensure to TICK patch integration and UNTICK deferred validation
11. Remove all folders from the grid leaving only the X3 reference folder in the grid
12. Click OK

8.2   Sage X3 PU8 / PU9 / V11

Assumptions:

▶ The Server installation has been completed fully based on your licences
▶ The Sage X3 solution to be patched is called X3SOLUTION

Applying the patches with the batch server for Sage X3 PU8 / PU9 / V11

1. Login in to the Sage X3 front screen as an ADMIN user and select the X3 reference Endpoint
2. Go to Usage > Batch Server and click on Server Activation

   If Server Activation is not visible / available, it may not be possible to use it or is already activated.
   In either case, consult the I.T administrator or move the next chapter to apply them manually.

3. When prompted, say Yes and ensure you get assigned a process number, if so continue with these steps and, click OK. If not or there is an issue, apply the patches manually.
4. Go to Usage > Batch Server and click Request Submission
5. When prompted for Folder, select X3
6. Confirm user and password (these are the credentials you used to login to the Sage X3 front screen)
7. Enter a Task Code of PATCH, press tab
8. Confirm the date required, press tab
9. Confirm the time required, press tab
10. Click Validation
11. Using the magnifying glass in the Patch cell, browse to and click on PATCH\R12-PATCHES-PRODUCTION, click OK
12. **Ensure to TICK patch integration and UNTICK deferred validation**
13. Remove the X3 reference folder from the grid and reflect the same Folders that were configured at step 7 of the installation procedure removing any not configured
14. Click OK
15. Go to Usage > Batch Server and click Request Submission
16. When prompted for Folder, select X3
17. Confirm user and password (these are the credentials you used to login to the Sage X3 client)
18. Enter a Task Code of PATCH, press tab
19. Confirm the date required, press tab
20. Confirm the time required, press tab
21. Click Validation
22. Using the magnifying glass in the Patch cell, browse to and click on PATCH\R12-PATCHES-X3, click OK
23. **Ensure to TICK patch integration and UNTICK deferred validation**
24. Remove all folders from the grid except the X3 reference folder
25. Click OK

Sage X3 PU8 / PU9 / V11

Assumptions:

▶ The Server installation has been completed fully based on your licenses
▶ The Sage X3 solution to be patched is called X3SOLUTION

Applying the patches manually for Sage X3 PU8 / PU9 / V11

If you have applied the patches using the batch server in the previous chapter, you do not need to do these steps.

These steps only apply to applying the patches manually if the batch server is unavailable.

1. Login in to the Sage X3 front screen as an ADMIN user and select the X3 reference Endpoint
2. Click on Development then on > Utilities > Patches > Patch Integration
3. Ensure Server is selected as a destination type and click the magnifying glass in the Patch cell
4. Click on the [PATCH] Patches volume and click on the R12-PATCHES-PRODUCTION icon
5. Click OK
6. Ensure to TICK patch integration and UNTICK deferred validation
7. Remove the X3 reference Endpoint from the grid
8. Reflect the same Endpoints that were configured at step 7 of the installation procedure removing any not included
9. Click OK
10. Click on Development then on > Utilities > Patches > Patch Integration
11. Ensure Server is selected as a destination type and click the magnifying glass in the Patch cell
12. Click on the [PATCH] Patches volume and click on the R12-PATCHES-X3 icon
13. Click OK
14. Ensure to TICK patch integration and UNTICK deferred validation
15. Remove all Endpoints from the grid leaving only the X3 reference
16. Click OK

9. Post Patching task for PU8 / PU9 / V11

To ensure documents can be viewed successfully from within the Sage X3 PU8 / PU9 / V11 interface (namely the EDM Enquiry option from a transaction screen), follow these instructions:

Log in to each of the Endpoint(s) where EDM / PIA / SOA has been applied and repeat the following procedure:

1. Go to Development > Script Dictionary > Screens > Screens (GESAMK)
2. In the screen code cell, type in ARCVISUOBJ, press tab
3. In the SECTIONS / BLOCKS box, click the Actions drop down to the left of Document and click URL Definition
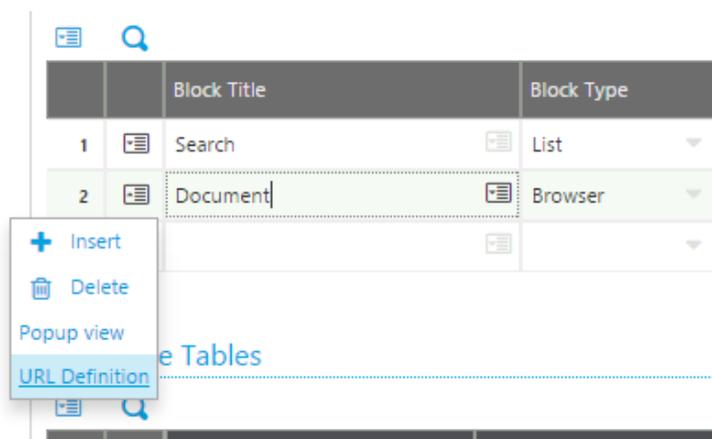
4. In the CODE 1 cell, click the Tunnel icon (Jump To / the middle icon to the right of ARCVISU)
5. Set security level to LOW, click Save
6. Close page
7. Click OK on URL Definition
8. Click Save
9. Click Validation
10. When prompted, click Yes, then Close page
11. Go to Development > Script Dictionary > Windows (GESAWI)
12. In the Window cell, type in ARCVISU, press tab
13. Click Validation
14. When prompted, click Yes, then Close page
15. When convenient, log out of Sage X3 and log back in

10. Post Patching task for PU9 / V11

To ensure outbound reports are correctly processed, they must be transferred to the sandbox. Log in to each of the Endpoint(s) where EDM / PIA has been applied and repeat the following procedure for each of the following report codes:

BONCDE2AUTO
RELFACAUTO
SBONFACAUTO
ARCCLIENT2AUTO
DEVICLIENT2AUTO

1. Go to Development > Script Dictionary > Reports (GESARP)
2. In the Report Code cell, type in the report code, (i.e. SBONFACAUTO), press tab
3. In the Crystal Report block you should see the Crystal Report name XV1_<REPORT_CODE>, click the Actions drop down to the left and select Transfer
4. Click Save
5. Again click the Action drop down and this time select Commit
6. Click Save

NOTE: This procedure will only affect the sample reports as provided by the R12.1 distribution, if you have created / want to use your own reports, you must repeat these steps for those as well.

NOTE: You are advised to log out and back in to Sage X3 before trying to print to reports that have been committed.

11. Post Patching tasks for all versions

EDM

1. For an optimal image viewing experience, users are advised to use Chrome as their browser and to install the following extension (Setting > Extensions > get more extensions > search for 'PDF Viewer' > add to Chrome):

2. Ensure the \DbArchive\cache directory has 'Everyone' permissions write access
3. If licensed for, ensure the DbFax\spool directory has 'Everyone' permissions for write access

PIA

Attempts to auto publish some Object based web-service result in mapping issues, so to avoid this auto publication has been removed and must be done manually once patching a Folder / Endpoint has been completed.

Perform the following steps for *each* Sage X3 Folder / Endpoint that has been patched for PIA to ensure it is available:

1. Log in to the Sage X3 Folder / Endpoint that has been patched for PIA
2. Go to Development > Script Dictionary > Scripts > Web-services (GESAWE)
3. In the Publication column, filter for XV1*
4. For each of the following, click on it then click Save / Publication:
    a. XV1OCRPIH
    b. XV1OCRBIS
5. Click End / Close Page

SOA

Perform the following steps for *each* Sage X3 Folder / Endpoint that has been patched for SOA to ensure matching on Quotes from the left list functions as expected:

1. Once patched for SOA, log out and back in again to the Sage X3 Folder / Endpoint Patched for SOA
2. Go to Parameters / Setup > Sales > Entry Transactions > Orders (GESSLC)
3. In the left list, click SOA
4. Click Validation
    a. You will see 2 info boxes confirming the update of DETSQHNUM and SQDLIN fields, this is normal
5. Close the screen and go to Development > Processes > Processes > Web-services (GESAWE)
6. In the Publication column, filter for XV1ORDER
7. Click in XV1ORDER then click Save / Publication
8. Click End / Close Page

Use the Site Map link at the bottom for Sage X3 V11 to find the equivalent breadcrumb menus above

12. Testing web-service response

Assumptions:

- ▶ All previous steps have been completed fully based on your licenses
- ▶ Sage X3 V6.5 / PU8
  - ▶ The Sage X3 web-server is accessible to the Sage X3 application server
  - ▶ The Sage X3 web-server has a DNS of X3WEB on port 28880
  - ▶ The Sage X3 Folder to be tested is SEED
- ▶ Sage X3 PU9 / V11
  - ▶ The Sage X3 Endpoint to be tested is SEED

The EDM for Sage X3 by V1 solution is entirely driven using web-services.

All lookups and commits of data to allow it to function are reliant on a reliable and tested Sage X3 Apache web-server (if using V6.5 / V7 / PU8) or Syracuse ClassicPool interface (if using PU9 or V11) with uninterrupted connectivity to the Sage X3 database.

It is therefore critically important to test the response prior to implementation and be familiar with how to check the processes involved. Please go to the appropriate section based on your version of Sage X3:

V6.5 / PU8

1. On the Sage X3 Application server browse to http://X3WEB:28880/root

   NOTE: You must use Internet Explorer

2. Enter sage as the username and password
3. Click the Web Service Tester link at the top
4. Populate the Pool entry Group, user and language with the Pool Alias details (in our example X3EDMSEED) as set during the Preparation stage, click save context.
5. Click the sub program link
6. In the public identifier cell, enter XV1GETAD
7. Click the Webservice description button
8. Ensure the response reflects below:

```xml
<?xml version="1.0" encoding="UTF-8"?>
<ADXDOC C_ENG="" FOL="NATRAINV6" HEAD="1" PNA="XV1GETAD" PRG="XV1COMMON" SOL="X3V6SQL" SPG="LOOKUPADDETAILS" TIM="20130920145507" USER="ADMIN" VER="6.30" WRP="WJXV1GETAD" >
    <ADXDATA>
        <GRP DIM="1" NAM="GRP1" PNA="GRP1" >
            <FLD IDX="1" LEN="250" MOD="Input" NAM="CODE" PAR="Value" TYP="Char" ></FLD>
            <FLD IDX="2" MOD="Input" NAM="ITYPE" PAR="Value" TYP="Integer" ></FLD>
        </GRP>
        <GRP DIM="1" NAM="GRP2" PNA="GRP2" >
            <FLD IDX="3" LEN="250" MOD="Input" NAM="INUM" PAR="Adr" TYP="Char" ></FLD>
            <FLD IDX="4" LEN="250" MOD="Input" NAM="IADD" PAR="Adr" TYP="Char" ></FLD>
            <FLD IDX="5" LEN="250" MOD="Input" NAM="IFAX" PAR="Adr" TYP="Char" ></FLD>
            <FLD IDX="6" LEN="250" MOD="Input" NAM="IWEB1" PAR="Adr" TYP="Char" ></FLD>
            <FLD IDX="7" LEN="250" MOD="Input" NAM="IWEB2" PAR="Adr" TYP="Char" ></FLD>
            <FLD IDX="8" LEN="250" MOD="Input" NAM="IWEB3" PAR="Adr" TYP="Char" ></FLD>
            <FLD IDX="9" LEN="250" MOD="Input" NAM="IWEB4" PAR="Adr" TYP="Char" ></FLD>
            <FLD IDX="10" LEN="250" MOD="Input" NAM="IWEB5" PAR="Adr" TYP="Char" ></FLD>
            <FLD IDX="11" LEN="250" MOD="Input" NAM="ITEL" PAR="Adr" TYP="Char" ></FLD>
            <FLD IDX="12" LEN="250" MOD="Input" NAM="INAME" PAR="Adr" TYP="Char" ></FLD>
            <FLD IDX="13" LEN="250" MOD="Input" NAM="ICCODE" PAR="Adr" TYP="Char" ></FLD>
        </GRP>
    </ADXDATA>
    <ADXMEN>

    </ADXMEN>
</ADXDOC>
```

9. Leave this window open, open the Sage X3 Client and login as a user with access to the GESBPS function.
10. Open the function GESBPS to display a list of Suppliers and select one. Take note of the supplier number.
11. Create a simple text file as below, copy the content to your clipboard:

```xml
<?xml version="1.0"?>
<PARAM>
            <FLD NAME="CODE">GBPGB011</FLD>
            <FLD NAME="ITYPE">1</FLD>
</PARAM>
```

NOTE: Change the value in red to your actual supplier number (GESBPS)

12. Paste the contents in the white parameter definition box at the bottom on the screen. When satisfied, click the Execute button at the top.
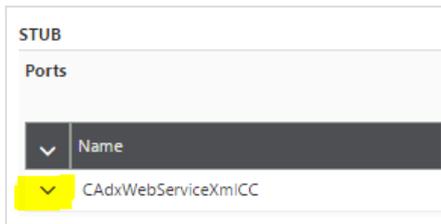13. If successful, you should now see details of the Supplier in the response window.

Obviously this is only testing 1 web-service response, however in general terms, if 1 works they will all work, this procedure proves the patching and connectivity to the Sage X3 database is in place and responsive.

NOTE: If you are *only* licensed for SOA, you must use an alternative web-service to test, contact support for more details.

NOTE: Not all details will be populated, this is normal. Provided *at least* the Supplier Name (<INAME>) is present, all other values are optional.

PU9 / V11

1. Login to Sage X3 as an ADMIN user
2. Change the Endpoint to one that has been patched for EDD / EDM / PIA / SOA
3. Go to Administration > Web Services > Classic SOAP Web Services function
4. Click on the link CAdxWebServiceXmlCC
5. In the STUB section, click the dropdown

6. Click on the **run** link
7. Enter your Language Code (i.e. ENG), Pool Alias (i.e. X3EDMSEED)
8. Enter a public name of XV1GETAD
9. Create a simple text file as below, copy the content to your clipboard:

```
<?xml version="1.0"?>
<PARAM>
          <FLD NAME="CODE">GB052</FLD>
          <FLD NAME="ITYPE">1</FLD>
</PARAM>
```

NOTE: Change the value in red to your actual supplier number (GESBPS)

10. Paste your copied XML into the XML / JSON cell
11. Click the Invoke button
12. If successful, you should now see details of the Supplier in the response window.

Obviously this is only testing 1 web-service response, however in general terms, if 1 works they will all work, this procedure proves the patching and connectivity to the Sage X3 database is in place and responsive.

NOTE: If you are *only* licensed for SOA, you must use an alternative web-service to test, contact support for more details.

NOTE: Not all details will be populated, this is normal. Provided *at least* the Supplier Name (<INAME>) is present, all other values are optional.

13. Import the Sage X3 Users in to EDM

Assumptions:

▶ Sage X3 Folder / Endpoint to be installed against is SEED
▶ The Server installation has been completed fully based on your licenses
▶ The patches have been applied
▶ The R12 distribution is on the Sage X3 Application server in D:\R12DISTRIB

Now that Sage X3 has been patched, all the Sage X3 users in all Sage X3 Folders / Endpoints have been captured and can be imported in to the EDM authorisation module.

The action of doing this means that when opening a client (such as DbDeposit) you are then given the option which Sage X3 Folder / Endpoint you wish to archive against.

Similarly it authorises Sage X3 users to have access to the same data in EDM / PIA / SOA as they do in Sage X3, for example for Site codes.

1. Navigate to D:\R12DISTRIB and run setup.exe AS ADMINISTARTOR
2. Select Server Installation, click Next >
3. When prompted, select Sage X3 Folder Management, click Next >
4. Select Import Sage X3 Folder access permissions, click Next >
5. Click Import
6. Close the setup program
7. Assuming installed, when prompted, launch the DbLogin Admin Console
8. When prompted, login as administrator / administrator

Now all Sage X3 users have been imported into the EDM authentication module, the next steps cover:

• Configuring the default_user

Q: What is the default user?
A: The default user is a DbLogin user from which all subsequently created users inherit settings. So for instance, if you configure your default user to have access to EDM and all PIA profiles, all users then created will automatically be given the same access saving a lot of time individually assigning it if you have a lot of users to add.

• Creating the ADMIN user

Many of the tasks (lookups and commits of data) are done as the ADMIN user in Sage X3, so similarly they are also done in the EDM / PIA / SOA for Sage X3 by V1 system.

14. Configure the default_user

Assumptions:

- ▶ Sage X3 Folder / Endpoint to be installed against is SEED
- ▶ The Server installation has been completed fully based on your licenses
- ▶ The installation language is ENG
- ▶ The patches have been applied
- ▶ The R12.1 distribution is on the Sage X3 Application server in D:\R12DISTRIB
- ▶ The server components for EDM for Sage X3 by V1 has been installed to c:\v1
- ▶ The DbLogin Admin Console is loaded and logged in as administrator

In our example, we will assume the default user (and therefore subsequently created users) want access to everything in a fully licensed scenario.

If licensed for PIA or SOA, have a file explorer open in the c:\v1\DbCapture\Profile directory as this is handy for the steps as follows:

1. Click the tick box to the left of the default_user

2. Click the   icon at the top of the screen

3. Right click on Live then left click on Add Application, click OK. Repeat this adding all available applications until you see the message 'DEFAULT USER is already configured to use all applications in LIVE'

4. If licensed for PIA / SOA:
   a. Click on the DbCapture tree and notice the ProfilesAllowed cell. This needs to contain all the relevant profiles as installed / licenced for. In our example it's SEED, so the ProfilesAllowed cell needs to contain the following:

      SEED_ENG_SalesOrders,SEED_ENG_DirectCodedDbCapture,SEED_ENG_DbCapture, SEED_ENG_APARDbCapture

      If only licensed for SOA, it would only need to contain:

      SEED_ENG_SalesOrders

      .. and so on. Here you are *telling* the system which DbCapture Profiles you want the user to have access too.

      To check and therefore know what to add, navigate to the c:\v1\DbCapture\Profile directory in File explorer.
      All files with a syntax .DBCP can be added to the ProfilesAllowed cell separated by a comma.

   b. Set the CandidatesEnabled to 1 (or true)
   c. Set the AccessLevel to 5
   d. Click Save

Again in our example, the default_user is now configured to use all licensed components.

15. Create the ADMIN user

Assumptions:

- ▶ Sage X3 Folder / Endpoint to be installed against is SEED
- ▶ The Server installation has been completed fully based on your licenses
- ▶ The patches have been applied
- ▶ The R12 distribution is on the Sage X3 Application server in D:\R12DISTRIB
- ▶ The DbLogin Admin Console is loaded and logged in as administrator

1. Click the ![icon] icon at the top of the screen
2. Click Add …
3. Enter the Username ADMIN (**in upper case**) and a User Level of 32768
    NOTE: A user level of 32768 gives a user permission to use the DbLogin Admin Console
4. Enter the email address *matching the Sage X3 Workflow address for the Sage X3 ADMIN* user

    For Sage X3 PU8 / PU9 / V11 this is the ADMIN user in Parameters / Setup > Users > Users

5. Enter a password (this does not need to match but is advisable)
6. Un tick Must Change
7. Click Update
8. Click Close

If you have configured your default_user to have access to everything available, no further action is needed. If not, ensure ADMIN is given access to everything available as per the steps detailed.

16. Final Step

Assumptions:

► All previous steps have been completed
► The R12 distribution is on the Sage X3 Application server in D:\R12DISTRIB
► The Sage X3 Application server has a DNS of SAGEAPPSERVER

Now the server components have been installed, patched and the users configured, users must have access to the distribution so they can install their clients.

You are advised to create a share on the Sage X3 application server accessible to users who are to be using the software day to day.

1. Go to Start > Run > Enter compmgmt.msc and press enter
2. Click on Shared Folders > Shares, right click on Shares, click Create Share …
3. Click Next > and when prompted browse to D:\R12DISTRIB, click Next >
4. Give it a meaningful Description (R12DISTRIB), click Next >
5. Pick the required access level permitted, read only is sufficient, click Finish and Finish again to quit

It's a good idea to now test the share on a client PC, in the above example:

\\SAGEAPPSERVER\R12DISTRIB

Now this is setup, supply the Quick Start Client Installation guide to users so they can self-install their clients, all they will need is the server-name of the Sage X3 Application server and to choose where they'd like to install the clients.