



## 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

## Quick Start Server Update

Updated - 16 March 2017

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# 1. Introduction

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

## Pre-requisites

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

**You cannot skip any of the following.**

**If you continue with an update and any of the following has been bypassed, you will be charged to rectify any issues caused.**

- ▶ A suitable backup of the EDM / PIA databases has been taken
- ▶ A suitable backup of the \V1 directory has been taken *NOTE: Backups of all key scripting files updated is taken as part of the procedure but you are advised to take one anyway*
- ▶ R11.1 is installed
  - ▶ You cannot update to R12 from a previous version using the R12 setup program. You must first use the R11.1 distribution to update your core components, only then can you use the R12.1 setup program to update the system.
- ▶ The engineer has a good working knowledge of Windows and Sage X3 administration, setup and installation.
- ▶ Some knowledge of the V1 software, but this is not essential.
- ▶ Knowledge of Windows Services, command line functionality and the registry
- ▶ A copy of the EDM for Sage X3 by V1 R12.1 distribution is accessible to the Sage X3 Application server on a physical drive
- ▶ For **printing capability** - You have details of the customer's printers they want to use for document and you have installed the Barcode printer on the client(s) machine. Printers must be shared so the Sage X3 application server can 'see' it for the **Sage X3 runtime user account**
- ▶ Ensure .NET 3.5 is installed on the Sage X3 Application Server
- ▶ If you are also updating to PU9 / V11
  - ▶ The ClassicPool web-service capability has been validated by Sage as 100% functioning as expected and using a tool such as SoapUI can be communicated with using a standard web-service.
  - ▶ The Sage X3 Folder / Endpoint has been migrated from the previous version of Sage X3 to PU9 / V11. *NOTE: V1 cannot assist in this procedure, it is a pre-requisite of a successful update to R12.*

Ensure you know the location of the following files in the Sage X3 directory structure:

solution.xml

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. Pre-Update task bug-fix

### Assumptions:

- ▶ The pre-requisites have all been performed
- ▶ R11.1 at the MINIMUM has is installed / has been updated too
- ▶ The pre-update bug-fix task has been performed
- ▶ Engineer has familiarity with the Windows registry

Many settings and values the EDM for Sage X3 by V1 setup programs use to know information about the system are stored in the registry.

Previous releases prior to R12.1 stored these in CURRENT\_USER (in order to align with the SAFE X3 Console) on the assumption that the same administrative user would do the installation / update / maintenance of the system.

This however has proved problematic if this is not possible so if launched as a different user, the installer does not find the registry entries it is expecting and therefore assumes a new install.

From R12.1 onwards, LOCAL\_MACHINE will be used to store these same values.

In readiness for this, the R11.1 setup did attempt to move all found values from all users so that when running the R12 setup program for the first time, an attempt is made to locate and migrate / cleanse any values found for all users on the Sage X3 Application server (where the setup program is ran) and correctly import them to LOCAL\_MACHINE.

This is done using a PowerShell command, however on some versions of Windows (2008 R2 in particular), this command can be prevented from running for security or environmental reasons.

Before starting an update, manually ensure the following branch is present:

If 32 bit:

```
HKEY_LOCAL_MACHINE\SOFTWARE\X3Integration
```

If 64 bit:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\X3Integration
```

And that it contains plausible values regarding the environment.

If it is present, not further action is necessary.

If it is not, search the entire registry for X3Integration and when found (in the users CURRENT\_USER branch who originally installed it) export it as a .reg file. Edit the path to reflect the above and re-import it.

### 3. If updating an EDD installation

#### Assumptions:

- ▶ The pre-requisites have all been performed
- ▶ R11.1 at the MINIMUM is installed / has been updated too
- ▶ The pre-update bug-fix task has been performed
- ▶ The R12.1 distribution is on the Sage X3 Application server in D:\R12DISTRIB
- ▶ The server components for EDD for Sage X3 by V1 is installed in the c:\v1 directory
- ▶ The Sage X3 Folder / Endpoint where EDD has been installed is SEED
- ▶ The printers to be used in conjunction with EDD have be shared and visible to the Sage X3 Application as the **x3 runtime user**

1. Go to the chapter 'Run the R12.1 Setup Program' and run to completion
2. Login to the SEED Sage X3 Folder / Endpoint as ADMIN
3. Open the ADOTRT function
  - a. V6.5 (Development > Processes > Processes > Process Editor)
  - b. PU8/PU9/V11 (Development > Script Dictionary > Scripts > Scripts Editor)
4. Open the XV1SPEARC process
5. Find this line:

```
System RESULT= ARCVAL+"dbpdf\RunPDF.bat" - NOMPCE - GUSER - nomap -  
V1SERVER - V1PORT - V1USER -V1PASSWORD -V1POOLALIAS
```

6. Change it to read (note the additional parameter at the end of the line)

```
System RESULT= ARCVAL+"dbpdf\RunPDF.bat" - NOMPCE - GUSER - nomap -  
V1SERVER - V1PORT - V1USER -V1PASSWORD -V1POOLALIAS -SOURCEDESTINATION
```

7. Save and compile XV1SPEARC
8. Open the GESAIA function (Parameters / Setup > Destinations > Destinations by user)
9. For your users, take a note of any reports suffixed AUTO and the printers they are using
10. Navigate to D:\R12DISTRIB and load the R12.1 setup program and select EDM Printer Management
11. Using your Destinations by users as a guide, reflect the same setup in the EDM Printer Management screen for each user / Sage X3 Folder / Endpoint
12. Close the R12 setup program

The update procedure is now completed, no new patches are needed as the R12.1 setup program takes care of the core software update, the only remaining consideration is if the version of Sage has also been updated to PU9 / V11.

If this is the case, go to the chapter 'Classic Soap Pools Configuration'.

*NOTE: It is acknowledged that steps 8 onwards maybe time consuming, but is a necessary step to preserve the functionality.*

*NOTE: Steps 2 onwards must be repeated for each Sage X3 Folder / Endpoint EDM / PIA has been applied too.*

## 4. If updating an EDM / PIA installation

### Assumptions:

- ▶ The pre-requisites have all been performed
- ▶ R11.1 at the MINIMUM is installed / has been updated too
- ▶ The pre-update bug-fix task has been performed
- ▶ The R12.1 distribution is on the Sage X3 Application server in D:\R12DISTRIB
- ▶ The server components for EDM for Sage X3 by V1 is installed in the c:\v1 directory
- ▶ The Sage X3 Folder / Endpoint where EDM has been installed is SEED
- ▶ The printers to be used in conjunction with EDM have be shared and visible to the Sage X3 Application as the **x3 runtime user**

1. Go to the chapter 'Run the R12.1 Setup Program' and run to completion
2. Open the GESAIA function (Parameters / Setup > Destinations > Destinations by user)
3. For your users, take a note of any reports suffixed AUTO and the printers they are using
4. Navigate to D:\R12DISTRIB and load the R12.1 setup program and select EDM Printer Management
5. Using your Destinations by users as a guide, reflect the same setup in the EDM Printer Management screen for each user / Sage X3 Folder / Endpoint
6. Close the R12.1 setup program

*NOTE: It is acknowledged that steps 8 onwards maybe time consuming, but is a necessary step to preserve the functionality.*

*NOTE: Steps 2 onwards must be repeated for each Sage X3 Folder / Endpoint EDD / EDM / PIA / SOA has been applied too*

## 5. Classic SOAP Pool Configuration

*NOTE: Only follow these steps if you are also updating to PU9 / V11 **as well as** updating to R12.1.*

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.

They must be meaningfully named using the following naming convention:

X3EDM<ENDPOINT>

So if you have a Sage X3 Endpoint called PILOT, it must be named **X3EDMPILOT** which we will use in the following example, change as appropriate to represent the Endpoint(s) to be used in conjunction with EDM / PIA / SOA.

1. Log in to the Syracuse home page 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 X3EDMPILOT
  - c. Tick Auto start
  - d. Set an initialization size of 1
  - e. Set a Maximum Size of 1
  - f. Select the Endpoint PILOT
  - g. Select the Locale as per the installation language required
  - 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.

## 6. Run the R12.1 setup program

### Assumptions:

- ▶ The pre-requisites have all been performed
- ▶ The R12.1 distribution is on the Sage X3 Application server in D:\R12DISTRIB
- ▶ The server components for EDM for Sage X3 by V1 is installed in the c:\v1 directory

### Update Procedure

1. Navigate to D:\R12DISTRIB and run setup.exe **AS ADMINISTRATOR**
2. Select Server Installation, click Next >
3. Select Update your system, click Next >
4. The solution.xml file should be pre-selected, but if not browse to it
5. The path to the EDM for Sage X3 by V1 server components should be pre-selected, but if not browse to it
6. Confirm if the version of Sage X3 has also been updated
  - a. If YES is selected, choose the version updated too
  - b. If NO, continue
7. Click the Update button, when asked to confirm, click Yes

### Actions performed:

- If found, the DbArchive directory is backed up and the new scripts are copied in place and configured
  - If found, the DBPDF directory is backed up and the new scripts are copied in place and configured
  - If found, the DbCapture directory is backed up and the new scripts are copied in place and configured, new services are installed to add the PDF Pickup enhancements
8. When completed, click Next >
  9. 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 Close.

## 7. Post Update Checklist

### Assumptions:

- ▶ The Server Update has been completed fully

### EDM

Ensure all the services beginning Db\* are started  
Ensure all the services beginning EDM are started  
Ensure the pool aliases are started  
Ensure the printers are properly shared

### PIA

Ensure all the services beginning Db\* are started  
Ensure all the services beginning EDM are started

## 8. Applying the patches

### Assumptions:

- ▶ Sage X3 Folder / Endpoint to be installed against is PILOT
- ▶ 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

Refer to this section in the Quick Start Installation Guide.

## **9. Post Patching task for PU8, PU9 and V11**

If applicable, refer to this section in the Quick Start Installation Guide.

## **10. Post Patching task for PU9 and V11**

If applicable, refer to this section in the Quick Start Installation Guide.

# 11. Appendix

## 11.1 If the method of email delivery has been updated from non SSL SMTP

If during an update the customer also wants to update the delivery of their emails to use Gmail or Outlook 365 for instance rather than their local server, this can also be manually done as part for the update.

The standard binaries provided with the EDD functionality do not natively support SSL, however using a free tool (STunnel) in conjunction with it, it can do.

1. On the Sage X3 application server, navigate to <https://www.stunnel.org/downloads.html>
1. Download the latest \*installer.exe
2. Run it and agree to the defaults (when prompted, enter a . for the information requested, this is not important)
3. Once installed, go to the STunnel program group and click STunnel service install
4. In Windows File Explorer, navigate to C:\Program Files (x86)\stunnel\config
5. Take a backup of stunnel.conf
6. Open stunnel.conf in a suitable text editor and reflect the below changing the text in red to match the connectivity the customer uses:

```
debug = info
output = stunnel.log
# GLOBAL OPTIONS
client = yes
output = stunnel-log.txt
debug=7
taskbar=yes
# SERVICE-LEVEL OPTIONS
[SMTP Outgoing]
protocol = smtp
accept = 26
connect = server.outlook.com:587
```

7. Save the file
8. In Windows File Explorer, navigate to the c:\Windows directory and locate / backup / open DbMail.ini in a suitable text editor changing the following values:

```
MailHost=127.0.0.1
MailPort=26
```

9. Save the file.
10. Start the Stunnel SSL wrapper service