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

Release Note

Updated - 16 March 2017

Contents

1. Introduction

This document provides details of EDM for Sage X3 by V1 Release 12.1 including Bug Fixes and enhancements.

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's New for Release 12

The following summarizes the enhancements for Release 12 (applicable to R12.1)

General Enhancements

- ▶ Optimized for V11, out the box support for its ClassicPool Syracuse web-service interface
- ▶ Backwards compatible with V6.5 Patch 30 onwards, PU8 Patch 6 onwards and PU9 Patch 4 onwards
- ▶ Continue to use multiple Sage X3 Folders / Endpoints simultaneously
- ▶ Additional Folders / Endpoints can be added to an existing system in a few clicks
- ▶ Brand new setup program and batch server patching means installation and implementation is easier and quicker than ever

EDM - Electronic Document Management & Distribution

- ▶ All EDM tables have additional Company, Type and Site fields to allow better data filtering
- ▶ 6 additional EDM tables have support for DbDeposit / DbScanner
- ▶ Printing completely overhauled to be made easier to deploy, maintain and manage
- ▶ New Transactional Attachment EDM table allowing for transactions to have their own attachments linking to the source transaction
- ▶ Out the box support for hosted email providers when distributing documents
- ▶ Numerous performance enhancements making lookups faster and more efficient and remains fully web-service driven

PIA - Purchase Invoice Automation

- ▶ New out the box profile allowing for the Coding of Miscellaneous Purchase Invoices hooking in to the Sage X3 approval workflow
- ▶ New out the box profile allowing for the creation of AP Supplier Invoices
- ▶ PDF importing overhauled and configured automatically as soon as a Sage X3 Folder / Endpoint is patched
- ▶ Invoicing elements now recognized and passed as part of the Invoice
- ▶ Poll a pre-designated email box for incoming PDF Invoice attachments from suppliers which are extracted and automatically processed
- ▶ Numerous performance enhancements making lookups faster and more efficient and remains fully web-service driven
- ▶ New features to automatically export documents in an OK state saving time and purge exported documents saving disk space

SOA - Sales Order Automation

- ▶ Introducing the all new out the box profile allowing for the creation of Sales Orders
  - ▶ Based on a previous order from the customer
  - ▶ Matching on a quote or multiple quotes
  - ▶ Manually build your grid items quicker than in the Sage X3 interface

3. FAQ's

The release of R12.1 may raise some questions which are answered below.

R12.1 is *specifically* for *new installs* of EDM against Sage X3 V11 only but is also backwards compatible with V6.5, PU8 and PU9.

If you're already using R12, you do not need to update to R12.1, *functionally* R12 and R12.1 are identical.

The same licenses for R12 can be used for R12.1, however if you have received R11.1 licenses for PIA and yet to install it, contact your account manager as additional licenses are required.

Example scenarios:

- *My customer is on V6.5*
- Download R12.1 as normal

- *My customer is on PU8*
- Download R12.1 as normal

- *My customer is on PU9*
- Download R12.1 as normal

- *My customer is on V11*
- Download R12.1 as normal

- *My customer is on PU9 with R12 and have updated to V11*
- No action needed. As the system is already functional, there is no need to go to R12.1 as they are the same.

- *My customer is on PU8 with R11.1 and have updated to V11*
- Download R12 as normal, follow the Server Update process.

- *My customer is on V6.5 with R10 and have updated to V11*
- We would recommend a V1 professional services engagement to manage the migration.

    Download R11.1, un-compress it, run the setup program to update the system to R11.1.
    Download R12 as normal, run the setup as normal and update the system to R12.1, follow the Server Update process.

Other Scenarios

Q: What if I already have R11.1 installed?
A: If you already have R11.1 installed, using the R12.1 setup program your system can be updated with just a few clicks.

Q: What if I've already downloaded R11.1 but haven't yet installed it?
A: You are advised to download and install R12.1. The same licenses you already have can be used with R12.1, although there are extra licenses required for PIA and SOA capabilities. Contact your V1 account manager for more information.

Q: What if I'm on an older release such as R9 or R10.1?
A: Because of the considerable architectural and technological enhancements in R12.1, it is not possible to update to R12.1 from any version before R11.1. You are advised to download the R11.1 distribution, update your system to R11.1, then run the R12.1 installer to update.

Compatibility

Q: Can I install R12 on V7 or update my system?
A: To continue our commitment to develop against the latest software and technology Sage provide, the decision was made to drop *out the box* support for V7. As a professional services engagement, R12 *can* be made to work with V7.
Contact your V1 account manager for more information.

4. Core Server Component Versions

Component	Version
DbLogin Server	2.2 Build 002.004
DbArchive Server SQL	2.2 Build 001.011
DbArchive Server Oracle	2.2 Build 001.011
DbMail	2.2 Build 001.004
DbFax	3.95 Build 001.003
DbCapture	2.2.5.2
DbForm	2.5 Build 001.005

Component	Version
Setup Program	12.1.0.0
Log Viewer	1.4.1.1

5. Core Client Components Versions

Component	Description
DbLogin Admin Client	2.2.5.22
DbScanner	2.2.4.35
DbMail Admin Client	2.2.5.7
DbFax Client	2.2.5.7
DbCapture Admin	2.2.5.7
DbCapture Client	2.2.5.7
DbDeposit Client	2.2.5.19
BLOB Type Manager	2.2.5.5

6. Patch Summary – V6.5

EDM

Patch	Description
_X3EDM_0120001_12_160.dat	Primary patch setting up web-service connections
_X3EDM_0120002_12_160.dat	Reads the servers.txt per folder / Endpoint
_X3EDM_0120010_12_160.dat	Activation of the Transactional Attachments
_X3EDM_0120004_12_160.dat	ARCHIVE
_X3EDM_0120005_13_160.dat	US Hotfix for Archiving date display
_X3EDM_012006_12_160.dat	GETUSERS process and authorization rule
_X3EDM_012007_12_160.dat	EXE for GETUSERS process
_X3EDM_R1200001_12_160.dat	Example crystal reports

PIA

Patch	Description
_XV1OC_0120001_19_160.dat	Setup patch for OCR transaction
_XV1OC_012002_19_160.dat	OCR Connector
_XV1OC_0120003_19_160.dat	XV1SPEWS Switching process

DIRECT

Patch	Description
_XV1DIRECT_0120001_19_160.dat	Primary patch setting up web-service connections
_XV1DIRECT_0120001_19_160.dat	Validation patch for web-service connections

AP

Patch	Description
_XV1DIRECT_0120001_19_160.dat	Primary patch setting up web-service connections

SOA

Patch	Description
_XV1SOH_0120001_19_160.dat	Primary patch setting up web-service connections
_XV1SOH_0120002_19_160.dat	Validation patch for web-service connections
_XV1SOH_0120003_19_160.dat	XV1SPEWS Switching process

7. Patch Summary – PU8

EDM

Patch	Description
X3EDM_0120001_12_180.dat	Primary patch setting up web-service connections
X3EDM_0120002_12_180.dat	Reads the servers.txt per folder / Endpoint
X3EDM_0120008_12_180.dat	PU8 specific tasks for FILCOP / CHK
X3EDM_0120010_12_180.dat	Activation of the Transactional Attachments
X3EDM_0120006_12_180.dat	GETUSERS process and authorization rule
X3EDM_0120007_12_180.dat	EXE for GETUSERS process
X3EDM_0120009_12_180.dat	ARCHIVE for PU8
X3EDM_R1200001_12_180.dat	Example crystal reports

PIA

Patch	Description
XV1OC_0120001_19_160.dat	Setup patch for OCR transaction
XV1OC_012002_19_160.dat	OCR Connector
XV1OC_0120003_19_160.dat	XV1SPEWS Switching process

DIRECT

Patch	Description
XV1DIRECT_0120001_19_160.dat	Primary patch setting up web-service connections
XV1DIRECT_0120001_19_160.dat	Validation patch for web-service connections

AP

Patch	Description
XV1DIRECT_0120001_19_160.dat	Primary patch setting up web-service connections

SOA

Patch	Description
XV1SOH_0120001_19_160.dat	Primary patch setting up web-service connections
XV1SOH_0120002_19_160.dat	Validation patch for web-service connections
XV1SOH_0120003_19_160.dat	XV1SPEWS Switching process

8. Patch Summary – PU9

EDM

Patch	Description
_X3EDM_0120001_12_190.dat	Primary patch setting up web-service connections
_X3EDM_0120002_12_190.dat	Reads the servers.txt per folder / Endpoint
_X3EDM_0120008_12_190.dat	PU9 specific tasks for FILCOP / CHK
_X3EDM_0120010_12_190.dat	Activation of the Transactional Attachments
_X3EDM_0120006_12_190.dat	GETUSERS process and authorization rule
_X3EDM_0120007_12_190.dat	EXE for GETUSERS process
_X3EDM_0120009_12_190.dat	ARCHIVE for PU8
_X3EDM_R1200001_12_190.dat	Example crystal reports

PIA

Patch	Description
_XV1OC_0120001_19_190.dat	Setup patch for OCR transaction
_XV1OC_012002_19_190.dat	OCR Connector
_XV1OC_0120003_19_190.dat	XV1SPEWS Switching process

DIRECT

Patch	Description
_XV1DIRECT_0120001_19_160.dat	Primary patch setting up web-service connections
_XV1DIRECT_0120001_19_160.dat	Validation patch for web-service connections

AP

Patch	Description
_XV1DIRECT_0120001_19_160.dat	Primary patch setting up web-service connections

SOA

Patch	Description
_XV1SOH_0120001_19_160.dat	Primary patch setting up web-service connections
_XV1SOH_0120002_19_160.dat	Validation patch for web-service connections
_XV1SOH_0120003_19_160.dat	XV1SPEWS Switching process

9. Patch Summary – V11

EDM

Patch	Description
_X3EDM_0120001_12_110.dat	Primary patch setting up web-service connections
_X3EDM_0120002_12_110.dat	Reads the servers.txt per folder / Endpoint
_X3EDM_0120008_12_110.dat	PU9 specific tasks for FILCOP / CHK
_X3EDM_0120010_12_110.dat	Activation of the Transactional Attachments
_X3EDM_0120006_12_110.dat	GETUSERS process and authorization rule
_X3EDM_0120007_12_110.dat	EXE for GETUSERS process
_X3EDM_0120009_12_110.dat	ARCHIVE for PU8
_X3EDM_R1200001_12_110.dat	Example crystal reports

PIA

Patch	Description
_XV1OC_0120001_19_110.dat	Setup patch for OCR transaction
_XV1OC_012002_19_110.dat	OCR Connector
_XV1OC_0120003_19_110.dat	XV1SPEWS Switching process

DIRECT

Patch	Description
_XV1DIRECT_0120001_19_160.dat	Primary patch setting up web-service connections
_XV1DIRECT_0120001_19_160.dat	Validation patch for web-service connections

AP

Patch	Description
_XV1DIRECT_0120001_19_160.dat	Primary patch setting up web-service connections

SOA

Patch	Description
_XV1SOH_0120001_19_160.dat	Primary patch setting up web-service connections
_XV1SOH_0120002_19_160.dat	Validation patch for web-service connections
_XV1SOH_0120003_19_160.dat	XV1SPEWS Switching process

10. Miscellaneous Component Details

- ▶ Activity code: X3EDM
- ▶ Local Menu: 4691

11. R12 Enhancements

Issue key	Summary
VSI-2627	Training Video Candidates
VSI-2616	Add secondary and tertiary DbCapComms services to the standard
VSI-2541	R12 def files / installer needs translating
VSI-2540	Cope with multiple Quotes for SOA
VSI-2501	General Performance improvements
VSI-2381	Enhance installer / Log Viewer to accommodate R12
VSI-2380	Add support for 'hosted' email server
VSI-2376	Compatible with release PU9
VSI-2365	Add statements as standard
VSI-2364	Add DbArchive tables we've done as bespokes
VSI-2363	Cleanse DbArchive tables
VSI-2352	Add DIRECT coding facility to DbCapture for Invoices
VSI-2351	Add AP/AR Invoice Support to DbCapture
VSI-2292	Add the DbMail PDF extractor to the standard solution
VSI-2290	Add Sales Order Suport to DbCapture
VSI-2289	Add transactional Attachments table
VSI-2284	Printing overhaul for Outbound documents
VSI-2283	Company / site access filtering
VSI-2279	Respect archiving linked object
VSI-2244	Site code validation
VSI-2186	DbWebQ u/p visible in URL
VSI-1664	Unable to send email from Sage X3 via Outlook 365
VSI-904	DbCapture support for carriage lines on an invoice

12. R12.1 Enhancements

Issue key	Summary
VSI-3196	Compatible with Sage X3 V11

13. Bug Fixes

Issue key	Summary
VSI-2157	PIA trying to create a PI with more 18 lines fails
VSI-2169	Remove/hide yes no column in PIA
VSI-2170	V7 outbound doesn't print if not defined
VSI-2371	Review of CASE behaviour of DBPDF for EMAILONLY / FAXONLY etc
VSI-2377	When printing an outbound report, if the printer is passed, a lookup is still performed
VSI-2451	Add extra Accounting Date field to standard DbCapture Profiles
VSI-2477	View <Document> Button does not include Folder