



V1
Document
Management

sage
X3

R13.2

The ability to integrate with Cloud!

Release 13.2 of EDM, EDD and PIA for Sage X3 reflects the continued evolution of the solution in line with Sage’s own strategy to offer customer choice around Cloud and on Premise. New functionality allows for full Cloud to Cloud integration, secure client to Cloud communication and AWS and Azure deployment whilst retaining options for on Premise deployment. The table below highlights some typical scenarios:

Sage X3	V1 EDM / PIA	R12 and earlier	R13 / R13.1	R13.2
On Premise	On Premise	Yes	Yes	Yes
Private Cloud	Private Cloud	Yes	Yes	Yes
On Premise	Private Cloud	No	Yes	Yes
Private Cloud	On Premise	No	Yes	Yes
On Premise	AWS / Azure	No	EDM only	Yes
Private Cloud	AWS / Azure	No	EDM only	Yes
Sage 'single tenant' Cloud	AWS / Azure	No	No	Yes
Sage 'single tenant' Cloud	Private Cloud	No	No	Yes
Sage 'single tenant' Cloud	On Premise	No	No	Yes

13.2 represents a major step forward to customers still using R12 or earlier, including the V1 SmartSuite using HTML5 technology for a modern device independent user experience harmonised with Sage X3. The following modules are available:

- Smart Deposit - Replaces the Windows client DbDeposit as a browser based interface for adding ad-hoc documents to the V1 Archive from PC or mobile device
- SmartRetrieve - Replaces and improves on DbWebQuery as a mechanism for retrieving and viewing documents from the EDM Archive. It supports Quick Searches across multiple document types and Saved Searches. An optional Full Text Search facility is also available.
- SmartRetentions – Which allows document retention policies to be put in place to allow secure ad hoc deletions or managed expiration of documents to comply with legislative requirements such as GDPR



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- SmartMail – replaces DbMailExtractor and DBMailSend for the sending of emails and secure capture of inbound documents from emails in line with current security protocols, and allows PIA solutions to accept invoices directly from email for optimum efficiency

How 4.6 has improved Sage X3 integration

We are consistently improving our customers' experience, and ensure that our solutions meet your needs, V1 have updated Sage X3 We are particularly focused on ensuring our solutions are in line with modern technologies, especially the cloud.

Key 13.2 solution enhancements

- **Better suited to Cloud deployment**
 - In many cases, scanning can now be implemented with EDM on a hosted server without a VPN.
 - EDM can now be completely separated from Sage X3 and installed on a separate server in a separate data centre or on premise
 - V1 can now support Sage's 'single-tenant' Cloud offering
 - PIA can be implemented on AWS or Azure infrastructure
 - Easier to implement HTTPS rather than HTTP

- **The V1 Smart Portal can now be translated**
 - More than 180 languages supported Partners and end-users can create or improve their own translations¹
 - Individual users can choose their own languages

In 13.2 there have been significant improvements to the Purchase Invoice Automation (PIA) solution. 13.2 is based on release 4.6 of the V1 Document Management which features:

- Improved security, easier Cloud deployment, improved network performance
- A new Licence Manager with improved reporting on usage, on-line updates and alerts before limits are reached
- New SmartMail with support for SMTP as well as IMAP and POP3 and improved integration with Gmail API and Office365 for sending as well as receiving emails

1 - Note – field names, table names and script messages still require in situ translation in this release, but this will be further improved in subsequent releases

Upgrades of existing V1 implementations to R13.2

Current V1 Release	V1 Core Version	X3 pre PU9	X3 PU9 or Newer
R9	2.2b	Sage Upgrade Required	New separate V1 Server
R10	2.2b	Sage Upgrade Required	New separate V1 Server
R11	2.2b	Sage Upgrade Required	New separate V1 Server
R12	2.2b	Sage Upgrade Required	New separate V1 Server
R13.0	4.5		In situ upgrade
R13.1	4.5		In situ upgrade
R13.2	4.6		Current release

The high level steps are outlined below. Upgrades of sites which have had extensive additions or changes, Oracle sites or other variants should each be considered on their merits.

Upgrade Steps - New separate V1 Server

1. Provision new server for V1
2. Install V1 13.2 on new server
3. Patch Sage End Point
4. Evaluate whether any non-standard document fields / document types are in place
 - a. Either migrate data from old server to new server using migration script or SQL migration or
 - b. Bespoke migration process
5. Apply document drill downs
6. Set parameters in Sage to determine V1 server

Upgrade Steps - In Situ

1. Evaluate any customisations which may have been made. Compare scripts for PIA using text compare tool to highlight any customisations (4GL, sub-program, web service, V1 scripts and any field changes)
2. Run patch program for server
3. Update clients
4. Relicense Abby using new license model if PIA