

Technical New Feature Highlights 2023 R2

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Sage



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New Features Highlights 2023 R2

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Security Improvements

- Elasticsearch * with secured DB and connection
- SQL Server Secure connection (console)
- Other Changes

Interface Improvements

Left List Improvements

Improved readability with a separate header section where we can apply filters

A light green alternate hovering colour has been introduced


Grey selected colour has been introduced to distinguish between the selected and hovering colours.


| Order no | Sold-to | Order Date | Reference | Sales Rep | Shipment Status | Postal Code |
|------------------|---------|------------|----------------------|-----------|------------------|-------------|
| TONPT02119/00001 | PT005 | 05/09/24 | | | Delivered | 2910427 |
| SOWFR0110007 | FR004 | 08/07/24 | Test report ACCINV | FR252 | Not delivered | 95370 |
| SOWFR0110006 | FR004 | 08/07/24 | Test report ACCINV | FR252 | Not delivered | 95370 |
| SOWFR0110005 | FR004 | 05/10/23 | Test report ACCINV2. | FR252 | Not delivered | 95370 |
| SOWFR0110004 | FR004 | 31/08/24 | Test report ACCINV1 | FR252 | Not delivered | 95370 |
| SOWFR0110003 | FR004 | 31/08/24 | Test report ACCINV | FR252 | Not delivered | 95370 |
| SOWFR0110002 | FR004 | 08/10/24 | | FR252 | Not delivered | 95370 |
| SOWDE0120012 | DE001 | 21/07/24 | WEB015182112 | DE251 | Not delivered | 28201 |
| SOWDE0120011 | DE001 | 21/12/24 | WEB015182112 | DE251 | Partly delivered | 28201 |
| SOWDE0120010 | DE001 | 09/11/24 | WEB015180911 | DE251 | Partly delivered | 28201 |
| SOWDE0120009 | DE001 | 22/10/24 | WEB015182210 | DE251 | Partly delivered | 28201 |
| SOWDE0120008 | DE002 | 20/09/24 | WEB015182009 | DE251 | Partly delivered | 22047 |
| SOWDE0120007 | DE001 | 06/08/24 | WEB014180608 | DE251 | Partly delivered | 28201 |
| SOWDE0120006 | DE002 | 12/07/24 | WEB014181207 | DE251 | Partly delivered | 22047 |
| SOWDE0120005 | DE001 | 25/06/24 | WEB014182506 | DE251 | Partly delivered | 28201 |
| SOWDE0120004 | DE002 | 15/05/24 | WEB013181505 | DE251 | Partly delivered | 22047 |
| SOWDE0120003 | DE002 | 09/04/24 | WEB013180904 | DE251 | Partly delivered | 22047 |
| SOWDE0120002 | DE002 | 12/03/24 | WEB013181203 | DE251 | Partly delivered | 22047 |
| SOWDE0120001 | DE001 | 08/02/24 | WEB013180802 | DE251 | Partly delivered | 28201 |
| SONZA0210006 | ZA002 | 11/04/24 | | ZA101 | Not delivered | 1460 |


Alternate colouring has been reintroduced to the lines to make it easier to focus.


Collapsed Left Lists

Separator lines have been added to the sections.

Sage | X3 

Orders 

Last read 

| Order no | Sold-to | Order Date | Reference | Sales Rep | Shipment Status | Postal Code |
|----------------------|----------------------|--|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/>  | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| SONZA0210006 | ZA002 | 11/04/24 | | ZA101 | Not delivered | 1460 |
| SOWFR0110006 | FR004 | 08/07/24 | Test report ACCINV | FR252 | Not delivered | 95370 |
| SOWDE0120009 | DE001 | 22/10/24 | WEB015182210 | DE251 | Partly delivered | 28201 |
| SOWDE0120012 | DE001 | 21/07/24 | WEB015182112 | DE251 | Not delivered | 28201 |
| SOIGB0130001 | GB009 | 20/12/24 | | GB101 | Not delivered | CF14 5LZ |
| SOIFR0130001 | FR009 | 10/01/24 | | | Not delivered | 59650 |
| SONPT0320023 | PT002 | 03/09/24 | | PT252 | Delivered | 2715311 |
| SONGB0120031 | GB009 | 30/03/24 | | GB101 | Not delivered | CF14 5LZ |
| SONGB0120030 | GB011 | 04/05/24 | BIKES69123 | | Delivered | RG41 5RD |
| SONGB0120029 | GB010 | 08/08/24 | HHDN8858EE | GB102 | Delivered | BN1 1HH |

Chevrons have been added to make it easier to see which section is opened and collapsed.

Grid Improvements

Alternating colour lines have been introduced to the grids to make it easier for users to focus when working with a large number of lines. Now when you hover over lines you can easily see they are enterable / also when you select to edit

The screenshot displays the Sage CRM interface for a 'Product' record. The 'Financials' tab is active, showing various fields and two data grids. The top grid, under 'Analysis', lists dimensions with alternating row colors. The bottom grid, under 'Lines', lists product lines with alternating row colors. Annotations with arrows point to the alternating colors in both grids, explaining that enterable lines are highlighted to distinguish them from read-only fields.

Financials

Accounting

Accounting code: ASSETIT
Tax level 1: NOR
Tax level 2:
Tax level 3:
SST code: →

Analysis

| | Dim code | Description | Dimension | Description |
|---|----------|-------------|-----------|---------------|
| 1 | CCT | Cost Centre | IT-001 | IT Department |
| 2 | SC1 | Sector 1 | SCT002 | Area 2 |
| 3 | SC2 | Sector 2 | | |
| 4 | PRO | PROD | | |
| 5 | PRJ | Project | | |
| 6 | | | | |

5 Results Display: 20

Lines

| | Product | Chg 1 | Net Price | Margin | Invoicing term | Pr... | Line Amt-Tax | Line Amt+Ta |
|---|---------|-------|-----------|--------|----------------|-------|--------------|-------------|
| 1 | FIN303 | 0.00 | 15.6600 | 1.6300 | | | 375.84 | |
| 2 | FIN313 | 0.00 | 6.6300 | 0.4000 | | | 79.56 | |
| 3 | FIN305 | 0.00 | 11.3900 | 0.8300 | | | 113.90 | |
| 4 | | | | | | | | |

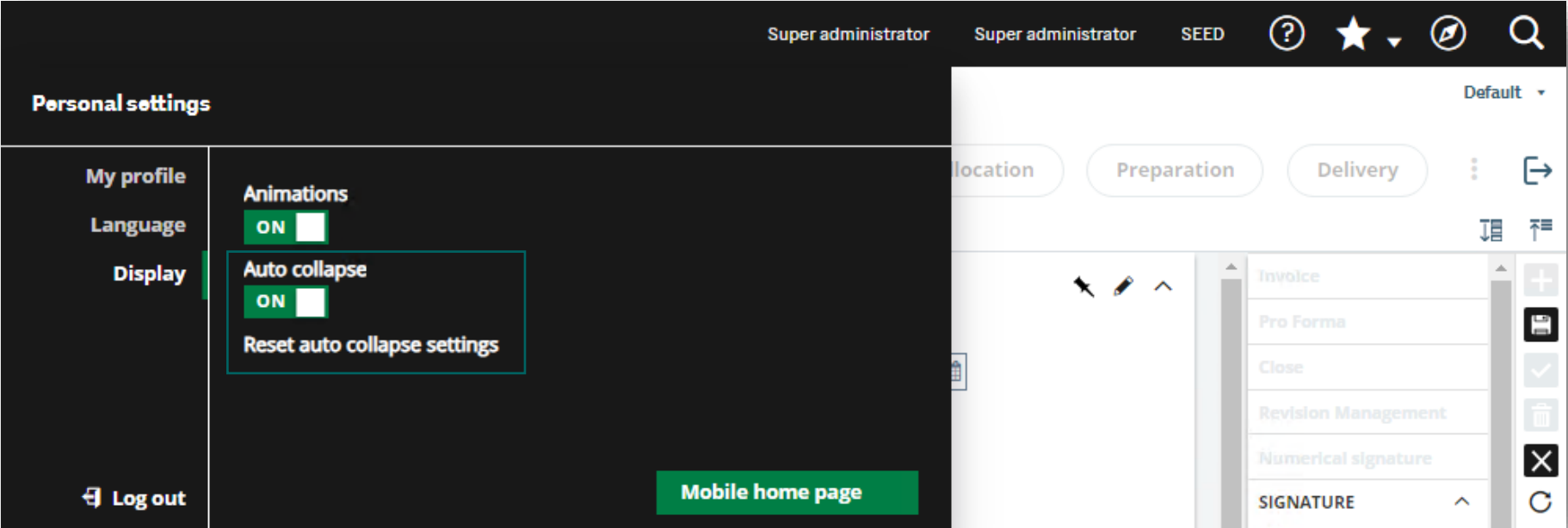
Auto Collapse Feature

A new feature has been introduced called auto collapse to help improve the loading times on complex screens. Testing showed considerable improvements in the loading times when working with complex screens. The feature also allows the user to set the screen appropriately only to expand the tabs needed

The screenshot displays the Sage X3 interface for a 'Sales Order STD: Standard entry'. The top navigation bar includes the Sage logo, 'X3', and user roles like 'Super administrator'. The main content area is organized into sections: 'Delivery', 'Invoicing', and 'Lines'. A right-hand sidebar contains a list of tabs, including 'Invoice', 'Pro Forma', 'Close', 'Revision Management', 'Numerical signature', 'Signature', 'Signature history', 'Signature circuit', 'TEXT', 'Header Text', 'Footer Text', 'ADDRESS', 'Order Address', 'Billing Address', 'Ship-to Address', 'EDI', 'History', 'Issuing', and 'OPTION'. The 'Expanded Tabs' callout points to the 'Signature', 'Signature history', and 'Signature circuit' tabs. The 'Collapsed tabs' callout points to the 'EDI', 'History', and 'Issuing' tabs. A separate callout points to the 'Buttons to expand all or minimise all tabs on this screen' located in the top right corner of the sidebar.

Enable Auto Collapse

The setting is per user and can be turned on and off from the user's profile using the Auto collapse toggle on and off switch. The settings for each screen are saved per user, and the 'reset auto collapse settings' can be used to return to the default of the home & and first tab expanded, and all others minimized.



Batch Server Improvements

Batch Server Interface

Information panel

- Status
- AutoStart settings
- Start/stop time
- Host
- Process Name / ID

Activity Log

- Information including Errors since the start of the batch server

Queries log

- Status of task
- Start/end time of tasks
- Runtime
- X3 PID & Session

The screenshot displays the Sage X3 Batch Server Interface. The top navigation bar includes the Sage logo, 'X3', and user roles like 'Super administrator'. The breadcrumb trail is 'All > Administration > Administration > Endpoints'. The main content area is titled 'X3 batch controller x3v12' and has tabs for 'Information', 'Activity log', 'X3 execution setting', 'Activity setting', and 'Runtimes'. The 'Information' tab is active, showing details for the batch controller X3V12, including its status (Running), auto-start settings, and various session and process identifiers. Below this is the 'Activity log' section, which displays a table of batch controller logs with columns for Date, Severity, and Message. The bottom section is the 'Queries log', which shows a table of query execution results with columns for Number, Task code, Folder, Status, Started at, End at, Message, Runtime, X3 Pid, Task tag, and X3 session. A sidebar on the right contains a menu with options like 'Edit', 'Start', 'Stop', 'Refresh', and 'Controller logs'.

Batch Server Interface

For example, we can see that the DOSSVG Task is on error in the queries log we can easily identify that the reason is that the batch server stopped due to an error with node process 6740 highlighted in the activity log section. Previously in this type of situation we would have had to review the logs to identify the cause.

The screenshot displays the 'X3 batch controller' interface for 'X3V12'. It features a navigation menu with 'Information', 'Activity log', 'X3 execution setting', 'Activity setting', and 'Runtimes'. The 'Activity log' section shows a list of events with columns for Date, Severity, and Message. A red error message is highlighted: 'The administration X3 session with PID 6740 has been disconnected from x3erpv12sqlvm:20100.' Below this, the 'Queries logs' section shows a table of task execution details.

Activity log

Batch controller logs

7 Results Display: 50

| Date | Severity | Message |
|--------------------------|--------------|---|
| 2023-11-09T15:48:17.682Z | Warning | The batch server X3V12 has been stopped |
| 2023-11-09T15:48:17.681Z | Error | The administration X3 session with PID 6740 has been disconnected from x3erpv12sqlvm:20100. |
| 2023-11-09T15:48:12.086Z | info | The stop all of batch server X3V12 has been requested by admin |
| 2023-11-09T15:48:09.436Z | info | The stop all of batch server X3V12 has been requested by admin |
| 2023-11-09T15:41:23.738Z | info | The administration X3 session with PID 6740 has been created on x3erpv12sqlvm:20100. |
| 2023-11-09T15:40:46.423Z | success | The batch server X3V12 is running |
| 2023-11-09T15:40:46.223Z | info | The batch server X3V12 has been started |

Queries logs

17 Results Display: 50

| Number | Task code | Folder | Status | Started at | End at | Message | Runtime | X3 Pid | Task tag | X3 session |
|--------|-----------|--------|----------------------|--------------------------|--------------------------|---------|---------------------|--------|----------|--------------|
| 2819 | DOSSVG | SEED | Batch server stopped | 2023-11-09T15:47:46.240Z | 2023-11-09T15:48:17.463Z | | x3erpv12sqlvm:20101 | 8488 | BATCH | 7233abd6f67b |
| 2813 | AWRSIG | SEED | Success | 2023-11-09T15:47:16.215Z | 2023-11-09T15:47:23.394Z | | x3erpv12sqlvm:20101 | 7988 | | e9b696f36f26 |
| 2814 | AWRSIGV | SEED | Success | 2023-11-09T15:47:16.215Z | 2023-11-09T15:47:23.054Z | | x3erpv12sqlvm:20101 | 6284 | BATCH | b020530d0a2f |
| 2815 | ACCBATCH1 | SEED | Success | 2023-11-09T15:47:16.215Z | 2023-11-09T15:47:21.241Z | | x3erpv12sqlvm:20101 | 5696 | | 9fc1c7ce1204 |
| 2812 | ACCBATCH1 | SEED | Success | 2023-11-09T15:46:16.172Z | 2023-11-09T15:46:19.578Z | | x3erpv12sqlvm:20100 | 5488 | | 27088d5598d2 |

Queries Logs

The queries log screen allows you to see all the tasks executed since the start of the batch again with the overview of the status and other useful information like the start & end stop timings of the task, the folder and the runtime it was executed on.

| | | | |
|---|-------------------------|----------------------|-----------|
| ⋮ | X3V12 | 2772 | AWRKSIG |
| ⋮ | X3V12 | 2774 | ACCBATCH1 |
| ⋮ | X3V12 | 2771 | ACCBATCH1 |
| 📄 | Details | 2769 | AWRKSIG |
| 🔄 | Refresh | 2770 | ACCBATCH1 |
| ? | Help | 2768 | AWRKSIGV |
| ⋮ | X3V12 | 2767 | ACCBATCH1 |
| ⋮ | X3V12 | 2766 | ACCBATCH1 |

Sage | X3 | Super administrator | Super administrator | SEED

Batch queries activity logs

24 Results Display: 20

| Batch server | Number | Task code | Folder | Status | Started at | End at | Message | Runtime | Task tag | X3 session | Web session | X3 |
|--------------|--------|-----------|--------|---------|--------------------------|--------------------------|---------------------|---------|----------|--------------|--------------|----|
| X3V12 | 2722 | ACCBATCH1 | SEED | Success | 2023-11-09T15:01:25.328Z | 2023-11-09T15:01:28.437Z | x3erpv12sqlvm:20100 | | | 927b87fa8449 | 8c98057d076f | 80 |
| X3V12 | 2724 | AWRKSIG | SEED | Success | 2023-11-09T15:00:25.360Z | 2023-11-09T15:00:32.735Z | x3erpv12sqlvm:20101 | | | 1a10e7e8f219 | 8c98057d076f | 83 |
| X3V12 | 2725 | AWRKSIGV | SEED | Success | 2023-11-09T15:00:25.360Z | 2023-11-09T15:00:32.418Z | x3erpv12sqlvm:20101 | BATCH | | 3041c4cb94da | 8c98057d076f | 33 |
| X3V12 | 2726 | ACCBATCH1 | SEED | Success | 2023-11-09T15:00:25.360Z | 2023-11-09T15:00:30.435Z | x3erpv12sqlvm:20101 | | | 0f47e262ee04 | 8c98057d076f | 72 |
| X3V12 | 2723 | ACCBATCH1 | SEED | Success | 2023-11-09T14:59:25.330Z | 2023-11-09T14:59:28.346Z | x3erpv12sqlvm:20100 | | | 84508fe96a94 | 8c98057d076f | 67 |
| X3V12 | 2720 | AWRKSIG | SEED | Success | 2023-11-09T14:58:25.336Z | 2023-11-09T14:58:32.677Z | x3erpv12sqlvm:20101 | | | 579a43d7e78a | 8c98057d076f | 96 |
| X3V12 | 2722 | ACCBATCH1 | SEED | Success | 2023-11-09T14:58:25.336Z | 2023-11-09T14:58:30.395Z | x3erpv12sqlvm:20101 | | | 97fc2e48552d | 8c98057d076f | 69 |
| X3V12 | 2721 | AWRKSIGV | SEED | Success | 2023-11-09T14:58:25.336Z | 2023-11-09T14:58:32.798Z | x3erpv12sqlvm:20101 | BATCH | | 0d2754d20bd9 | 8c98057d076f | 88 |
| X3V12 | 2719 | ACCBATCH1 | SEED | Success | 2023-11-09T14:57:25.296Z | 2023-11-09T14:57:28.108Z | x3erpv12sqlvm:20100 | | | 2571d31dc246 | 8c98057d076f | 69 |
| X3V12 | 2718 | ACCBATCH1 | SEED | Success | 2023-11-09T14:56:25.300Z | 2023-11-09T14:56:29.750Z | x3erpv12sqlvm:20101 | | | 3b43a6e2f212 | 8c98057d076f | 90 |
| X3V12 | 2716 | AWRKSIGV | SEED | Success | 2023-11-09T14:56:25.299Z | 2023-11-09T14:56:31.933Z | x3erpv12sqlvm:20101 | BATCH | | 0b003b7d38d1 | 8c98057d076f | 85 |
| X3V12 | 2717 | AWRKSIG | SEED | Success | 2023-11-09T14:56:25.299Z | 2023-11-09T14:56:31.581Z | x3erpv12sqlvm:20101 | | | dca0fbc89f6 | 8c98057d076f | 83 |
| X3V12 | 2715 | ACCBATCH1 | SEED | Success | 2023-11-09T14:55:25.274Z | 2023-11-09T14:55:28.347Z | x3erpv12sqlvm:20100 | | | 21e5a3700011 | 8c98057d076f | 44 |
| X3V12 | 2713 | AWRKSIGV | SEED | Success | 2023-11-09T14:54:25.279Z | 2023-11-09T14:54:31.985Z | x3erpv12sqlvm:20101 | BATCH | | b3f44efef36f | 8c98057d076f | 43 |
| X3V12 | 2714 | ACCBATCH1 | SEED | Success | 2023-11-09T14:54:25.279Z | 2023-11-09T14:54:29.572Z | x3erpv12sqlvm:20101 | | | 956eaf8e76d1 | 8c98057d076f | 69 |
| X3V12 | 2712 | AWRKSIG | SEED | Success | 2023-11-09T14:54:25.278Z | 2023-11-09T14:54:32.141Z | x3erpv12sqlvm:20101 | | | b0d4c5a6deb9 | 8c98057d076f | 75 |
| X3V12 | 2711 | ACCBATCH1 | SEED | Success | 2023-11-09T14:53:25.277Z | 2023-11-09T14:53:28.113Z | x3erpv12sqlvm:20100 | | | 4824699f0da | 8c98057d076f | 59 |
| X3V12 | 2710 | ACCBATCH1 | SEED | Success | 2023-11-09T14:52:25.364Z | 2023-11-09T14:52:30.240Z | x3erpv12sqlvm:20101 | | | ae432bf1a1c5 | 8c98057d076f | 77 |
| X3V12 | 2708 | AWRKSIG | SEED | Success | 2023-11-09T14:52:25.363Z | 2023-11-09T14:52:32.298Z | x3erpv12sqlvm:20101 | | | 86ebf8adb003 | 8c98057d076f | 86 |
| X3V12 | 2709 | AWRKSIGV | SEED | Success | 2023-11-09T14:52:25.363Z | 2023-11-09T14:52:32.335Z | x3erpv12sqlvm:20101 | BATCH | | a36b3bbcd471 | 8c98057d076f | 84 |

Runtime Tags For Batch Tasks

Runtime Tags for Tasks

When working with a X3 solution that has access to multiple runtimes, we can now direct our tasks to the runtime of our choice per task.

Runtimes

Enable application cluster
✓
Enabling this option requires a dedicated prelimi...

Sage X3 runtimes

Please input text here

| Server host | Server port | Tags | Tag exclusive | Ban timeout | Black listed | Auto config | Disabled |
|---------------|-------------|-------|---------------|-------------|--------------|-------------|----------|
| x3erpv12sqlvm | 20100 | MAIN | x | 5 | x | ✓ | x |
| x3erpv12sqlvm | 20101 | BATCH | x | 5 | x | ✓ | x |

- This can be useful if you need some of your batch activity to execute on a runtime situated in different time zones if you're a multi-time zone business
- If you need to dedicate a runtime to certain types of batch jobs, maybe those that consume a large number of resources or would run for an extended period of time

Runtime Tags for Tasks

In previous versions the only option available was to specify a runtime tag at the batch controller level and all tasks would be executed on the specified runtime

The screenshot shows the Sage X3 administration interface. At the top, the navigation bar includes the Sage logo, 'X3', and user information: 'Super administrator', 'Super administrator', and 'SEED'. The breadcrumb trail is 'All > Administration > Administration > Endpoints'. The main content area is titled 'X3 batch controller X3V12' and features a tabbed interface with 'Activity log' selected. The activity log table contains the following data:

| Information | Activity log | X3 execution setting | Activity setting | Runtimes |
|---------------------|--------------|--------------------------|--------------------------|---|
| 2856 ACCBATCH1 SEED | Success | 2023-11-09T16:10:04.159Z | 2023-11-09T16:10:06.858Z | x3erpv12sqlvm:20100 5896 a8db1ef8-b22f-47aa-882a-36842b3530e8 |
| 2853 AWRKSIG SEED | Success | 2023-11-09T16:09:04.061Z | 2023-11-09T16:09:10.981Z | x3erpv12sqlvm:20100 8328 f63351b2-1de4-41ef-abf2-2da4af45023d |
| 2854 AWRKSIGV SEED | Success | 2023-11-09T16:09:04.061Z | 2023-11-09T16:09:11.134Z | x3erpv12sqlvm:20101 8336 BATCH 50273cda-1acc-4334-9cd4-86587a579bb7 |
| 2855 ACCBATCH1 SEED | Success | 2023-11-09T16:09:04.061Z | 2023-11-09T16:09:08.719Z | x3erpv12sqlvm:20100 8600 9e5a1739-f979-4393-a19c-add7688defcf |

Below the table is the 'X3 execution setting' configuration panel. It includes fields for 'X3 solution *' (X3V12), 'User' (admin), 'Role' (Super administrator), and 'Locale preference *' (English (United States)). A highlighted 'X3 runtime tags' field is empty, with a tooltip stating: 'Comma-separated tags can be used to select your preferred X...'. The 'Administrative endpoint' field contains 'X3V12 / X3'.

On the right side, there is a vertical sidebar with the following menu items: Save, Detail, X3 batch controllers, Help, Start, Stop, Stop All, Synchronise configuration, X3 server traces, Queries management, Queries log, and Controller logs.

Task Management

In the task management function (GESABT) when we select a task, we have an execution tag field where we can specify the runtime we want to direct this task to. If the value is blank the task will be directed to the main runtime.

The screenshot shows the 'Task Management' interface for a task named 'AWRKSIGV'. The 'Description' is 'Remote signatures'. The 'Module' is 'Supervisor'. The 'Execution tag' field is highlighted with a blue box and contains the value 'BATCH'. Other fields include 'Task Code', 'Task Type' (Processing), 'Time-out (Minutes)', 'Allowable delay (minutes)', 'Authorisation level', 'Hourly constraints', 'Function', and 'Script'.

The execution tag is set to 'BATCH' when the task is scheduled or executed it is directed to this runtime.

Queries logs

Cancel sort

20 Results Display: 50

| Number | Task code | Folder | Status | Started at | End at | Message | Runtime | X3 Pid | Task tag | X3 session |
|--------|-----------|--------|---------|--------------------------|--------------------------|---------|---------------------|--------|----------|--------------|
| 2902 | AWRKSIGV | SEED | Success | 2023-11-09T16:33:04.195Z | 2023-11-09T16:33:11.458Z | | x3erpv12sqlvm:20101 | 7184 | BATCH | 256ce7f0da4b |
| 2898 | AWRKSIGV | SEED | Success | 2023-11-09T16:31:04.082Z | 2023-11-09T16:31:10.990Z | | x3erpv12sqlvm:20101 | 8272 | BATCH | 61f13725455b |
| 2894 | AWRKSIGV | SEED | Success | 2023-11-09T16:29:04.062Z | 2023-11-09T16:29:11.000Z | | x3erpv12sqlvm:20101 | 6404 | BATCH | 911297f3853e |
| 2889 | AWRKSIGV | SEED | Success | 2023-11-09T16:27:04.065Z | 2023-11-09T16:27:11.946Z | | x3erpv12sqlvm:20101 | 7276 | BATCH | 0a61bae4cd1f |
| 2886 | AWRKSIGV | SEED | Success | 2023-11-09T16:25:04.142Z | 2023-11-09T16:25:10.915Z | | x3erpv12sqlvm:20101 | 8024 | BATCH | 9b9544003136 |

Task Groups

The execution tag can be specified for a group of tasks. In this example, you can see that the execution tag is set as MAIN however DOSSVG in the grid the execution tag is automatically set to BATCH

- If no tag is set in task management for the task the tag specified in the group is used.
- The tag specified in task management overrides the tag specified in the group of tasks.

The image displays two screenshots from the Sage X3 interface, illustrating task group configuration and task management.

Left Screenshot: Groups of Tasks

Group: BACKUP | Description: Backup

Characteristics:

- Active:
- Module: Supervisor
- Authorisation level: []
- Hourly constraints: []
- Proceed if error:
- Execution tag: MAIN

Tasks:

| Sequence | Task Code | Description | Execution tag |
|----------|-----------|-------------------|---------------|
| 1 | 10 DOSSVG | Data Extract | BATCH |
| 2 | 20 DOSREC | Data Import | |
| 3 | 30 VALDOS | Folder Validation | |
| 4 | | | |

Right Screenshot: Task Management

Task Code: DOSSVG | Description: Data Extract

Module: Supervisor | Execution tag: BATCH

Active:

Task Type: Processing, Script

Time-out (Minutes): [] | Allowable delay (minutes): [] | Authorisation level: [] | Hourly constraints: []

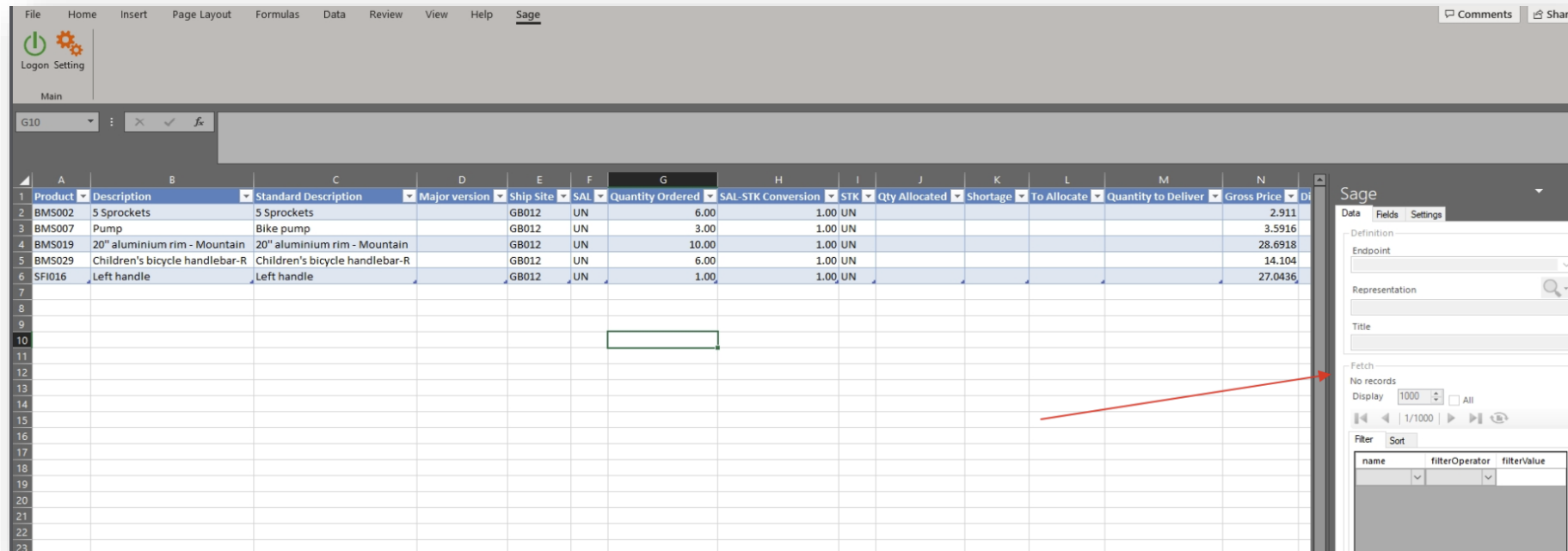
Function: DOSEXTRA | Script: []

Multi-folder: | Single User: | Message - User:

Excel Add-in Improvements

Excel Add-in Improvements

Previously the Excel add-in used the right panel which contained the server settings as well as the data source settings.

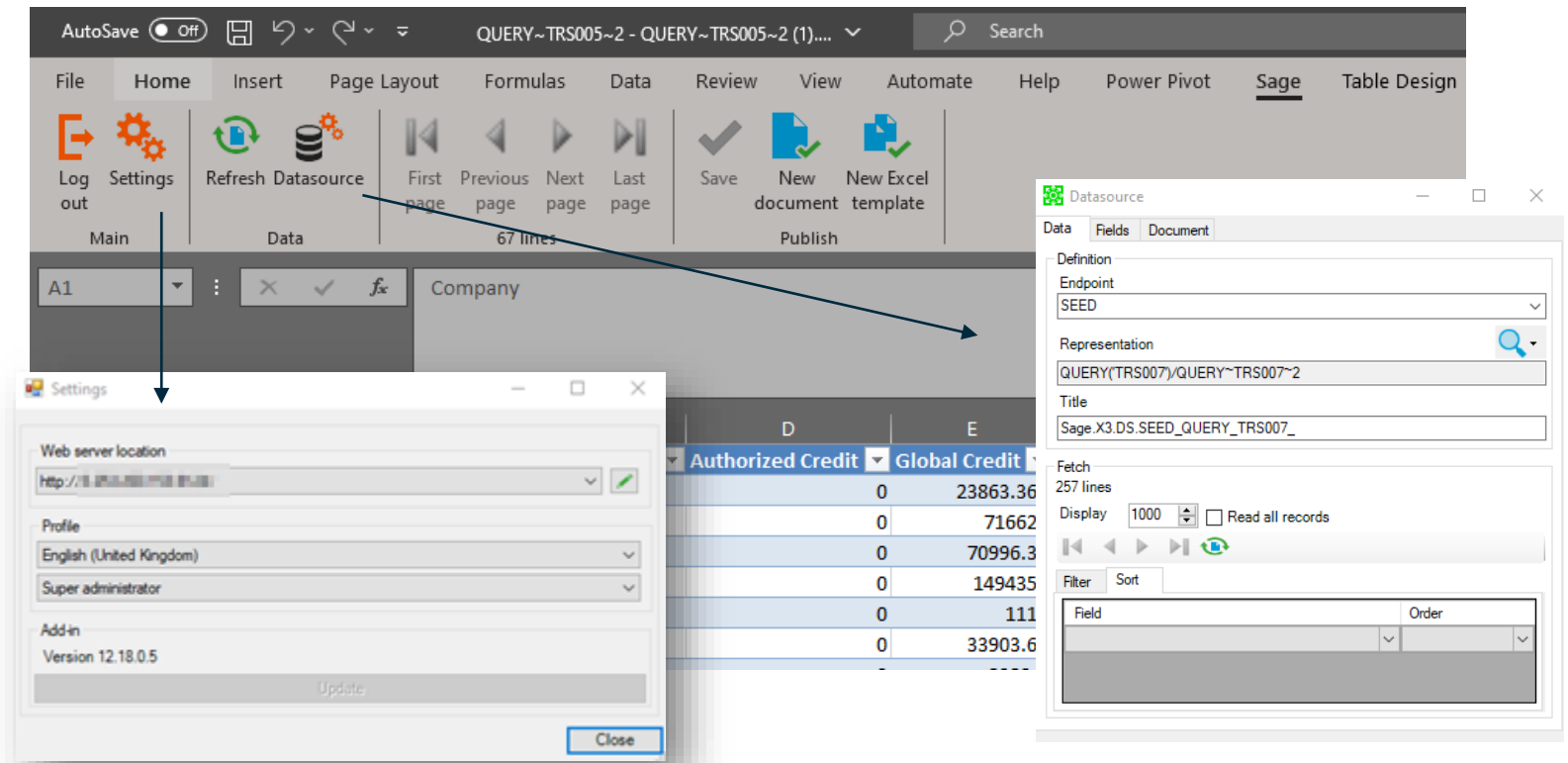


The synchronisation of the right panel posed a challenge, particularly when users switched between active worksheets. Given the intricate nature of the worksheets exported from Sage X3 and the potential for a substantial number of concurrently open worksheets, the user experience suffered. The constant synchronisation of the right did not provide a good user experience.

Excel Add-in Improvements

The user interface for the Microsoft Excel Add-in now has an improved ribbon and a more consistent experience for the user, providing much easier authentication and setup flows.

- Settings opens a new dialogue to specify the server settings
- The Data source button opens its own dialogue
- You can now save your exports to Excel without the need to immediately log in when you open the spreadsheet.
- If the sheet was manipulated offline when you press refresh, it will revert back to the template and re-populate the data.



Print Server Improvements 2.29

Print Server Improvements

This function displays and manages the tasks within a specific print server. It allows users to view tasks, and delete tasks. The displayed information shows the print server's configuration, including the maximum number of simultaneous processes for parallel printing, the maximum length of the request stack, and details about connected clients, their IP addresses and connection dates. The function provides a grid presenting information about known print requests, providing a visualisation of the print server's state.

Printouts, Printouts, Print Supervision (PSIMP)

- Printouts
 - Printouts
 - Printouts
 - View a group of requests
 - Print supervision** ★
- Prints/group
 - Supervisor
- Purchasing
 - External documents
 - Internal documents

The screenshot shows the Sage X3 Print supervision interface. The top navigation bar includes the Sage logo, X3 version, and user roles (Super administrator). The main content area is titled "Print supervision" and contains several sections:

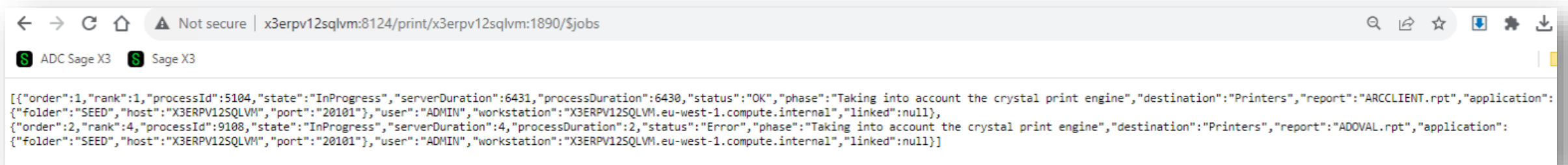
- Server:** A search box containing "x3erpv12sqlvm:1890".
- Configuration:** A table with columns for Configuration code, Max. nb of simultaneous processes, Max. size of request stack, and Number of clients connected. The values are DEFAULT, 2, 200, and 4 respectively.
- Clients connected:** A table with columns for Client and Connection date. It lists five clients with IP address 10.1.36.246, all connected on 13/11/2023 at 14:50.
- Tasks:** A table with columns for Order, Job, User, Report, Application, Phase, S..., Wait (sec), Execution (sec), and Destination. It shows two tasks, with the first one in progress.

The right sidebar contains utility and help options: UTILITIES, BROWSING (Printouts), HELP (Field help, Function help, Record help), and DIAGNOSIS... A "Refresh" button is located at the top right of the main content area.

Print Server Improvements

In the Print supervision function (PSIMP), a new functionality has been added where you can now more effectively monitor your printing. The function relies on having the print server 2.29 Implemented and Syracuse 12.19 (2023 R2)

- PSIMP can be customised to show the jobs you need using new console parameters
- Completed Jobs can now also be viewed previously Jobs would disappear once the status is completed
- Cancelled or On Error, jobs would stay in the task window for a long period of time or until the print server service was restarted. Many failures would sometimes cause issues printing from Sage X3.
- A new feature in Syracuse allows you to access PSIMP data using a rest interface Example URL [http://x3erpv12sqlvm:8124/print/x3erpv12sqlvm:1890/\\$jobs](http://x3erpv12sqlvm:8124/print/x3erpv12sqlvm:1890/$jobs). This could be potentially used to build a monitoring tool outside of Sage X3.



The screenshot shows a web browser window with the address bar containing the URL `x3erpv12sqlvm:8124/print/x3erpv12sqlvm:1890/$jobs`. The browser tabs show "ADC Sage X3" and "Sage X3". The main content area displays a JSON array of print job details:

```
[{"order":1,"rank":1,"processId":5104,"state":"InProgress","serverDuration":6431,"processDuration":6430,"status":"OK","phase":"Taking into account the crystal print engine","destination":"Printers","report":"ARCCLIENT.rpt","application":{"folder":"SEED","host":"X3ERP12SQLVM","port":"20101"},"user":"ADMIN","workstation":"X3ERP12SQLVM.eu-west-1.compute.internal","linked":null}, {"order":2,"rank":4,"processId":9108,"state":"InProgress","serverDuration":4,"processDuration":2,"status":"Error","phase":"Taking into account the crystal print engine","destination":"Printers","report":"ADOVAL.rpt","application":{"folder":"SEED","host":"X3ERP12SQLVM","port":"20101"},"user":"ADMIN","workstation":"X3ERP12SQLVM.eu-west-1.compute.internal","linked":null}]
```

Print Supervision (PSIMP)

PSIMP allows you to visualise for the selected print server the list of tasks pending and finished

The screenshot shows the Sage X3 Print Supervision interface. At the top, there is a navigation bar with 'Sage X3' and user roles 'Super administrator' and 'SEED'. Below the navigation bar, there are breadcrumb links 'All > Printouts > Printouts' and a title 'Print supervision' with sorting icons. The main content area is divided into three sections: 'Server', 'Configuration', and 'Tasks'. The 'Server' section has a search box containing 'x3erpv12sqlvm:1890'. The 'Configuration' section shows settings for 'Configuration code' (DEFAULT), 'Max. nb of simultaneous processes' (5), 'Max. size of request stack' (300), and 'Number of clients connected' (1). The 'Clients connected' section shows a table with columns 'Client' and 'Connection date', containing one entry: '10.1.56.149' connected on '10/11/2023 10:27'. The 'Tasks' section shows a table with columns: 'O...', 'J...', 'User', 'Report', 'Application', 'Phase', 'Status', 'Wait (sec)', 'Execution (...)', 'Destin...', 'Processes', 'Client Workstation', and 'Linked job'. The tasks table contains three rows of data.

| O... | J... | User | Report | Application | Phase | Status | Wait (sec) | Execution (...) | Destin... | Processes | Client Workstation | Linked job |
|------|------|------|--------|-------------|----------------|-------------|------------|-----------------|-----------|-----------|---------------------|------------|
| 1 | 1 | 3 | ADMIN | ARCCLIENT | SEED:X3ERP125C | In progress | 2 | 811 | 811 | 5368 | X3ERP125QLVM.eu-wes | |
| 2 | 2 | 4 | ADMIN | ARCCLIENT | SEED:X3ERP125C | Finished | | 100 | 5 | | X3ERP125QLVM.eu-wes | |
| 3 | 3 | 5 | ADMIN | ARCREV | SEED:X3ERP125C | Finished | | 71 | 15 | | X3ERP125QLVM.eu-wes | |

Print server

The client workstation, which has launched the request

In the tasks section, we can now see the finished and in-process jobs.

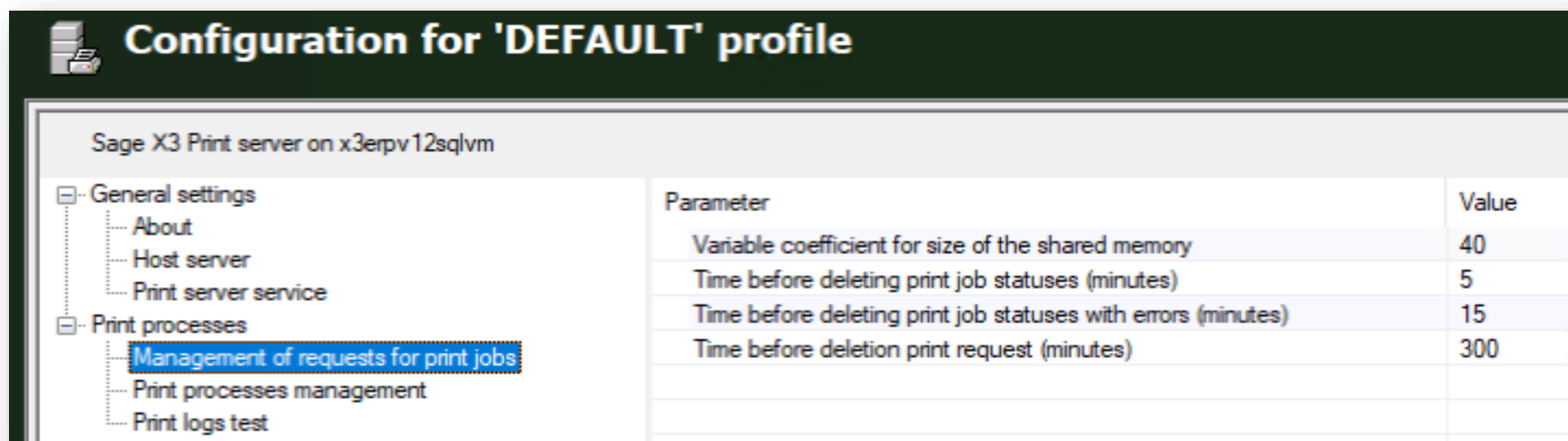
Full list of phases can be found online <https://online-help.sageerp3.com/erp/12/staticpost/print-supervision/>

Console Parameters

Two new parameters have been added in the console to customise the behaviour in Print server supervision

Time before deleting print job status - Time before automatically removing a successfully completed print job, expressed in minutes. Default value: 0 minutes. Purge condition: the printout is not in 'execution' mode status is completed.

Time before deleting print job status with error - Time before automatically deleting statuses of print jobs with errors, expressed in minutes. Default value: 15 minutes. Condition for purging a status: the printout is not in 'execution' mode after more than the delay expressed here, with errors.



Configuration for 'DEFAULT' profile

Sage X3 Print server on x3erpv12sqlvm

| Parameter | Value |
|---|-------|
| Variable coefficient for size of the shared memory | 40 |
| Time before deleting print job statuses (minutes) | 5 |
| Time before deleting print job statuses with errors (minutes) | 15 |
| Time before deletion print request (minutes) | 300 |
| | |
| | |

Expert mode in the console

Elasticsearch Support

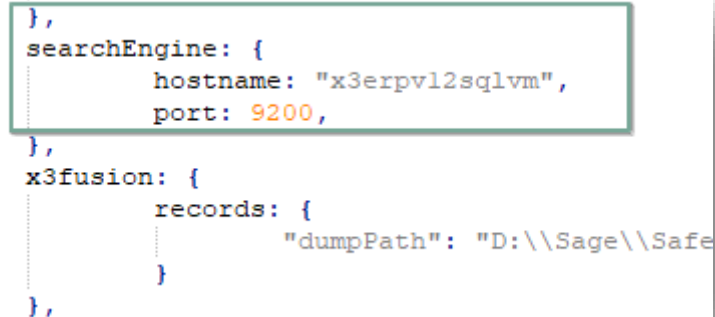
Elasticsearch

Previously we have only been able to use on-premise Elasticsearch component versions 6 and 7 without secure connections.

Documented in the prerequisites [Prerequisites overview \(sageerpx3.com\)](https://sageerpx3.com)

| | | |
|---------------|--|--|
| Elasticsearch | 1.5.* | 2.4 |
| | 6.4 since Syracuse 11.17 in V11.0.14 | 6.4 since Syracuse 12.3 in release 2019 R3/V12.0.18 |
| | 6.8 since Syracuse 11.20 in V11.0.16 | 6.8 since Syracuse 12.6 in release 2020 R1/V12.0.21 |
| | 7.16 since Syracuse 11.24 in Sage X3 Warehousing V11.0.10/Sage X3 V11.0.19 | 7.16 since Syracuse 12.9 in release 2020 R4/V12.0.24 |

In earlier versions, the connection configuration was completed from the Syracuse nodelocal.js file by adding a search engine element containing the hostname and the configured port.



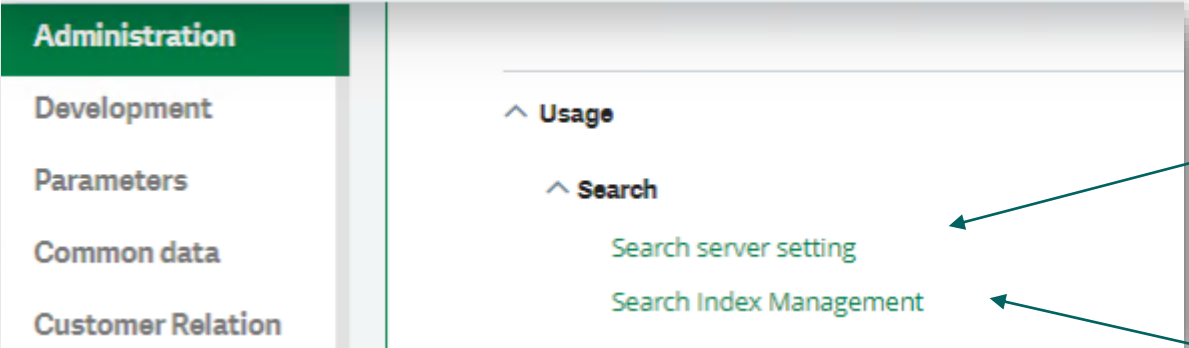
```
},
searchEngine: {
  hostname: "x3erpvl2sqlvm",
  port: 9200,
},
x3fusion: {
  records: {
    "dumpPath": "D:\\Sage\\Safe
  }
},
```

This configuration method will no longer be supported from 2023R2

Elasticsearch

We can now use secure connections to Elasticsearch so we can utilize the Elastic Cloud offering. Support for version **8** has also been introduced.

In **Administration > Usage > Search**, A new function has been added in Syracuse to manage the connection.



Allows you to configure your connection to the Elasticsearch on-premise or cloud instance.

Search Index management is used to configure the index update settings.

[Elastic 8.0: A new era of speed, scale, relevance, and simplicity | Elastic Blog](#)

Elasticsearch Configuration Settings

The screenshot shows the Sage X3 Administration console with the following configuration details:

- Search settings** (Navigation: All > Administration > Usage > Search)
- Version:** Version 8 (selected), Version 7, Version 8 (highlighted)
- Connection mode:** On-premise server
- Host *:** localhost
- Port *:** 9200
- Proxy:** (empty field)
- Enable security:**
- TLS authentication:** CA certificates of search server (empty), Client certificate (empty)
- User authentication:** Authentication mode: No authentication
- Setting:** Request timeout (ms): 30000, Index name prefix: (empty)

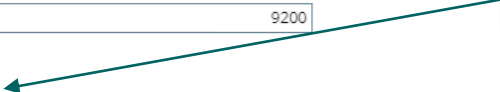
Select the Elasticsearch version



Connection mode- Option to use on-premise or Elastic Cloud



Security enables you to secure a connection if this has been setup in your Elastic search installation.



To secure connection using certificates and configure the credentials for the secure connections



Timeout Setting & the option to set a prefix for the Index



<https://www.elastic.co/guide/en/elasticsearch/reference/master/secure-cluster.html>

SQL Server Secured

SQL Server Connection Encryption

Encrypting the runtime connection to the SQL Server is now a possibility with the introduction of connection encryption and trust server certificate parameters in the console.

Connection Encryption -

Specifies whether connections use TLS encryption over the network.

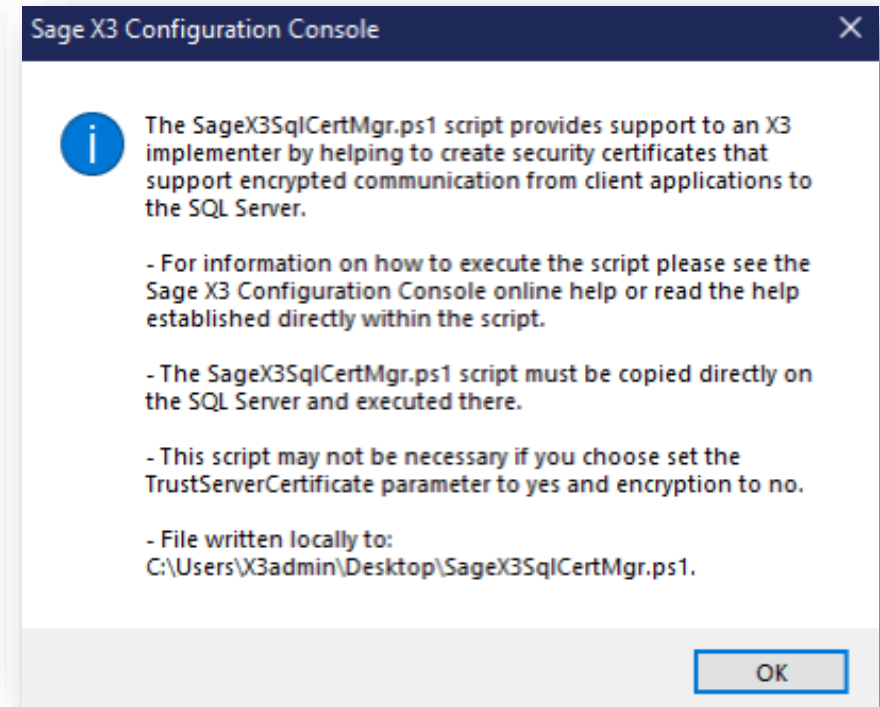
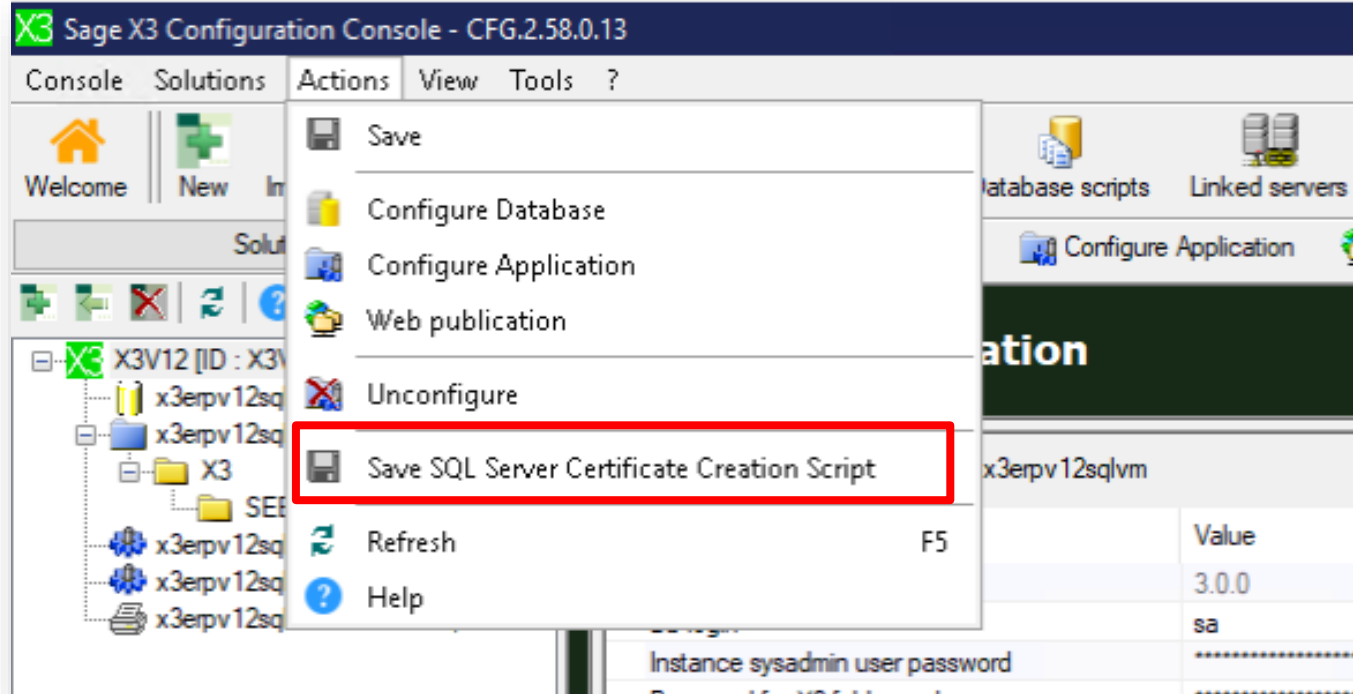
Trust Server Certificate - set to no, the server certificate will be validated. Setting to yes will bypass walking the certificate chain to validate trust.

| Parameter | Value |
|------------------------------------|--|
| Version | R096.001.00206 |
| Installation path | D:\Sage\X3V12\runtime |
| pwsh[.exe] executable fullpath | C:\Program Files\PowerShell\7\pwsh.exe |
| Connection Encryption | No |
| Trust server certificate | No |
| Sage X3 service port number | 20100 |
| User login for the Sage X3 service | x3run |
| User account password | |

SQL Server Connection Encryption

The steps to create a certificate will be documented in the console help and a script will also be provided to simplify the steps which you will be able to download from the console.

Keep in mind that there is configuration that needs to be completed with the SQL server like setting permissions for the service to access certificates & and settings to protocols.



Other Changes

Other Changes

- Term Multithreading in the console screens and help has been replaced with parallelized because the tables are imported in parallel rather than using multithreading.
- Parallelized options are now also available when your Runtime is hosted on Linux for exporting and importing data.
- Runtime now requires the SQL PowerShell module version 22.1.1, previously only supported version 21

Appendices



Useful Links

| Resource | Link |
|-----------------------------------|--|
| Sage X3 Release notes | All V12 release notes |
| Prerequisites information for V12 | Prerequisites overview |
| Technical online help | Technical help |
| Microsoft Graph API Help & tools | Microsoft Graph APIs - Microsoft learn |
| SQL Connection Encryption | ODBC DSN and connection string - ODBC Driver for SQL Server Microsoft Learn Using connection string keywords - SQL Server Native Client Microsoft Learn |

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|  | Thursday, November 30 th | 9 am | 2 | 116123 |
|  | Thursday, November 30 th | 4 pm | 2 | 116124 |
|  | Tuesday, December 5 th | 10 am | 2 | 116125 |
|  | Thursday, December 21 st | 9h30 am | 2 | 116126 |

Thank you!

