**Product:**
WEG project
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**Document date:**
3 August 2015
**Document version:**
1.0
**Document name:**
WEG Project documentation

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PDMX

# WEG PROJECT DOCUMENTATION

AUGUST 2015

produmex
a Movilitas company

# Revision history

| Version | Subject | Author | Date |
|---------|---------|--------|------|
| 1.0 | Attachment synchronization tool | Martin De Corte | 25 June 2015 |
| 2.0 | WEG add-on plugin installation | Martin De Corte | 03 August 2015 |

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# 1. Installation

## 1.1. Components and files

The "Produmex for WEG" solution consists of a number of components, which are themselves packaged into a number of files:
- The Produmex add-on installation files
  - Possible formats:
    - Produmex_PNG_5_3_1_xxx.7z
    - Produmex_PNG_5_3_1_xxx.zip
    - Produmex_PNG_xxxx.7z (test versions only)
    - Produmex_PNG_xxxx.zip (test versions only)
  - Contents:
    - The standard Produmex add-on (called "Produmex add-on")
- The custom WEG project installation files
  - Possible formats:
    - Project_WEG_1_0_0_xxx.7z
    - Project_WEG_1_0_0_xxx.zip
  - Contents
    - A custom Produmex add-on plugin, specific to WEG (called "WEG add-on plugin")
    - A number of external tools, specific to WEG (called "WEG tools")

## 1.2. Architecture

For information about the standard Produmex add-on's architecture, please refer to the standard Produmex add-on documentation.

The WEG add-on plugin is installed together with the standard Produmex add-on. It copies WEG specific libraries (dll files) to the appropriate folders, ensuring that the standard Produmex add-on will load these libraries when starting up. As a result, only 1 Produmex add-on will be executed, which contains both standard and custom functionality.

Workflow customizations are delivered in the form of workflow source code. During the installation, custom workflows are uploaded and compiled to the database. This way, the Produmex fat client will use any workflow customization that has been included during the installation.

External tools (e.g. attachments synchronization) are copied into the `%PROGRAMFILES(X86)%\Produmex\Produmex Tools\` folder during the installation, each to a separate folder. They can be executed manually or via shortcuts, and they can also be scheduled with the Windows task scheduler. Each of these external tools has its own configuration file.

## 1.3. Installation process
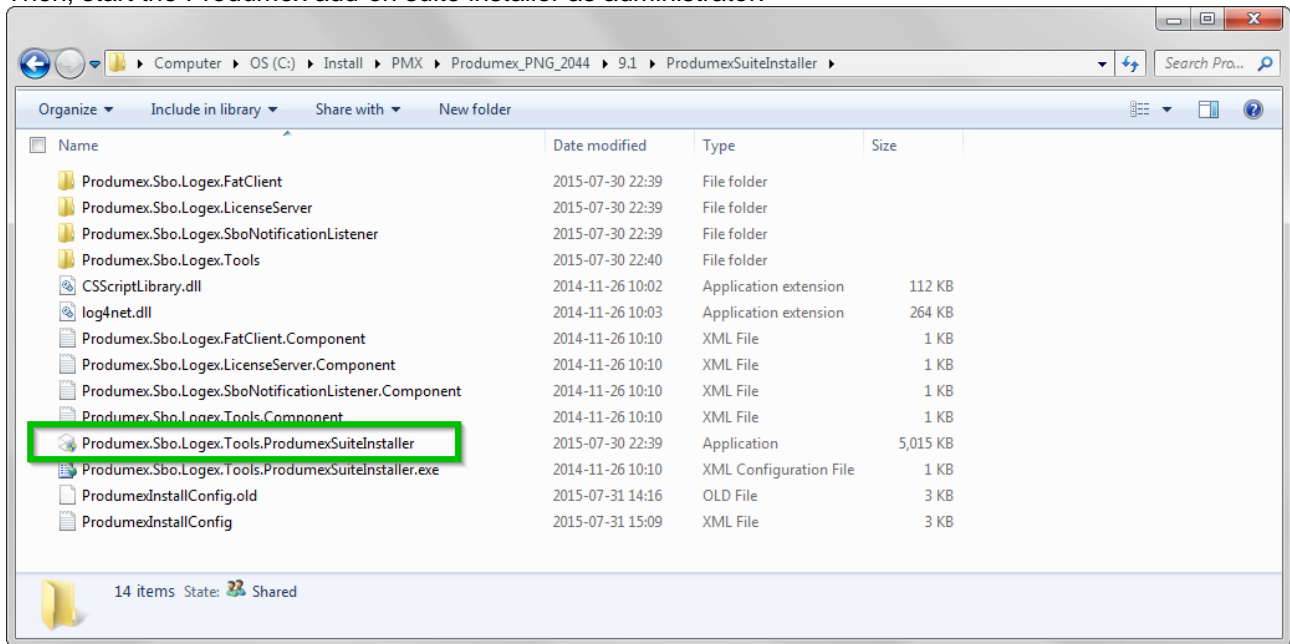
### 1.3.1. Prerequesites

For the installation, you need:

- The Produmex add-on installation files
- The custom WEG project installation files
- Access to a SAP B1 company database
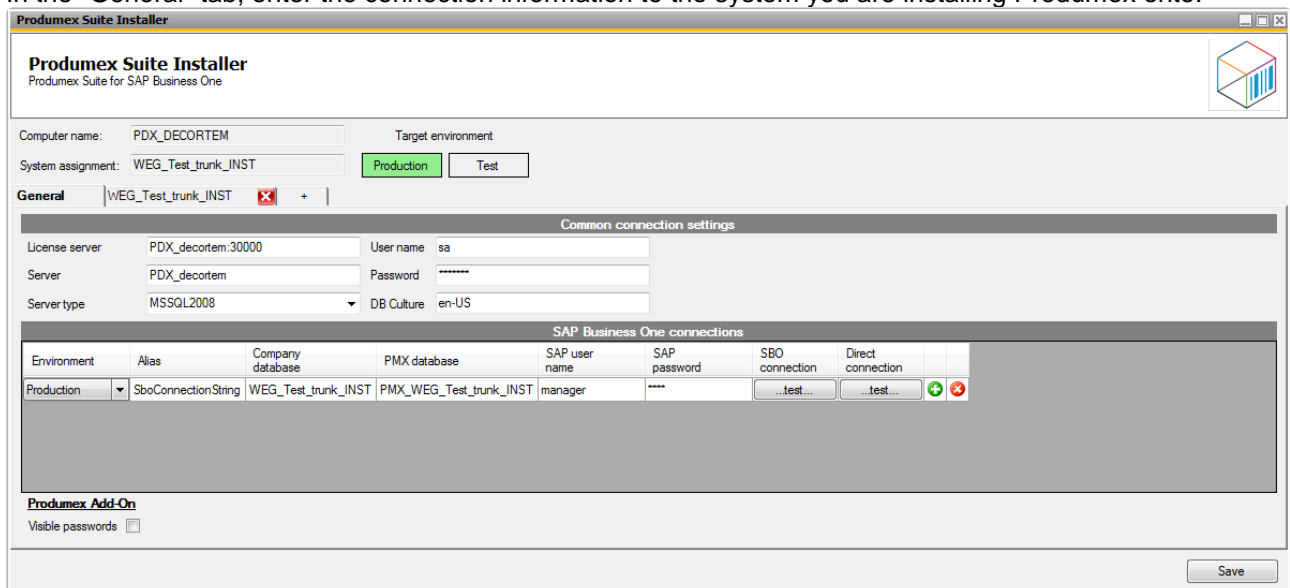
## 1.3.2. Start up the Produmex Suite Installer

First, extract both installation files, each to a separate folder.

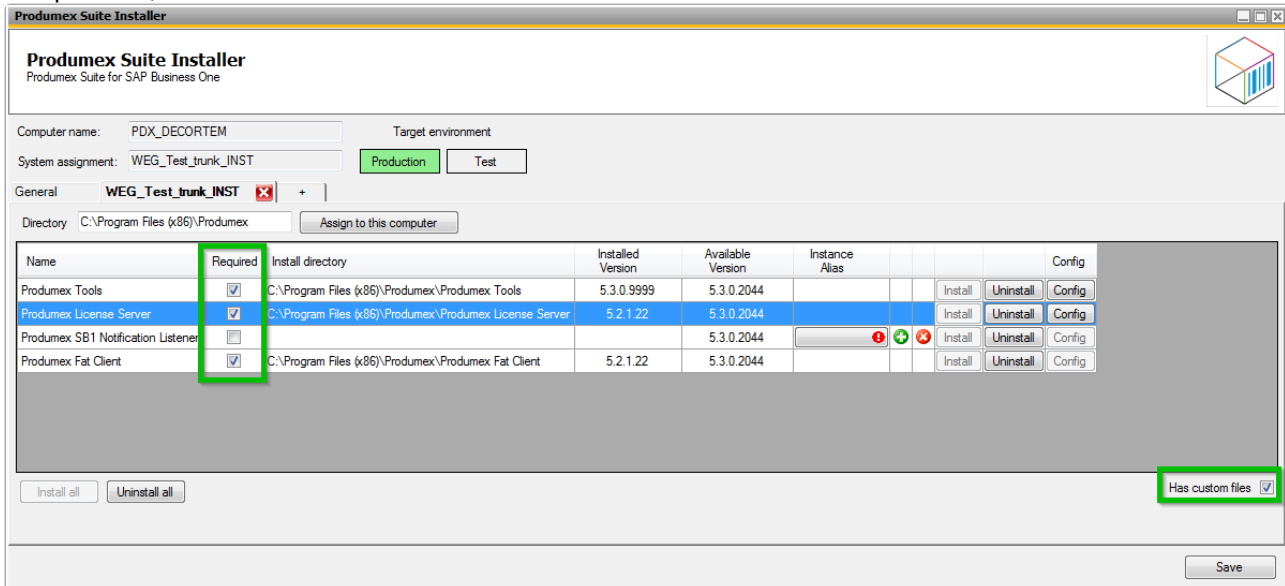Then, start the Produmex add-on suite installer as administrator:



## 1.3.3. Set up the server access information

In the "General" tab, enter the connection information to the system you are installing Produmex onto:
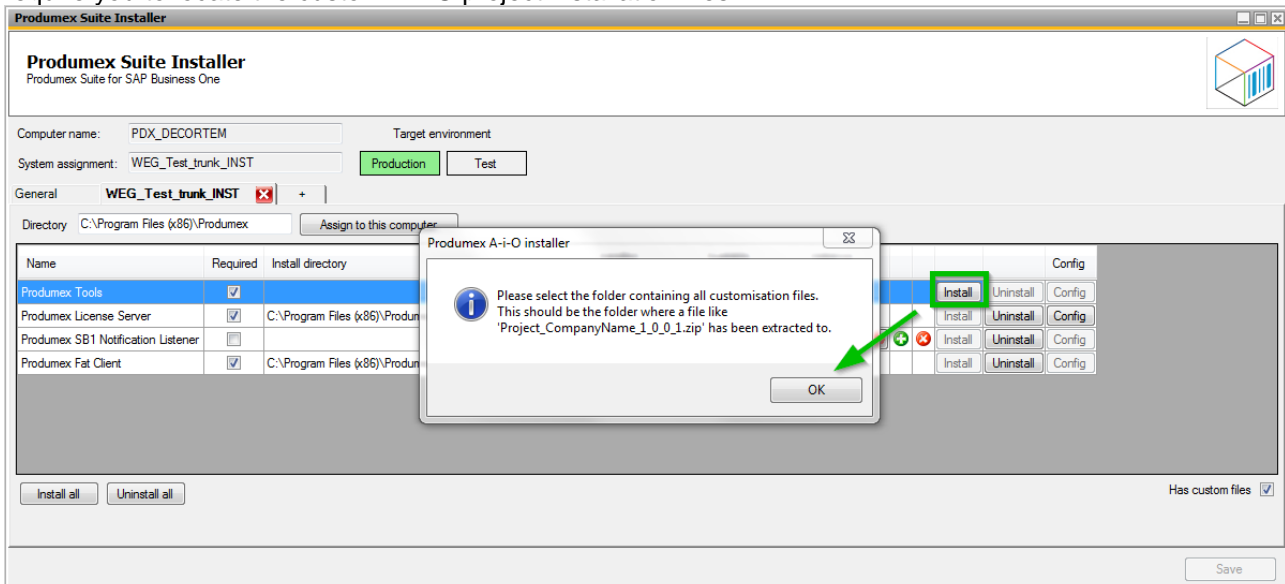
### 1.3.4. Open or create a system

Open an already configured system, or create a new system by pressing the '+' button, select the required components, and enable the "Has custom files" checkbox:
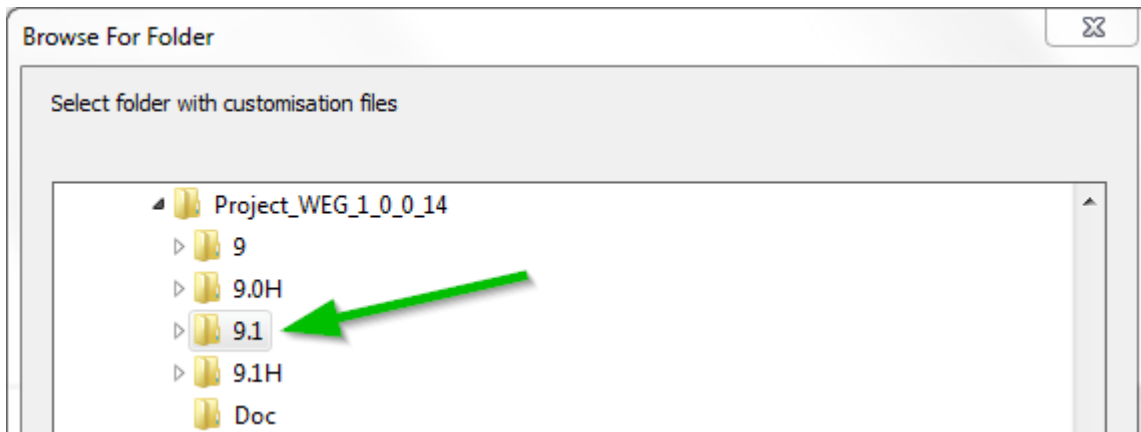


### 1.3.5. Upgrade all components

If necessary, uninstall the outdated components, then install the new versions. At that step, the installer will require you to locate the custom WEG project installation files:
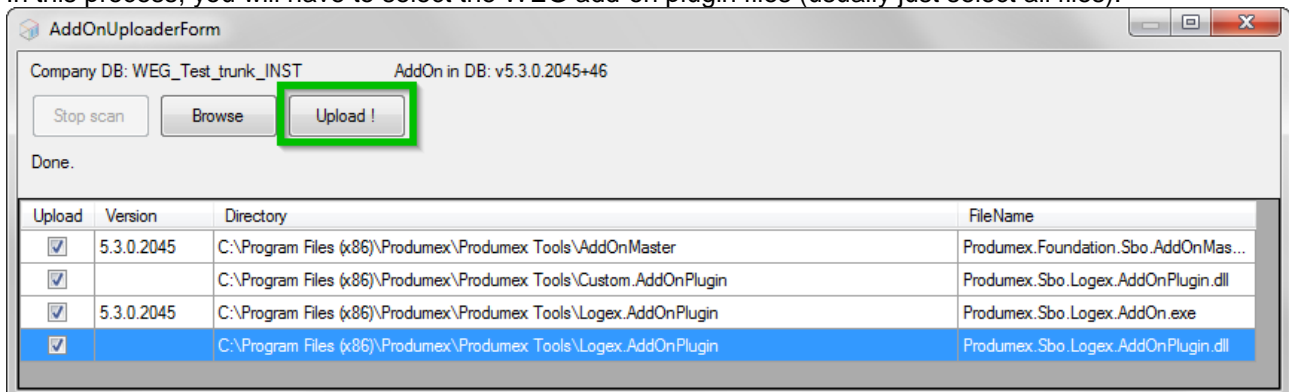


Locate the folder where you extracted the WEG project installation files, and select the folder corresponding to the SAP B1 version you are installing the system onto:
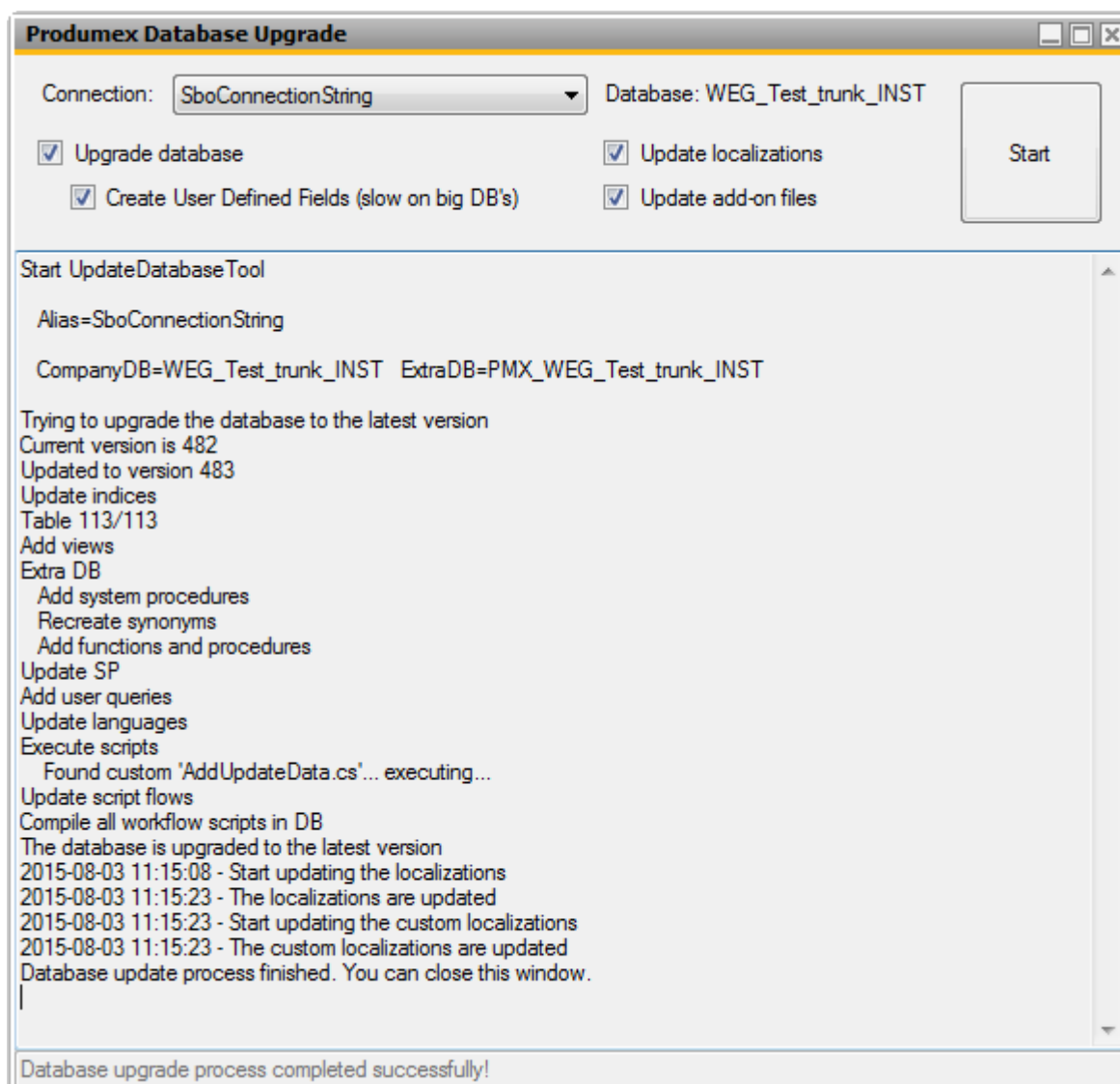
## 1.3.6. Upgrade the database

When all components are installed, you have to upgrade the database. This step will create any missing fields or tables, update the localizations and recompile the workflows according to the newest source code. To do so, click on the "Config" button in the line of "Produmex Tools", and execute the "Produmex Database Upgrade" tool.

In this process, you will have to select the WEG add-on plugin files (usually just select all files):



At the end of the process, you should get the following screen, at this step the installation is finished and you can close the screen.

## 1.3.7. Restart the Produmex license server

If you have upgraded it, you will have to restart manually the Produmex license server.

# 2. Attachments uploader tool

## 2.1. Installation

### 2.1.1. Installing the tool

In the installation archive, you will find 2 folders called 9.1 and 9.1H. The folder called 9.1 contains the version for MSSQL, and the folder called 9.1H contains the version for HANA.

You need to extract the "Tools" folder from the correct folder in the archive to any location (e.g. %PROGRAMFILES%\Produmex\WEG Attachments Uploader).

### 2.1.2. Configuring the database on MSSQL

For MSSQL, you need to create the custom stored procedure that you will find in the SQL folder: PMX_SP_WegPreTransactionNotification.sql

1. First, execute the file in the company database. This will create the procedure that prevents users from updating purchases orders when not allowed.
2. Then, copy the part at the bottom of the stored procedure into the SBO_SP_TransactionNotification procedure. This will enable the custom procedure and ensure it's executed every time a purchase order is updated.

### 2.1.3. Configuring the database on HANA

For HANA, first you need to execute the file called PMX_SP_PrepareDBForAttachmentSync.sql, which you will find in the SQL folder. This will create some SQL types, functions and temporary tables that are necessary for the stored procedure to work correctly.

Then, you need to create the stored procedure that you will find in the SQL folder: PMX_SP_WegPreTransactionNotification.sql

1. First, execute the file in the company database. This will create the procedure that prevents users from updating purchases orders when not allowed.
   ➔ You might need to first execute the following command, if an older version of the procedure already existed:
   ```
   DROP PROCEDURE "PMX_SP_WegPreTransactionNotification";
   ```
2. Then, copy the part at the bottom of the stored procedure into the SBO_SP_TRANSACTIONNOTIFICATION procedure. This will enable the custom procedure and ensure it's executed every time a purchase order is updated.

## 2.2. Configuration

You need to edit the configuration file: Produmex.Sbo.Logex.WEG.AttachmentsUploader.exe.config

The following sections need to be adapted:

- In the appSettings section, you will find the FTP connection information:

```
<add key="FTPConnection.Address" value=""/>
<add key="FTPConnection.Mode" value="active"/>
<add key="FTPConnection.User" value=""/>
<add key="FTPConnection.Password" value=""/>
```

- In the connectionStrings section, you will find the connection string:

```
<add name="SboConnectionString"
connectionString="Server=localhost;CompanyDB=SBODemo_US;UseTrusted=False;D
bUserName=sa;DbPassword=B1Admin;UserName=manager;Password=produmex;Pooling
=True;MinPoolSize=2;MaxPoolSize=10;ServerType=MSSQL2005;DBCultureInfo=en-
US;LicenseServer=localhost:30000" />
```

You might also want to configure a scheduled task (using the standard Windows tools) to automate the execution of the tool (see next section).

## 2.3. Usage

The tool is executed when the main executable, Produmex.Sbo.Logex.WEG.AttachmentsUploader.exe, is started. When started, it will search for all purchase orders to process, then it will exit automatically.

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