Update instructions for abas DMS Gen. 2 (PROXESS release 2022 R1)

Version 1.0 from 1/30/23

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1 Preparation

1.1 Setup set download

The setup sets are located in HiDrive and can be downloaded using the following links:

PROXESS10 2022 R1 https://my.hidrive.com/share/bk2jc4qb32

Templates update https://my.hidrive.com/share/tdq8qi7qha

Note on setup set PROXESS 10 abas DMS Professional: There are additional template directories here.

The “Templates New Installation” directory contains both the new pmx file and empty databases. Various abas ID fields have been removed and some fields have been shortened, so please use these templates for new installations effective immediately.

There is also a directory called “Templates Update”, which contains a pmx file required for updating existing customers. This pmx file contains new document types and document fields. More detailed information on this can be found in Section 4.1, Archive supplementation.

1.2 Data backup

Close all active PROXESS modules on the server and carry out a full database backup.

Also back up the following directories containing customer specifications:

C:\Programdata\Akzentum\PROXESS Import Service

C:\Programdata\Akzentum\PROXESS Scan Link

If a VM is involved, a snapshot can be created of the entire machine.

If the snapshot must be reloaded, data loss is possible as a result of documents/files having been loaded in the interim.

2 Update

2.1 Prizm (optional)

Should the server be a Windows Server 2019, the version of the PROXESS WebBaseViewer should also be checked. If it is earlier than 13.20, it must be updated as well.

2.2 PROXESS component update

Install the setups in this order:

- PROXESS Professional
- PROXESS Web Base
- PROXESS Connectors
- PROXESS Scan Link
- PROXESS Desktop

2.2.1 PROXESS Professional

2.2.1.1 Installation

The following instructions on installing PROXESS Professional must be complied with if the "PROXESS Import Service" is run from an individual user account (i.e., not "Local System"), e.g., for being able to access specific network shares.

During setup, the "PROXESS Import Service" is installed anew. Following installation, it is run with the "Local System" account again. The first time the service starts up, the saved encrypted PROXESS login information (connections.xml) of the previous service user is lost.

In order to not have to enter all the passwords again, these files can be saved prior to the installation and restored again after setup of the service user for the "PROXESS Import Service" has been carried out again.

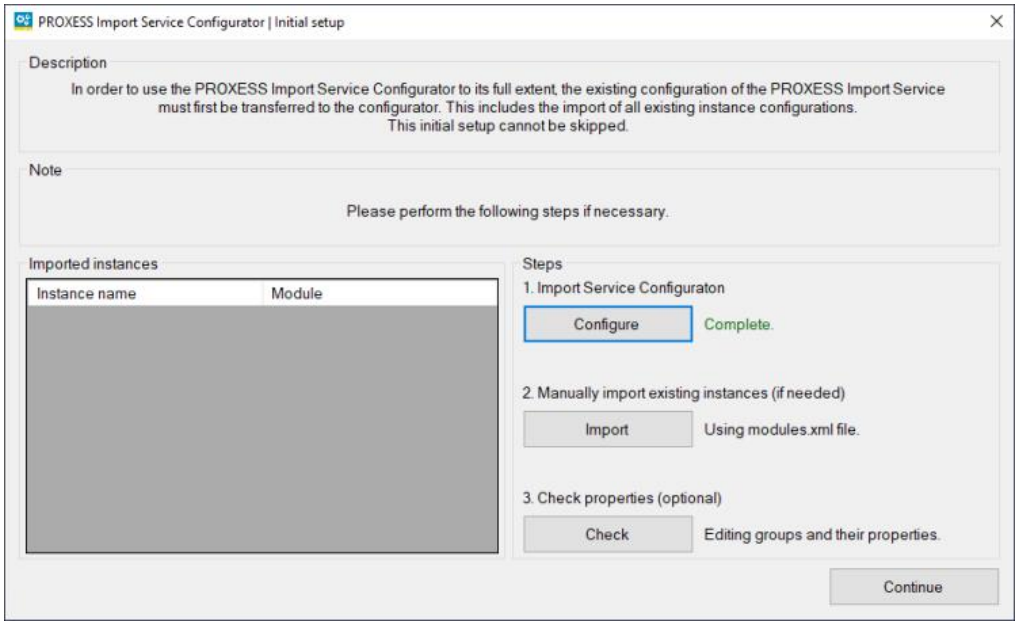
a. Back up all "connections.xml" files from the config directory (inc. subdirectories)
   (PROXESS 13.0 and above: C:\ProgramData\PROXESS\PROXESS Import Service)
   (Prior to PROXESS 13.0: C:\ProgramData\Akzentum\PROXESS Import Service)
b. Install PROXESS Professional setup
c. Close "PROXESS Import Service" (services.msc)
d. Enter the correct service user (services.msc)
e. Restore backed-up "connections.xml" files to the corresponding directories
   (PROXESS 13.0 and above: C:\ProgramData\PROXESS\PROXESS Import Service)
   (Prior to PROXESS 13.0: C:\ProgramData\Akzentum\PROXESS Import Service)

f. Start "PROXESS Import Service" (services.msc).
g. Check the import service log to ensure that all connection files could be read and that all importers can be started.
(PROXESS 13.0 and above: C:\ProgramData\PROXESS\PROXESS Import Service\logs)
(Prior to PROXESS 13.0: C:\ProgramData\Akzentum\PROXESS Import Service\logs)

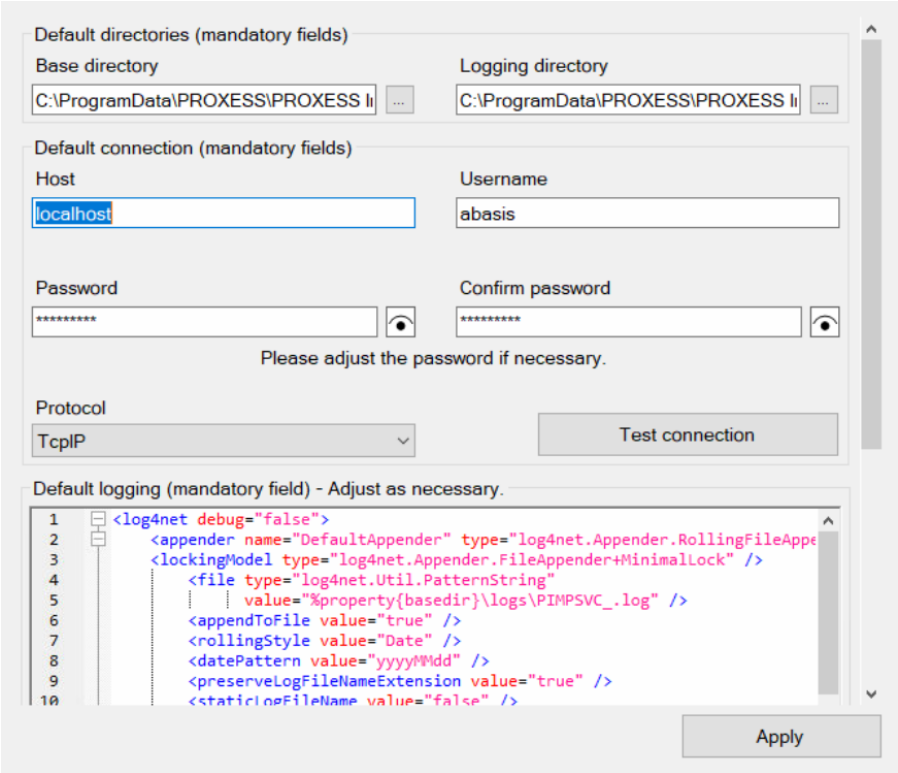
2.2.1.2 Configuration of the new import service configurator

The existing import service instances must be transferred to the new import service configurator.

The PROXESS Import Service Configurator application is started as the administrator for this purpose.



Configuration of the import service must be carried out first. This is done with the “Configure” button.



The default directories can be left as they are.

The connection data must be saved.

The configuration is transferred following a successful connection test.

The instances are then imported with the “Continue” button.

2.2.1.3 common.transfer.script

The common.transfer.script has been modified in various places so that empty documents are created in the transfer pool, for example.

Replacement of this script is required here.

Note: Any customizations carried out by the customer must be transferred!

2.2.1.4 common.rules.outbound.xml

The script common.rules.outbound.xml has beend modified in the update rules section.

Replacement of this script is required here.

Note: Any customizations carried out by the customer must be transferred!

2.2.1.5 BaseDataImporter modification

If the BaseDataImporter is to be used, a modification must be made in the following file:

C:\ProgramData\PROXESS\PROXESS Import Service\BaseDataImporter\config\common.properties.xml

The file contains the IniFileDirectory entry, which still points to the “old” Akzentum directory.

The new path of the import service must be entered here (for example):

```
<IniFileDirectory>C:\ProgramData\PROXESS\PROXESS Import Service\BaseDataImporter\config</IniFileDirectory>
```

Once the change has been saved, the PROXESS Import Service absolutely must be restarted.

2.2.2 PROXESS Web Base

Installation is carried out as usual.

If a certificate for Web Base was saved in IIS prior to the update, it must be saved again after the update.

2.2.3 PROXESS Connectors

With the PROXESS Connectors update, the Web Apps are available effective immediately.

The web app configuration can be found in Chapter 3, Web app configuration.

2.2.4 PROXESS Scan Link

Installation is carried out as usual.

2.2.5 PROXESS Desktop

Installation is carried out as usual.

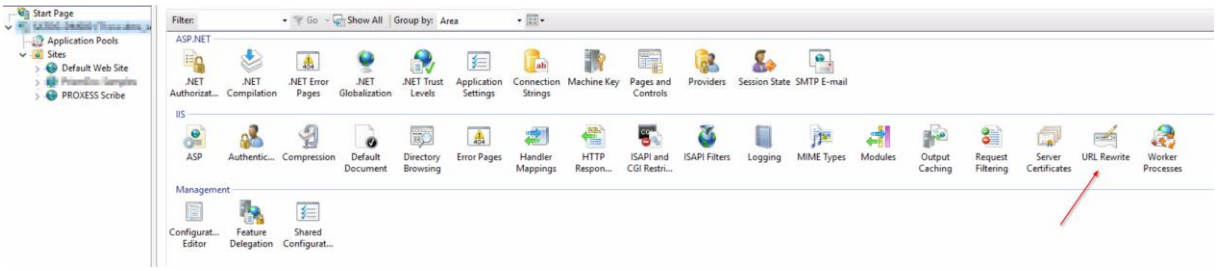
2.3 Functional check

When the update is complete, check for the proper functioning of PROXESS and the import service.

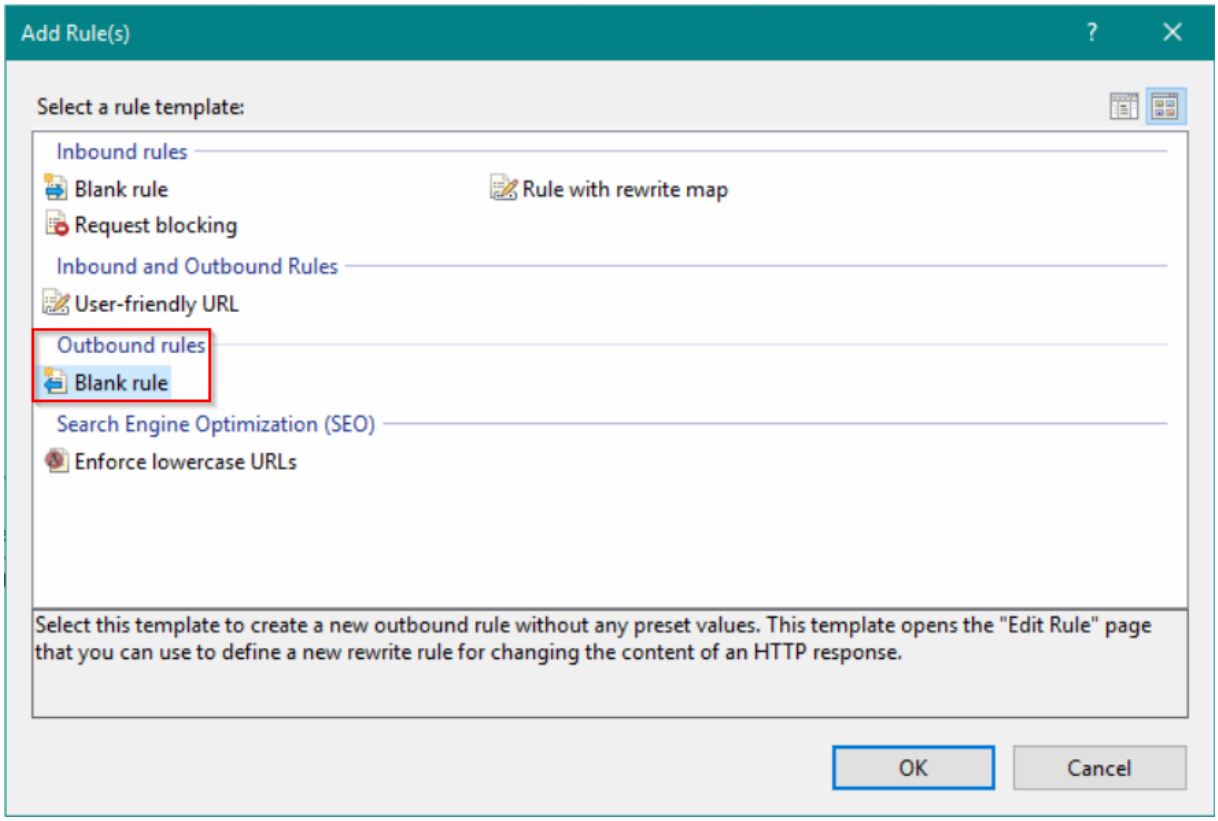
3 Web app configuration

3.1 Setting up multiple external URLs for PROXESS Web Base

In IIS, start the Rewrite module for the PROXESS Scribe website.



An outbound empty rule is added to this module.

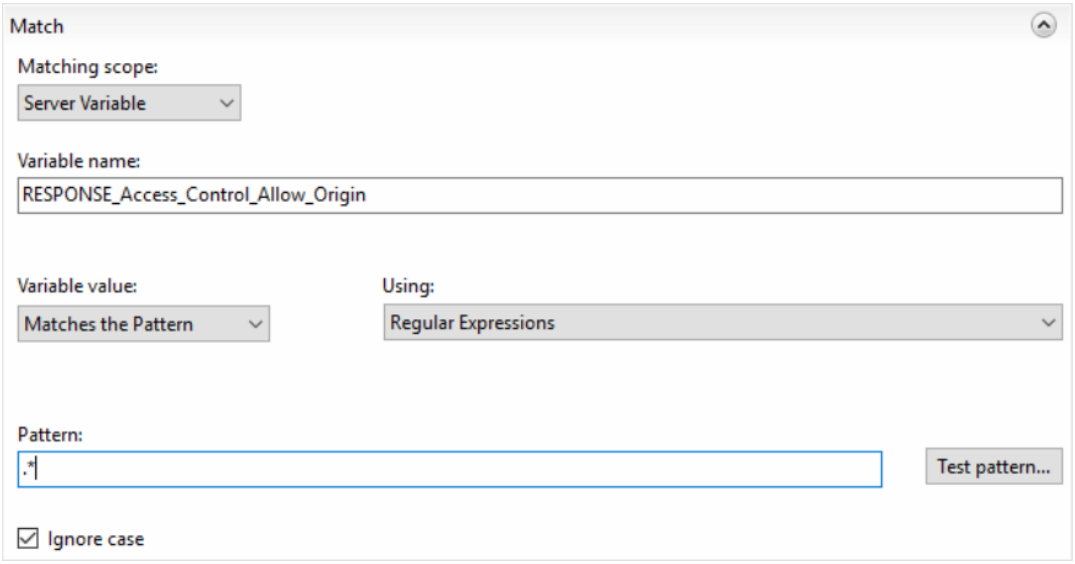


The following entries are now added to this rule:

Name: Add_CORS_Header

Preconditions: <None>

Match



Matching scope: Server Variable

Variable name: RESPONSE_Access_Control_Allow_Origin

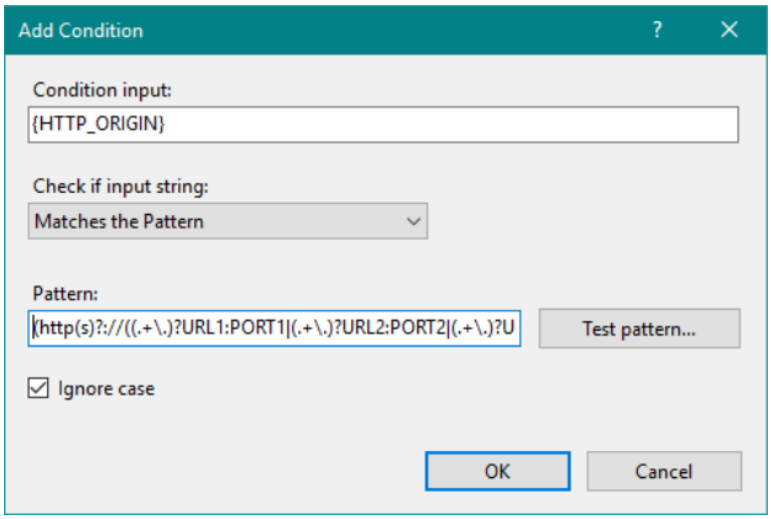
Variable value: Matches the Pattern

Using: Regular Expressions

Pattern: .*

Ignore case: Activate

Conditions



Add Condition

Condition input: {HTTP_ORIGIN}

Check if input string: Matches the Pattern

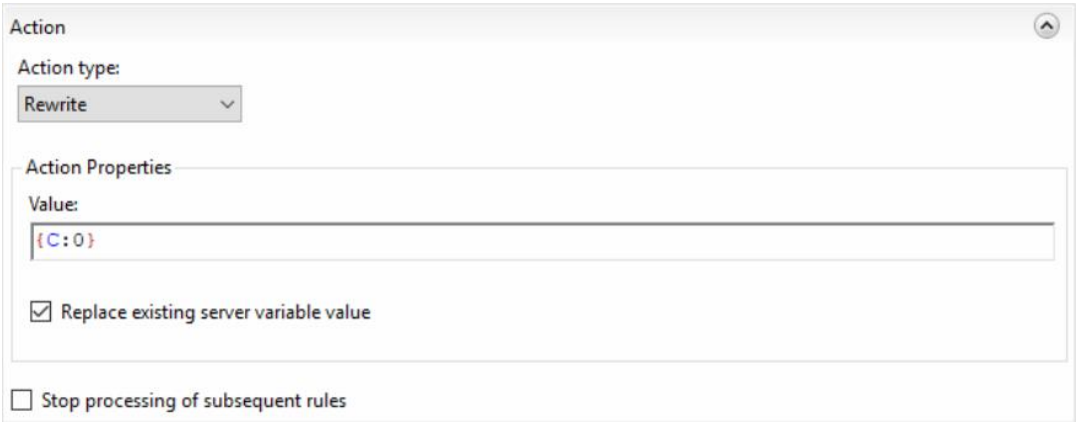
Pattern: (http(s)?://((.+\.)?URL1:PORT1|(.+\.)?URL2:PORT2|(.+\.)?URL3:PORT3))

Ignore case: Activate

NOTE: URLx:PORTx is replaced with a meaningful URL with the respective port

The entered pattern can be tested with a URL using the “Test pattern...” button.

Action



Action type: Rewrite

Action value: {C:0}

Replace existing server variable value: Activate

Stop processing of subsequent rules: Deactivate

The rule is then saved with the “Apply” button.

3.2 Port enable

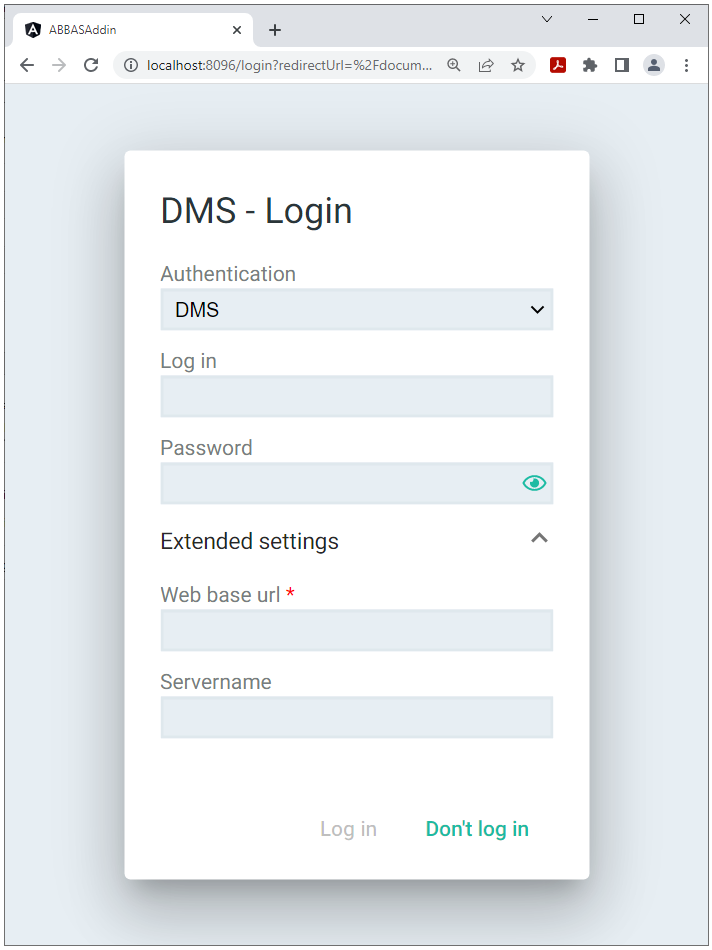
In the Windows firewall with enhanced security, an inbound rule and an outbound rule must be created for the port of the Web Apps.

a. Inbound rule:
   Rule type: Port
   Specific local ports: 8096
   Action: Allow connection
   Profile: Domain
   Name: PROXESS Web Apps port enable 8096 inbound
b. Outbound rule:
   Rule type: Port
   Specific local ports: 8096
   Action: Allow connection
   Profile: Domain
   Name: PROXESS Web Apps port enable 8096 outbound

3.3 Call-up test

Call-up of the Web Apps can be tested using the following URL:
http://localhost:8096/login?redirectUrl=%2Fdocument-list

If installation is successful, the login screen of the Web Apps appears:



Once everything is installed and configured and Web Apps can be called up, the reference to Web Apps must be created in abas.

Web Base: URLWeb Base:Port (e.g., http://PROXESS:8095)
Web Apps: URLWeb Apps:Port (e.g., http://PROXESS:8096)

You can find more information in the abas community: https://community.abas.de/t/proxess-web-apps-fur-abas-dms-gen-2-ab-30-01-2023-verfugbar-proxess-web-apps-for-abas-dms-gen-2-available-as-of-jan-30-2023/9388

4 abas modification

4.1 Archive supplementation

The following document types are created: service (415), sales web order confirmation (214), sales web order (212) and transfer pool (098) as well as the database fields Sales web order no. and Edit characters.

a. Open the **PROXESS Administrator Console**.
b. Log in as the **supervisor** user.
c. Carry out a metadata import with “abasDMS_Anpassung nach Update.pmx”.

4.2 Barcode

The barcode has been expanded from eight to 14 digits in abas ERP21.

In this regard, please check whether the Barcode and BarInkPZ fields are already 20 characters in length. Should the fields be 10 characters in length, please lengthen the fields.

Please lengthen the fields regardless of the abas version if applicable.

4.2.1 Field lengthening (optional)

MySQL:

```
Update `fields` set length = '20' where physfieldname in
('Barcode','BarInkPZ');

Alter Table docs
CHANGE COLUMN `Barcode` `Barcode` VARCHAR(20) CHARACTER SET 'utf8mb4' NULL
DEFAULT NULL,
CHANGE COLUMN `BarInkPZ` `BarInkPZ` VARCHAR(20) CHARACTER SET 'utf8mb4' NULL
DEFAULT NULL,
```

MSSQL:

```
Update dbo.fields set Length = '20' where PhysFieldName in ('Barcode',
'BarInkPZ');

Alter table dbo.docs alter column Barcode nvarchar(20);
Alter table dbo.docs alter column BarInkPZ nvarchar(20);
```

4.2.2 Barcode extension - (mandatory for abas ERP21)

Run the following SQL query in the database:

MySQL

```
SELECT Concat("1",LPAD(max(BarinkPZ), 13, "0"))+1
FROM abasdms.docs
where BarInkPZ between '25000000' and '49999999';
```

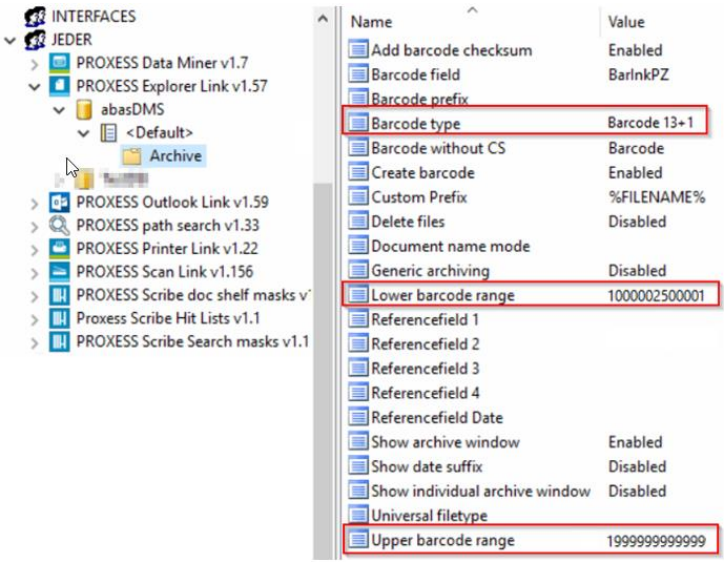
MSSQL

```
SELECT CAST((CONCAT(1,right(REPLICATE(0,13) + (MAX(BarInkPZ)),13))) as
bigint)+1
FROM abasdms.dbo.docs
where BarInkPZ between '25000000' and '49999999';
```

The determined value must then be added to the following modules in the barcode generation section:

- PROXESS Explorer Link
- PROXESS Outlook Link
- PROXESS Printer Link

Barcode type: Standard (13+1)
Lower barcode range: Result of the SQL query
Upper barcode range: 1999999999999

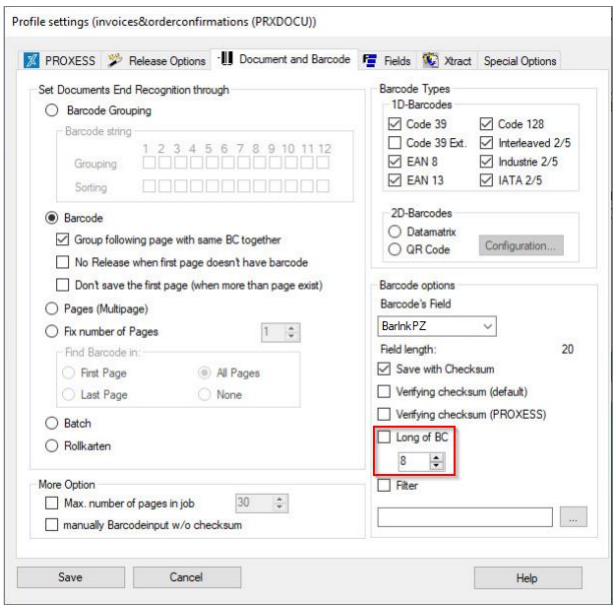


The following barcode number ranges are determined with abas:
00000050000001–09999999999999 abas (print)
10000000000000–19999999999999 PROXESS autom. barcode generation (mail etc.)
20000000000000–29999999999999 barcode labels

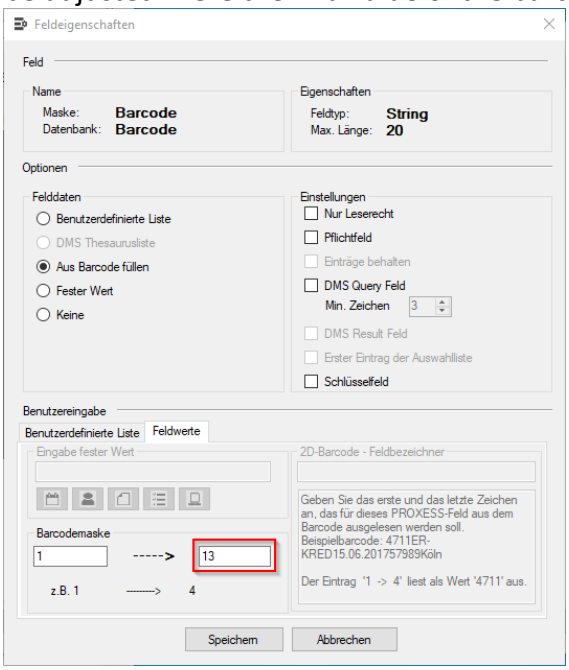
4.2.3 Customizing the barcode length in Scan Link (optional)

If the Scan Link is used, the following points must be checked in the profile (editing):

In the tab "Document and Barcode" the length of the barcode can be defined. If this option is used, this length must be adjusted.



Furthermore, in the "Fields" tab the field barcode is filled from the field BarInkPZ and must be adjusted. Here the 2nd value of the barcode mask must be adjusted.



After saving the profile, it must be transferred to the DMS Management Console via the menu "DMS Management Console" and distributed from there to the groups to be used.

4.2.4 Adjust barcode length in scan MFP (optional)

If the Scan MFP is used adjustments may have to be made.

To do this, open the HpHabMFP.exe program.

Edit the configuration.

If a pattern like e.g. \d{8}, this must be adapted to e.g. \d{14}.

Next click on the button configure barcode type.

Here you will need to check if a min. length is stored under Options, which has to be increased accordingly.

In the Import Service a change must be made for the MFP import. To do this switch to the Import Service directory and open the file common.transfer.MFP in the MFP configuration directory.

In line 15, the first characters for the barcode are taken from the BarInkPZ field.

At this point the following change must be made:

```
var barcode = Fields["BarInkPZ"].Substring(0,7);
```

replace with:

```
var barcode = Fields["BarInkPZ"].Substring(0,13);
```

5 Attachement

5.1 Product customizations

Some product customizations are planned which are in the process of being implemented at PROXESS.

These include the following topics:

- It currently automatically displays the next document in the transaction chain (next linked hit depth) if there is no file in the transaction to display.
  Fix planned: information will follow
- Display of the "Depth" column in the WebApps.
  Fix planned: by fall 2023
- Authentication Method Optimization.
  SSO in the WebApps currently requires clicking "Login" after program start. The username and password are already pre-populated.
  Fix planned: by fall 2023

If you have any questions please feel free to contact us at partner@proxess.de.