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## **Description**

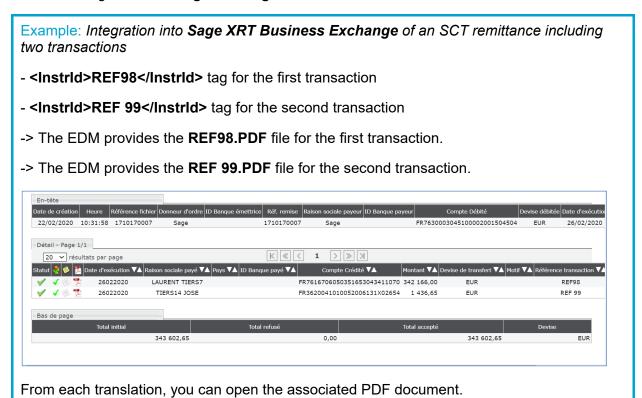
The present document describes the setup process for the link granting access, from transactions, to the of invoices or documents provided by a server of Electronic Document Management a.k.a. EDM.

### **Linking Signature Station to EDM**

The link between the transactions available in **Sage XRT Business Exchange** and the invoices (documents) available in the EDM is established through the **Transaction Reference** value:

- <Instrid> tag for SCT or SDD files
- Position 205 to 220 of record 04 for International Transfers files

The **Transaction Reference** is specified in the document or file names provided by the EDM for their integration into **Sage XRT Signature**.



# **Type of Documents**

- XML File: file containing 1 to n documents, with any extension recognized by your OS.
- PDF file: unique file for direct access to the document (if the link to Acrobat Reader has been defined on the station).

#### **Description**

#### **File Structure**

M: Mandatory - O: Optional

Level	Tag	Mult.	Туре	Status	Definition
	xml version="1.0"<br encoding="UTF-8"?>	[11]	Root	M	Message Root
->	<files></files>	[11]	Composed	M	
>	<file></file>	[1N]	Composed	M	
>	<name></name>	[11]	Max35Text	M	File Name
>	<url></url>	[11]	Max256Text	M	File access URL  E.g.:  [http://]/Share/DownloadImage?doc idxged  =[TransactionRefrence]&fledix=[FileReference internalToEDM]  &usridx=[EDMUserAccount]
>	<amount></amount>	[01]	DecimalNumber	R	File Amount (invoice)
>	<ccy></ccy>	[01]	Max3Text	R	Amount Currency
>	<docnb></docnb>	[01]	Max35Text	R	Document's Internal Ref. N°
>	<accnb></accnb>	[01]	Max35Text	R	Accounting Document No.
>	<date></date>	[01]	ISODate	R	Document Date (different from the date of the file integration into EDM)

Note: You can insert or delete optional tags from the XML file.

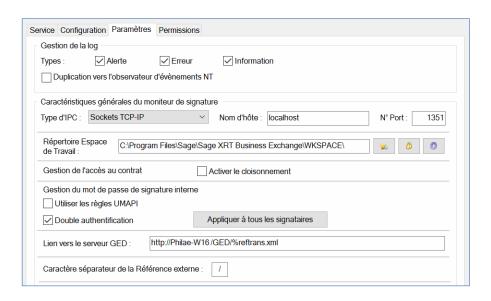
If you insert a tag, its name corresponds to the column name.

**Important!** The tags defined by the file structure are case-sensitive.

If the XML document includes public URLs, the share function is not supported (except for intranet deployments).

## **Setting up EDM Link**

The EDM link must be specified in the **Parameters** tab of the **System Administration** in the **Signature** service.



The **Link to EDM Server** is empty by default. If you leave it empty, no EDM link appears in **Sage XRT Business Exchange**.

When you specify the connection settings for the EDM server, a new column appears for the corresponding transactions in **Signature** module with the icon: ...

The EDM link must include the value **%reftrans.XXX**. It enables you to specify the use of the **Transaction Reference** during the query launch to associate the invoice or the document with the transaction in **Sage XRT Business Exchange**.

- If you want to open only one PDF document for each transaction, choose http(s):\\EDMServer\XXX\\%reftrans.PDF.
- If you want to open 1 to n documents for each transaction, choose http(s)://EDMServer/XXX/%reftrans.XML.

Note: You can specify the value of the Link to EDM server field as an HTTP path.

E.g.: http(s)://EDMServer/Invoices/%reftrans.XML

The extension is mandatory. Prefer the XML extension for all non-PDF files.

For connections to *iTESOFT* EDM servers, the expected format is: http://server\_name:port/Share/NewService?docidxged=%reftrans

## **Viewing EDM Links**

The links to the documents available on the EDM server can be viewed in the files details from the **Signature - Initialling** menu.

### **Example: %reftrans.PDF Links**

- A 2-transaction SCT file is integrated to Sage XRT Business Exchange with the REF98 and REF 99 references.
- The EDM server provides two PDF files, REF98.PDF and REF 99.PDF.
- The EDM link is set up this way: http:/EDMServer/XXX/%reftrans.PDF
- The corresponding files are displayed in the **Signature** module.



- Click on one of the transaction lines, a query is sent to the EDM server whose address has been defined.
- The document opens automatically in a new window or a new tab, according to your setup.

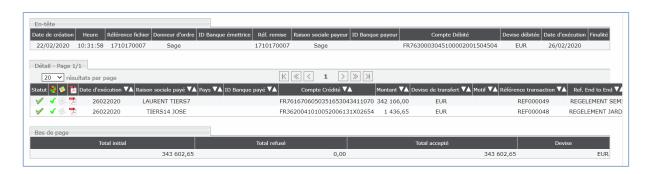
### **Example: % reftrans.XML Links**

When an EDM link points to an XML file, this file is regenerated by the **Signature** module before being displayed in a new window or tab.

- A 2-transaction SCT file is integrated to Sage XRT Business Exchange with the references REF000048 and REF000049.
- The EDM server provides two PDF files, **REF000048.XML** and **REF000049.XML**.
- The EDM link is set up this way: http://EDMServer/XXX/%reftrans.XML
- The resulting REF000049.XML file refers to three documents.

```
REF000049.XML ×
<?xml version="1.0" encoding="UTF-8"?>
<files>
        <file>
                <Name>URL DOCUMENT HTML</Name>
                <URL>http://Philae-W16-hava/GED/BONDINTERVENTION.htm</URL>
                <Amount>300000,00</Amount>
                <AjoutColonne>123</AjoutColonne>
                <Ccy>EUR</Ccy>
                <DocNb>REF-135678</DocNb>
                <AccNb>564023</AccNb>
                <Date>18/01/2020</Date>
        </file>
        <file>
                <Name>URL DOCUMENT DOC</Name>
                <URL>http://Philae-W16-hava/GED/BONDINTERVENTION.docx</URL>
                <Amount>40000,00</Amount>
                <AjoutColonne>456</AjoutColonne>
                <Ccy>EUR</Ccy>
                <DocNb>REF-135679</DocNb>
                <AccNb>564024</AccNb>
                <Date>18/01/2020</Date>
        </file>
        <file>
                <Name>URL DOCUMENT PDF</Name>
                <URL>http://Philae-W16-hava/GED/Fact1000.pdf</URL>
                <Amount>2166,00</Amount>
                <AjoutColonne>789</AjoutColonne>
                <Ccy>USD</Ccy>
                <DocNb>REF-135680</DocNb>
                <AccNb>564025</AccNb>
                <Date>18/01/2020</Date>
        </file>
</files>
```

The corresponding files are displayed in the Signature module.



• Click <sup>7</sup> on a transaction line to display the document.

