

# Oracle® WebCenter Forms Recognition

AP Project Migration Guide

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## WebCenter Forms Recognition

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## 1 Introduction

There are many challenges for the implementation and support teams when receiving a new AP Packaged Project template. Each release of the AP Packaged Project requires extensive effort on the implementation team to carry across all customizations from the implementation project to the new template. In the past, the update was very time consuming, involved the risk of losing data and was very challenging in implementation.

Changes include:

- Learnsets
- Customized Fields
- Verification Form
- Custom Classes
- Custom Script changes made to non-encrypted script
- INI file changes
- Field templates
- Security / credentials made

In order to overcome all these challenges, the WebCenter Forms Recognition features the Project Migration Tool. This tool provides better supportability and maintenance, allows for faster PS deployment, and provides an easy and comfortable way to carry out the migration.

The Project Migration Tool will minimize the overall customization effort by allowing the implementation, or support teams to carry 'core' changes from the template AP Packaged Project to the customized project on client site.

This new tool allows migration from project to project without losing data.

This document captures the requirements for this feature.

### Definitions

- Template Project – The project which acts as a template to update all other projects for the most current AP Packaged Project.
- Target Project – The project that will be overwritten with updates from the template project.

### Items of note

- All batches should be reprocessed after usage of the Migration Tool.
- PS to test to ensure their project performance is not impacted by the update.
- The INI file update will continue to be a manual process.

## 2 Migration Items

### 2.1 Custom Script

Description	Notes
<b>APPackaged class</b>	This script page is fully encrypted and the tool will be performing a full replacement.
<b>Generic class</b>	This script page is fully encrypted and the tool will be performing a full replacement.
<b>GlobalVariables class</b>	<p>At the bottom of the delivered script there will be a section for user customizations to be entered. Anything above user customizations section will be completely replaced from the template.</p> <p><i>Note: Any changes by PS in script on customization section will be retained during replacement.</i></p> <pre>'===== '===== GLOBAL VARIABLES CLASS CUSTOM EVENTS ===== '===== ' '===== '= CUSTOM EVENTS, VARIABLES AND FUNCTIONS SHOULD BE '= CREATED BELOW THIS POINT '=====</pre>
<b>Invoices class</b>	<p>At the bottom of the delivered script there is a section for user customizations to be entered (INVOICES CLASS CUSTOM EVENTS). Anything above user customizations section will be completely replaced from the template.</p> <p><i>Note: Any changes by PS in script on customization section will be retained during replacement.</i></p> <pre>'===== '=====INVOICES CLASS CUSTOM EVENTS ===== '===== ' '===== '= CUSTOM EVENTS AND FUNCTIONS SHOULD BE CREATED '= BELOW THIS POINT '=====</pre>
<b>UserExits class</b>	UserExits script will be updated with new UserExits events; existing ones will not be modified.
<b>All other script classes will not be updated.</b>	

### 2.2 Project Fields

Description	Notes
<b>New Fields added to Invoices / Generic Classes will be added.</b>	<p>New fields that exist on the template project will be copied over to the target project if they don't exist.</p> <p>Customized fields in target project will not be removed.</p>
<b>All field settings from target project will be overwritten from the template project. The exception is for the ASE fields which will remain untouched.</b>	<p>All field settings which exist in the Template project will be carried over to the target project.</p> <p>Table fields should be replaced from the template project.</p>

## 2.3 Project Settings

Description	Notes
<b>Analysis Templates</b>	All core templates will be overwritten, custom templates will remain untouched. All new templates will be carried across.
<b>Evaluation Templates</b>	All core templates will be overwritten, custom templates will remain untouched. All new templates will be carried across.
<b>Validation Templates</b>	All core templates will be overwritten, custom templates will remain untouched. All new templates will be carried across.
<b>OCR Engine / Customization</b>	No modification will occur.

## 2.4 Learnset Settings

Description	Notes
<b>Classification Engines</b>	Existing class engine settings will not be modified in the target project.
<b>Classification Learnset.</b>	No changes will be made to the classification Learnset.
<b>Extraction Learnset for the Generic / Invoices class</b>	The package project extraction Learnset for Invoices will remain encrypted. The extraction learnset from the Template will be copied to the target project.

### 3 Project Migration

Prior to starting the migration process, backup your learnsets and project data.

Steps:

- Go to [\Program Files\Oracle\WebCenter Forms Recognition\Components\Tools](#).
- Double click on **DstPrjMn.exe** to start the application.



Figure 3-1: Project Migration window

- Click on *Load* for *Source Project*, and then select the migration template .sdp file.
- Click on *Load* for *Target Project*, and then select the target project .sdp file.

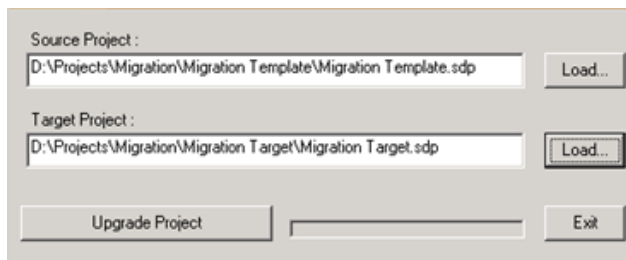


Figure 3-2: Entering Project Source and Target Location

- Click *Upgrade Project*.
- After the upgrade is done a confirmation message box will be displayed
- Click *Exit* in order to close the Project Migration Tool.

