

Oracle® Fusion Middleware

WebCenter Forms Recognition AP Project
Quick Start Guide

14c (14.1.1.0.0)

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Provides instructions to upgrade AP Project 2803
to 3520

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What is New in AP Project Release 3520 (3.5.2)

This document describes how to begin a fresh installation or update the existing AP Project including WebCenter Forms Recognition product.

Now all INI Configuration Migrated to Database

This version (3.5.2 or 3520) of the AP Project requires you set up the database schema. Now all of the INI configurations are stored in the database except the master database schema connection string. This allows the application to read the settings during runtime. Oracle recommends that you use a separate schema (Oracle) or database (SQL Server) with AP Project than the one stored for WebCenter Forms Recognition database schema.

Refer to the section *Configure the <project>.ini file of WebCenter Forms Recognition AP Project 3520 Installation and Configuration Guide*.

Solution Configuration Manager 2.0

You can use the WebCenter Forms Recognition Solution Configuration Manager (WFRSCMWeb) web application to

configure AP Project settings. You can also use SCM to migrate settings from one system to another system. SCM supports connecting to multiple AP Project databases. Like AP Project, SCM needs its own database schema to work with. Refer to *WebCenter Forms Recognition Solution Configuration Manager Guides* for information on installing and configuring SCM.

Refer to *Oracle WebCenter Forms Recognition AP Project 3520 Release Notes* for information on enhancements and fixed defects.

ALE Learnset Manager

The ALE Learnset Manager or ALM is a new web-based administration client that enables you to create, modify, and delete projects and classes which will be used by the Automated Learning Engine (ALE) to learn how to classify or extract data from documents. You can also edit classes by adding and removing training documents to improve the performance of each learnset.

Enforced Minimum Password Rules.

The minimum character length for a password is now 7. The password must include both alpha and numeric characters.

- If a user logs on to Designer, Verifier, or Project Merge Tool with a password that does not meet the minimum complexity rules, the user is provided with the **Change Password** dialog. After changing the password, the user is redirected to the login dialog.
- If a user logs on to Web Verifier with a password that does not meet the minimum complexity rules, the user is provided with the **Change Password** dialog when first accessing the database. After changing the password, the user will remain logged in.

The **Remember password** feature is no longer taken into account.

New Default Location for Log Directory

The default Log directory is now located in *C:\Program Files (x86)\Oracle\WebCenter Forms*

Recognition\Bin\bin\LogRoot\Log. Refer to the section *About Logging* of the *Oracle WebCenter Forms Recognition Installation Guide*.

Fresh Installation

If you are setting up the AP Project 3520 for the first time, please proceed in the following order:

1. Make sure the Oracle WebCenter Forms Recognition software is installed. Refer to the following documents for more information:
 - WebCenter Forms Recognition Installation Guide
 - WebCenter Forms Recognition Release Notes
 - WebCenter Forms Recognition Runtime Server User's Guide
2. Set up AP Project 3520. Refer to the following documents for information:
 - WebCenter Forms Recognition AP Project 3520 Installation and Configuration Guide
 - WebCenter Forms Recognition AP Project 3520 Solution Guide
 - WebCenter Forms Recognition AP Project 3520 Release Notes
3. Install Solution Configuration Manager. You need it to change different settings related to the AP Projects. Refer to the following documents for information:
 - WebCenter Forms Recognition Solution Configuration Manager Installation Guide
 - WebCenter Forms Recognition Solution Configuration Manager Release Notes
 - WebCenter Forms Recognition Solution Configuration Manager Technical Specifications
 - WebCenter Forms Recognition Solution Configuration Manager User Guide

Upgrade WebCenter Forms Recognition

This section provides a quick overview about upgrading older WebCenter Forms Recognition versions to version 14.1.1.0.0.

Upgrade from Version 12.2.1.4.0 or Later

Refer to Section *Upgrade to WebCenter Forms Recognition 14c (14.1.1.0.0)* of the *WebCenter Forms Recognition Migration Guide*.

Note: You must follow all the steps required before and after the upgrade.

Install Required Patch

It is recommended to install all the required patch.

Refer to the section *Install the Required Patch* of the *WebCenter Forms Recognition Installation Guide*.

Upgrade AP Project 2803 to 3520

Solution Migration Tool (SMT) is required to upgrade from AP Project 2803. Follow these guidelines:

Back Up the AP Project 2803

Before performing the AP Project migration, ensure that you have a complete backup of the project in its current state. The backup should include:

- The project (.sdp) file.
- The project configuration (.ini) file.
- All learnset files and folders (e.g. the *Train* folder and all its contents).
- The *VendorASSA* pool and any other ASE pool data that is used in the project (e.g. the *Pool* folder and all its contents).
- If the existing implementation uses the file system for batch storage, back up the batch root directory and all its contents.
- Perform back up of all WFR database schemas.

Upgrade AP Project 3520 Database Schema

This step requires the existing AP Project 2803 database schema to be updated to the AP Project 3520 compatible database schema. Follow these steps:

1. Open the following SQL script in the Oracle SQL Developer / SQL Server Studio respectively.
 - a. [Oracle database] <Installation Media>/Projects/AP Project 3520/DB Scripts/UniversalUpdate_AP_Project_Oracle.sql.
 - b. [SQL Server database] <Installation Media>/Projects/AP Project 3520/DB Scripts/UniversalUpdate_AP_Project_Sql_Server.sql.
2. Execute the above SQL script against the AP Project 2803 database schema.
3. Make sure the SQL script ran successfully.

Notes:

- Before loading the following SQL script in Oracle SQL Developer, change the Encoding to *UTF-8* in Tools -> Preferences menu.
- Remove the block symbol '□' at the beginning after loading the SQL script in Oracle SQL Developer.
- Ignore the following error during execution which happens because of some unknown character at line 1. The first line is a comment and is not supposed to be executed by Oracle SQL Developer.
Error starting at line : 1 in command -
..
Error report - Unknown Command

Fix AP Project 2803 INI file

Fix the following errors in AP Project 2803.ini file:

1. Locate the property *IMP_VL_Separator* and ensure it appears like *IMP_VL_Separator=_*
Note: The empty value is not supported during migration.
2. Locate the property *IMP_VL_SQLConnectionGroup* and ensure it appears like
IMP_VL_SQLConnectionGroup=03
Note: The empty value is not supported during migration and the connection group can be any

number. This setting can be changed after migration using the WFR SCM Webapp or using database table *BRWSQL*.

Upgrade using Solution Migration Tool

Perform the upgrade process using Solution Migration Tool. Refer to the next section *Fix AP Project 2803 Scripting Violations* if there are any custom scripting violations.

Refer to WebCenter Forms Recognition Solution Migration Tool User Guide and the following documents for more information:

- WebCenter Forms Recognition Solution Migration Tool Installation Guide
- WebCenter Forms Recognition Solution Migration Tool Release Notes

Note: You must follow all other steps required before and after the upgrade.

Note: INI settings related to WFR has been migrated to BRWCUS and BRWCUSTAB tables respectively.

Fix AP Project 2803 Script Violations

The AP Project script violations must be fixed before you start upgrading to the AP Project 3520 with Solution Migration Tool. Refer to *Section 5.1: Fix Project 1007G Script Violation of the WebCenter Forms Recognition AP Project 1007G Migration Guide* for more information.

Install Oracle Client Components Required for AP Project 3520

Refer to the section *Oracle Client Components of AP Project Installation and Configuration Guide*.

Register the ICAL DLLS

Refer to the section *Install the ICAL DLLs of AP Project Installation and Configuration Guide*.

Review the Upgraded AP Project 3520 directory structure

1. Rename the upgraded sdp and ini files. After upgrade the SDP and INI files still refers to the 2803 naming convention. To avoid confusion, it is recommended to rename these files.
 - a. Rename AP Packaged Project_2803.ini to AP Packaged Project_3520.ini
 - b. Rename AP Packaged Project_2803.sdp to AP Packaged Project_3520.sdp

Note: The file name except file extension should be same for SDP and INI file.

2. [Optional] Copy other folders or directories of the AP Project 3520 from the installation media.

Custom Scripts

Known sample scripts from Knowledge Base (KB) articles would not work as it is. There are also some cases where the custom scripts from the KB articles are not required as the functionality is working out of the box. Some of the following Knowledge Base (KB) articles which will not work with AP Project 3520 are mentioned below:

- Sample Script to Export Invoice Number Field with Ampersands (Doc ID 2810168.1). Refer to the same Knowledge Base articles for more information.
- Sample Script to Export Vendor Names with Ampersands (Doc ID 2948182.1). Refer to the same

Knowledge Base articles for more information.

- Non-English Characters (e.g. German Umlaut "ü") Correctly OCR'd and Displayed in WebCenter Forms Recognition Verifier are not Exported to XML Output (Doc ID 1484622.1)
- In the Case of Credit, Line Data is Not Exported as Negative in the WFR 2803 AP Project (Doc ID 2781898.1)

Review the Upgraded AP Project 3520 in Designer

Please make sure there are no errors in the AP Project after performing the following steps:

1. Click Settings menu and review various location settings and fix them.
2. Import the Vendor ASSA.
3. If there are custom scripts or scripting errors, compare the migrated AP Project script(s) with the AP Project 3520 script(s) provided with the installation media. Compare and review the scripts in a file comparison tool.
 - a. For convenience, the default AP Project 3520 script modules *GlobalFunctions* and *UserExits* is also located at *AP Project 3520/Scripts Modules/GlobalFunctions.txt* and *AP Project 3520/Scripts Modules/UserExits.txt* respectively.
 - b. If there are no customizations:
 - i. Yes, directly replace the *GlobalVariables* and *UserExits* script modules provided with the installation media to the upgraded AP Project 3520.
 - ii. No, compare, review and fix them accordingly. Alternatively you can also replace the default script modules and progressively add the customizations.
- Note:** Please ensure the scripts are copied in their respective scripting modules, otherwise the AP Project will get corrupted.
4. Perform re-learn of the Project
 - a. Switch to Train Mode.
 - b. On the Options menu, clear Incremental Learning.
 - c. To rebuild the learn set under the current version, on the Toolbar, click Learn documents  .
 - d. After the learning is complete, check the Incremental Learning.
 - e. Save the project and close the Designer Application.

Install ALE Learnset Manager (ALM)

You may set up ALE Learnset Manager Manager. Refer to the following documents for more information:

- ALE Learnset Manager Installation Guide
- ALE Learnset Manager Technical Specifications
- ALE Learnset Manager Release Notes
- ALE Learnset Manager Admin Guide
- Also refer to the section *ALM Integration* of the AP Project 3520 Solution Guide

Upgrade from Previous AP Project Versions

Oracle recommends upgrading any older version of AP Project to 2803 before moving on to AP Project 3520.

Refer to *WebCenter Forms Recognition AP Project 1007G Migration Guide* for information.