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Oracle WebCenter Forms Recognition Solution Configuration
Manager User Guide 1.3

12c (12.2.1.4.200714)

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Describes how to use Solution Configuration Manager

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1 About Oracle WebCenter Forms Recognition 12c (12.2.1.4.200714) Solution Configuration Manager

Oracle WebCenter Forms Recognition Solution Configuration Manager (WFRSCM) is a web-based application for the administrators of Forms Recognition. The application serves as a user interface between a Forms Recognition administrator and an AP project database. This application enables you to configure and manage the database for AP packaged solutions.

A zip file containing specific settings to the version of AP packaged solution you are configuring is available. Please refer to the section *Deploying a Project Package* of the *Solution Configuration Manager Installation Guide* for more information. To manage your database configuration from an Internet browser, rather than directly in the database, you need to import this ZIP file to the Solution Configuration Manager.

1.1 Migration Packet

The Solution Configuration Manager lets you configure and manage database settings and manage the database connection. When you've configured the settings, you export them as a migration packet. When you execute the migration packet in your database, the new configuration settings are applied to the Forms Recognition product you are using.

Note: The admin user must save each configuration change in a migration packet and export this packet before logging out. If the migration packet is not exported before the admin user logs out, any tables affected by the configuration changes will be locked and unavailable to any other user.

2 Log in to Solution Configuration Manager

To log in to Solution Configuration Manager, complete the following steps:

1. If you are using Windows authentication, you will enter your domain user name and password.
2. Open an Internet browser and enter your Solution Configuration Manager URL [*http://<host>:<port>/ WFRSCMWeb*].
3. In the **User Name** field, confirm or enter your user name and in the **Password** field, enter your password.
4. Click **Log in**.

3 Manage Database Connections

The following sections describe how to add, modify, and delete database connections.

3.1 Create a Connection

To create a database connection, complete the following steps:

1. In the navigation bar, click **Manage Project Configuration > Manage Database Connection**.
2. On the **Manage Database Connection Settings** page, in the empty connection row, complete the following sub steps:
 - a. In the **Connection Number** field, enter a unique connection number.
 - b. In the **Provider Type** list, select **System.Data.SqlClient** for a Microsoft SQL Server provider or **Oracle.DataAccess.Client** for Oracle provider.
 - c. In the **Server Name** field, enter the server name.

Note: For Oracle connections, the naming convention is <server name>/<Service name|SID>.

- d. In the **Database Name** field, enter the database name to which you want to connect.

Note: For Oracle connections, leave this field blank.

- e. In the **User Name** field, enter your user name.
 - f. In the **Password** field, enter your password.
 - g. Optional. To use Integrated Security with Microsoft SQL Server, select the check box instead of entering a **User Name** and **Password**. This setting is disabled if the **User Name** and **Password** fields are populated.
3. Click **Test Connection**.
 4. To save the connection settings, click **Insert**.

3.2 Edit a Connection

To edit the settings for a database connection, complete the following steps:

1. In the navigation bar, click **Manage Project Configuration > Manage Database Connections**.
2. On the **Manage Database Connection Settings** page, locate the connection you want to modify and click **Edit**.
3. Edit the connection settings and click **Update**.

3.3 Delete a Connection

To delete a database connection, complete the following steps:

1. In the navigation bar, click **Manage Project Configuration > Manage Database Connections**.
2. On the **Manage Database Connection Settings** page, locate the connection you want to delete and click **Delete**.
3. In the **Delete database records** confirmation dialog, click **Yes**.

4 Manage Packages

The following sections describe how to add a package, de-activate, and delete a package.

4.1 Add a Package

A package is a project settings ZIP file that contains an XML and an SQL file. The XML file defines the available settings for your configuration. The SQL file contains DML queries related to new language settings for the new package. To add a package, complete the following steps.

1. In the navigation bar, click **Manage Project Configuration > Manage Existing Package**.
2. In the **Add a new package** section, click **Choose File**, locate the project settings ZIP file, and click **OK**.
3. To activate the project, select the **Activate package** check box. It is selected by default.
4. Click **Add new package**.

4.2 Delete a Package

To delete a package, complete the following steps.

1. In the navigation bar, click **Manage project configuration > Manage existing package**.
2. Under **Existing packages**, select a package row and click **Delete**.
3. In the **Delete database records** dialog, click **Yes**.

4.3 Deactivate a Package

You can deactivate the packages that have been added to Configuration Manager. To deactivate a package, complete the following steps:

1. In the navigation bar, click **Manage Project Configuration > Manage Existing Package**.
2. From the **Existing Packages** section, select the package row and deselect the **Active** check box.
3. In the **Confirm deactivation** dialog, click **Yes**.

5 Manage Project Settings

This section describes how to configure the project settings.

5.1 View Project Settings

To view the SCM project and its corresponding settings, complete the following steps:

1. In the navigation bar, click **Configure Project**.
2. On the **Configure Project** page, select an SCM project, setting, and profile from the appropriate lists.

-
- **Note:** The Profile list does not display when you select the **Global Settings** or **Client Settings** from the **Settings** list.
 - You can create a new profile by copying an existing profile and you can filter the project settings.
-

5.2 Filter a Profile List

To filter the list of settings based on conditions, complete the following steps:

1. In the navigation bar, click **Configure Project**.
2. On the **Configure Project** page, complete the following substeps:
 - a. From the **Project** list, select a project.
 - b. From the **Settings** list, select a profile settings group.
 - c. Click **Filter**.
3. In the **Filter Criteria** dialog, double-click the column names and operators from the appropriate lists to create your condition.
The **Filter Conditions** field is populated with the value provided in the **Settings** field. Refer to the section *Filter Conditions* on how to create filter conditions in this document. Click **Apply**.
The filtered profile list is displayed.

5.3 Filter Conditions

You can create Filter Conditions by combining settings with filter criteria. The following table lists the filter conditions that can be created based on the values provided in the Settings field.

| Settings Value | Filter Condition |
|----------------|---|
| If, number | Then, =, >, <, >=, and <= can be used to create the filter condition. Example: [EXPProfileID] > 2. This will fetch results of all profiles where the export profile ID is greater than 2. |
| If, text | Then, =, >, <, >=, <=, and LIKE can be used to create the filter condition, for example, [ProfileName] LIKE 'FIL%'. This will fetch results of all profile names starting with the letters FIL. |

| | |
|-------------|---|
| | <p>Note: The text constant value should be written within single quotation marks. The test filter conditions are not case-sensitive. The wild card '%' can be used to mask one or more characters.</p> |
| If, Boolean | <p>Then, the value provided in the Settings field itself is the filter condition. You can also use the filter operator NOT to create the Filter Condition, for example, NOT [ExportToDB]. This will fetch results of all profiles that are not flagged for database export.</p> <p>Note: To create more complex filter conditions, you can combine multiple filter operators such as, AND, OR, NOT, etc.</p> |

5.4 Copy a Profile Setting

You can copy the settings of an existing profile to a new profile. To copy the profile settings, complete the following steps:

1. In the navigation bar, click **Configure Project**.
2. On the **Configure Project** page, select a project, setting, and profile from the appropriate lists.
3. Click **Copy Profile**.
4. In the **Copy profile** dialog, provide a **Profile ID**, **Profile Name**, and **Profile Description**.
5. Click **Save**.

5.5 Add Setting Data

You can add setting information for the AP packaged solution configuration databases. The available settings depend on the type and version of your configuration database that is in Solution Configuration Manager.

Specific information about the database settings is included in the AP Project documentation for different database options. To add setting data, complete the following steps:

1. In the navigation bar, click **Configure Project**.
2. On the **Configure Project** page, select a project, setting, and profile from the appropriate lists.

Note: The **Profile** list is not available for **Global** or **Client** settings.

3. Select a setting from the left pane.
4. In the empty setting row, enter or select the data that you want to add to the setting table and click **Insert**.
This is only valid if an indexed setting is maintained. Other settings are not displayed in a table.
5. In the **Select a packet** dialog, under **Select destination packet**, select one of the following options:
 - **Create new packet**

- **Select one existing packet**
- 6. Type a description for the packet.
- 7. Optional. Select **Use the same packet for entire session** to automatically use this packet for the current session.
- 8. Click **Save**.

5.6 Edit a Setting

You can edit settings for your AP packaged solution configuration database if the settings have been imported to the Solutions Configuration Manager. To edit a setting, complete the following steps:

1. In the navigation bar, click **Configure Project**.
2. On the **Configure Project** page, select a project, setting, and profile from the appropriate list.

Note: The **Profile** list is not available for **Global** or **Client** settings.

3. Select a setting from the left pane.
4. Modify the setting configuration and click **Save**.
5. In the **Select a packet** dialog, under **Select the destination packet**, select one of the following options:
 - **Create new packet**
 - **Select one existing packet**
6. Enter a description for the packet.
7. Optional. Select **Use the same packet for entire session** to automatically use this packet for the current session.
8. Click **Save**.

5.7 Delete Record Data

You can delete settings from your AP packaged solution configuration database if the settings have been imported to the Solutions Configuration Manager. The available settings depend on the type and version of your packaged solution configuration database. To delete a record from the project, complete the following steps:

1. In the navigation bar, click **Configure Project**.
2. In the **Configure Project** page, select a project, setting, and profile from the appropriate list.

Note: The **Profile** list is not available for **Global** or **Client** settings.

3. Select a setting from the left pane.
4. Select a setting configuration row that you want to remove and click **Delete**.
5. In the **Delete database records** dialog, verify that you want to remove the row and click **Yes**.
6. In the **Select a packet** dialog, select one of the following options:

- **Create new packet**
 - **Select one existing packet**
7. Enter a description for the packet.
 8. Optional. Select **Use the same packet for entire session** to automatically use this packet for the current session.
 9. Click **Save**.

5.8 Copy Configuration Settings

You can copy a setting configuration to create a new row in your AP packaged solution configuration database if you imported the configuration to the Solutions Configuration Manager. The available settings depend on the type and version of your packaged solution configuration database. To copy a setting configuration to a new row, complete the following steps:

1. In the navigation bar, click **Configure Project**.
2. On the **Configure Project** page, select a project, setting, and profile from the appropriate list.

Note: The **Profile** list is not available for **Global** or **Client** settings.

3. Select a setting from the left pane.
4. Select a setting configuration row that you want to copy to a new row.
5. Click **Copy Data**.
The system populates data in the new row.
6. Click **Insert**.
7. In the **Select a packet** confirmation box, complete one of the following options:
 - To create a new packet, select the **Create a new packet** option, enter a description for the packet, and click **Save**.
 - To select an existing packet, select the **Select from list of existing packets** option, enter a description for the packet, and click **Save**.

Note: To use the same packet for the entire session, select the **Use the same packet for entire session** check box.

8. Click **Save**.

5.9 Select a Migration Packet

The Solution Configuration Manager allows you to create or select an existing migration packet each time you edit database settings. You can then use the migration packets to migrate the changes in a target environment. To select a new or existing packet, complete the following steps:

1. In the **Select a packet** dialog, select one of the following options:
 - **Create new packet**
 - **Select existing packet**
2. Enter a description for the packet.

3. Click **Save**.

6 Manage Project Configurations

This section describes how to manage project configurations.

6.1 Create an SCM Project Configuration

To create an SCM project configuration, complete the following steps:

1. In the navigation bar, click **Manage Project Configuration**.
2. On the **Manage Project Configuration** page, in the empty project row, complete the following sub-steps:
 - a. Type a project name in the **Project Name** field.
 - b. From the **Package** list, select a package.
 - c. From the **Version** list, select the version number.
 - d. From the **Connection Group** list, select a connection number.
 - e. Optional. SCM Projects are active by default. To deactivate the project, clear the check box in the **Active** column.
3. Click **Insert**.

6.2 Edit an SCM Project Configuration

To edit an SCM project configuration, complete the following steps:

1. In the navigation bar, click **Manage Project Configuration**.
2. On the **Manage Project Configuration** page, select a project row, and edit the following settings:
 - **Project Name**
 - **Package**
 - **Version**
 - **Connection Group**
 - **Active status**
3. Click **Save**.

6.3 Delete an SCM Project Configuration

To delete an SCM project configuration, complete the following steps:

1. In the navigation bar, click **Manage Project Configuration**.
2. On the **Manage Project Configuration** page, select a project row and click **Delete**.
3. In the **Delete database records** confirmation dialog, click **Yes**.

6.4 Export Packaged Project Configuration Data

A package helps you to save your project configurations. Exporting packaged project configuration data before logging out of SCM enables other admin users to access and modify the elements that you had configured. Otherwise, the elements that you configured or created remain locked and unavailable to other admin users. To export packaged project configuration data, complete the following steps:

1. In the navigation bar, click **Export Project Configuration**.
2. On the **Export Project Configuration** page, under **Location**, the **Packet Migrate Location** box displays the location to which the packet is exported.
3. Under **Packet Selection**, complete the following actions:
 - a. From the **Package** list, select a package.
 - b. From the **Version** list, select a version.
 - c. From the **Project** list, select the project.
4. Select the row for the packet you want to export and click **Migrate Selected Packets**.
5. In the **Migration Status** confirmation dialog, click **OK**.

6.5 Import Packaged Project Configuration Data

You can import packaged project configuration data from an existing system. To import a project configuration, complete the following steps:

1. In the navigation bar, click **Import Project Configuration**.
2. On the **Import Project Configuration** page, the **Location** box specifies the location from which the project configuration is imported.
3. Under **Packet Selection**, perform the following actions:
 - a. From the **Package** list, select a package.
 - b. From the **Version** list, select a version.
 - c. From the **Project** list, select the project.
4. From the **Source Project** list, select the source project.
The system displays the packets associated with the project.
5. From the **Target Project** list, select the project to which you want to import the configuration.
6. Select the packet row and click **Import Selected Packets**.
7. In the **Import status** confirmation dialog, click **Yes**.