Oracle® Fusion Middleware

Oracle WebCenter Forms Recognition Solution Migration Tool User Guide

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Documentation for the WebCenter Forms Recognition's Solution Migration Tool User Guide that describes how to upgrade previous version of AP Project.



Oracle Fusion Middleware WebCenter Forms Recognition's Solution Migration Tool User Guide, 12c (12.2.1.4.0)

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1 What is Solution Migration Tool

The Solution Migration Tool allows upgrading AP packaged projects to the recent project version.

The upgrade takes care of all project related items like the INI file, the learn set, custom scripting, and customization of the project objects.

2 About This Manual

2.1 Intended Audience

This document addresses users who intend to maintain AP packaged solutions.

Working with Solution Migration Tool requires experience of Microsoft Windows operating system and of AP Project packaged solutions.

2.2 Content Overview

This document contains the following sections.

- The Project Migration section describes the prerequisites and process of a project migration.
- Basic Concepts and Techniques section informs about the user interface and the basic concepts for working with the Solution Migration Tool. This section also contains a functional description of the used controls.
- The Migration
- Best Practices section.

3 Project Migration

AP project is going to be migrated, if newer features for the packaged project are required.

The Solution Migration Tool helps migrate all the customizations of the project into the new version.

3.1.1 Prerequisites

- WebCenter Forms Recognition current version should be installed before using the Solution Migration Tool.
- Take a complete backup of the existing AP Project.
- If the existing implementation uses a database, backup the database.

3.2 Migrate Projects to Newer Version

The source project has to be available with it's learn set and INI file. The provided learn set must be mapped in the source project file. Additionally, a fresh downloaded project has to be accessible with the learn set and the INI file that represents the template of the migration target version.

If the migration target version requires a configuration database, create or upgrade the database structure before the usage of the Solution Migration tool. SQL scripts for creating or upgrading the target database are available with the download of the target version project.

The migration process consists of two steps to ensure a successful migration. In the first *Analysis* step, the tool looks for any violation in customization. Only supported project versions that have passed the *Analysis* step, can be migrated. If a project fails in the *Analysis* step, a detailed report is provided to assist in correcting the violations before another migration trial.

3.3 Supported Project Versions

The current version of the Solution Migration Tool supports only released versions of AP Project. The supported project versions are:

AP Project 1007CA, 1007D, and 1007G.

4 Basic Concepts and Techniques

4.1 Start the Solution Migration Tool

You must start the Solution Migration tool as an Administrator using the option *Run As Administrator* so that it can access the Windows registry to identify Oracle client.

4.2 The User Interface

The user interface reflects the easy-structured migration process. The start screen displays,

- The File, Options and Supported Builds menu items.
- The Define Source Project tab

There are two user interactions required for the migration of a project:

- Selecting and analyzing the source project.
- Selecting the migration template project and upgrading the project.

4.3 Configuring the Solution Migration Tool

The **Supported Builds** menu enables you to view the list of supported builds. The Solution Migration Tool is related to the loaded description packages. The build description packages are available for all the current releases of the packaged projects and are always up-to-date.

4.3.1 Import Build Description Packages

To import build description packages, complete the following steps:

1. In the main menu, select **Supported Builds** to view the build description packages. The description packages are not available by default.

Note: To configure the Solution Migration Tool, you need to download and import the description package that describes the solution version of the project that you want to migrate

In the Options menu, select Import package to import a downloaded description package.

Note: If you are not sure about the build of the project that you want to migrate, click Select Source Project. The Solution Migration Tool analyzes the project which results in a failed analysis. In the report grid you can view the reason for failure in red and the reason description includes the analyzed build of the source project

3. In the main menu, select **Supported Builds** to view the loaded description package after it is imported.

4.3.2 Language Selection

The Solution Migration Tool enables you to select the language for display menu items, labels, buttons, etc.

Select **Language** on the **Options** menu to change the language of the Solution Migration Tool. Changing the language does not affect the analysis and migration process, only the language of the user interface is changed.

Note: Currently English and German are the only languages that are supported by default.

4.4 Analysis

The analysis starts automatically after you select the source project. For Solution Migration Tool, source project signifies the project that is to be migrated. You must properly configure the project that you select and ensure the following.

The INI file of the selected project must be located in the same directory in which you stored the project file.

The project file has a folder reference for the learn set directory *Train*. This directory must exist and also contain a learn set. During project migration, the documents added by the customer are migrated to the learn set of the result project.

4.4.1 Select the Source Project

Click **Select Source Project** to browse through the file system.

When the **Load Source Project** dialog box displays the selected project file, the analysis starts automatically.

Note: Close the Source Project from the *Designer* and also close any other running applications before doing the migration.

4.4.2 The Analysis Process

During the analysis process all controls are disabled, except the **Exit application** button. You can view the name of the currently analyzed project file above the disabled **Select Source Project** button.

You can also view all the completed analysis steps in the **Task** column and the corresponding **Result** column. The current analysis step is displayed in the status bar at the bottom of the **Solution Migration Tool** window.

The following table lists the icons in the **Solution Migration Tool** window and their functions:

Icon	Description
O	This icon signifies a successfully completed step. You can click the icon next to the corresponding Result column to view more details. The successfully completed steps are highlighted in green font. The analysis process stops if any analysis step fails. The only exception is in case of a script analysis step. If a script analysis step fails, the analysis of the other scripts are still triggered and the processing stops only at the end of the script analysis step.
②	This icon in the Info column of the report grid signifies a failed step. You can click the icon next to the corresponding Result column to view more details. The failed steps are highlighted in red font. For scripting violation errors, click the red cross icon to view the Script Violation Report dialog box which provides detailed information about the violations. For more information, refer to the <i>Example – Analysis violation – Scripting violation section</i> .

4.4.2.1 The Analysis Result Viewer

At the end of the analysis process, you can view the status of your analysis in the **Analysis Result** dialog box. You can also view the post-analysis steps that you need to follow.

In case of a failed analysis, click **Open analysis log file** in the **Analysis Result** dialog box to view the analysis log files.

4.5 Upgrade

The upgrade process starts automatically after you select the template project. The template project refers to the project that defines the target version. The project that you select must be downloaded from a released version and contain an unchanged learn set and INI file.

4.5.1 Select the Template Project

To select the template project, complete the following step:

1. Click **Select Template** to browse through the file system. When the **File** dialog box returns with a selected project file, the upgrade process starts automatically.

Note: Close the Template Project from the *Designer* and also close any other running applications before doing the migration.

4.5.2 The Upgrade Process - Part 1

At the beginning of the upgrade process, Solution Migration Tool opens the template project to determine the target build.

After determining a valid upgrade build, Solution Migration Tool creates a copy of the template project in a sub directory of the source project. This project is called the target project for the migration process.

Note: The valid upgrade build must match the solution type for Invoices or Transcripts and the version build must be at a later date than the source project build.

After creation of the target project, it is determined if the migration is a cross version update.

Note: If the source project belongs to a series which is minor to the target project series, for example, the source project is 1007F and target project is 2.8, then the INI file parameter is transferred to the solution configuration database either partially or completely.

4.5.2.1 The Solution Configuration Database

The actual solutions come with a configuration database. You should create or upgrade the configuration database with the target version prior to using the Solution Migration Tool for migration.

4.5.2.2 Connection to the Configuration Database

If the upgrade process demonstrates that a cross update also requires a INI to database migration, the Configure database connection dialog box is displayed. You need to define the connection to an appropriate solution configuration database, that should be used with the project. An appropriate solution configuration database refers to a database that matches the solution type and version of the existing database.

If this information is not available, there are two options:

- **Abort.** In this case, the upgrade is stopped immediately. You can upgrade later when the credentials for the solution configuration database is available.
- **Skip.** This option continues the project migration with the exception of the INI values, which are not migrated. As in the Abort option, the migration needs to start once more with the database credentials available. You should use this option only to verify whether all other migration steps are processed as expected. (Fields, classes, verification forms, scripts, user management etc.)

The Solution Migration Tool supports the Microsoft SQL Server database and the Oracle Database.

You can select the required database in the **Configure database connection** dialog box. For the Configuration of an Oracle Database, an installed Oracle Client with ODP.NET 2.0 is required, otherwise the Oracle section remains disabled.

Note: The ODP.NET 2.0 components may require the download of ODAC components from the Oracle website. ODP.NET 2.0 is also a prerequisite for running the Invoices solution version 3.0 with the Oracle database. For example *ODP.NET_Managed_ODAC122cR1.zip*

After selecting the database, you need to define the connection string. Type the following information in the Host box.

- For SQL Server, type <server name>\<instance name>.
- For Oracle, type the service ID which has been configured in the client the thin the same or type an oracle data source description.

For the database credentials, you can click the **Integrated Security** option or provide a valid user ID and password.

For SQL server, define the database catalog name.

If you provide the correct credentials, the **Catalog Name** drop-down displays the names of all the available catalogs. If the credentials are incorrect, an error message will be displayed.

Finally, you need to check the database connection. The test is successful if the selected database connection contains an appropriate solution configuration database.

The Solution Migration tool also reads the client information from the database which is displayed on the next page.

The **Next** button remains disabled as long as the test is not successful.

4.5.2.3 Configure the INI transfer to Database Client Definitions

Solutions that support multi-tenant processing require a database configuration. For each client, the configuration settings enable assignment of profiles for different features.

If you click the **Overwrite existing Client** option, you can select any client from the client grid for overwriting. The **Client Information for Client ID** area displays the details of the selected client.

If you overwrite an existing client, all the assigned profiles are overwritten with the information from the INI file of the source project.

Note: All the existing global settings in the database are also overwritten with the INI information. If you overwrite an existing client, the profiles that are assigned to clients other than the selected clients are not overwritten. If the selected client has a shared profile, a warning icon appears beside the client profile.

The existing client 0 (zero) is overwritten by default.

You can also click **Insert new client** to create a new client. You can modify the client information.

You can also modify the client ID for the new client. However, you cannot use an existing client ID as a new client ID. The **Synchronize profile and partition IDs** with Client ID check box is selected by default. You can clear the check box if you want to set the profile ID and partition ID independent of the client ID. You can also assign the existing profiles and partitions to the new client.

Note: If you select an existing profile or partition, a warning icon or the corresponding details are displayed beside the appropriate profile or partition. The existing profiles or partitions that are assigned to the new client are not overwritten.

After modifying the relevant details, you can perform one of the following options:

- Click **OK** to continue with the upgrade process. The configured database information is used for the INI file transfer.
- Click **Abort** to cancel the upgrade process. The Solution Migration Tool reports a failed upgrade.
- Click Skip to continue with the upgrade process. The project is migrated without the INI file.
- Click Back to configure another database connection.

4.5.3 The Upgrade Process - Part 2

The upgrade process is interrupted by the **Configure database connection** dialog box if the Solution Migration Tool assesses a cross version update. If the database configuration is defined, the upgrade process continues. The upgrade process continues automatically only if there is no cross version update.

Similar to the analysis process, the upgrade process writes information into a reporting grid. The following table lists the icons in the **Configure database connection** dialog box and their functions:

Icon	Description
Ø	This icon signifies a successfully completed step. You can click the icon next to the corresponding Result column to view more details. The successfully completed steps are highlighted in green font.
<u> </u>	This icon signifies an upgrade step that is completed but requires some user action. You can click the icon next to the corresponding Result column to view more details.
8	This icon signifies a failed step. You can click the icon next to the corresponding Result column to view more details. The failed steps are highlighted in red font.

4.5.3.1 The Upgrade Result Viewer

At the end of the upgrade process, the **Migration Result** window displays one of the following results:

- Successfully Migrated
- Migrated with Warnings
- Failed

Note: The **Migration Result** window is not available if the upgrade process is aborted in the **Configure database connection** dialog box.

You can perform one of the following options:

Click Open log files to open the upgrade log file and the DB to INI log file in note pad.

Note: The upgrade log file displays reports about all the project migration steps. The INI log file displays reports about the transfer of the INI values into the configuration database.

Click Open target project location to open the directory of the target project.

The Solution Migration Tool window still remains open with relevant information displayed in the result grid.

4.6 Post Upgrade

Please do the following steps after successful project upgrade:

- 1. The upgraded project is created under the source project directory with the name such as *Upgraded_Build_2803*. If the upgraded project already exists, then a new directory is created with the name *Upgraded_Build_2803[2]* during migration, and so on. After successful upgrade, move/copy the upgraded project directory to the desired location.
- 2. Rename the directory from *Upgraded_Build_2803* to *AP 2803*.
- 3. Rename the INI and SDP files under AP 2803.
 - a. AP Packaged Project_1007G.ini to AP Packaged Project_2803.ini
 - b. AP Packaged Project 1007G.sdp to AP Packaged Project 2803.sdp

5 Best Practices

The Project Migration Tool reports a lot of information during the analysis and the upgrade steps. During each of the steps, the results are recorded in the results grid and log files are created.

- The Analysis log file provides information about the source project analysis. It is saved in the source project's directory with the file name LOG_Analysis_<date stamp>.log.
- The Project Upgrade log file provides information about the upgrade of the target project upgrade. It is saved in the target project's directory with the file name LOG_ProjectUpgrade_<date stamp>.log.
- The INI Upgrade log file provides information about the INI data transfer from the source project into the target project's INI and configuration database. It is saved in the target project's directory with the file name LOG_INIUpgrade_<date stamp>.log.
- Additionally, the source project INI lines, which are not processed during migration are saved in the unmappedINI.txt file, which is located in the target project's directory.

This information can be used for optimizing the migration process.

5.1 Example – Analysis violation – Scripting violation

Scripting violations are marked as failed in the analysis result grid.

Click the red cross icon to open the **Script Violation Report** dialog box that displays a summary of violations in the selected script page.

At the top, you can view the summary of violations. You can select one of the following options to view the script text:

- Click the Show complete Structures option to view the complete structure (Function, Sub, or Type) of the script lines containing violations. Each structure is separated by a grey row.
- Click the Show changes only option to view only the script lines containing violations.
 The erroneous lines are displayed in red.

You can view four columns in the Script Violation Report dialog box:

- The **Original** script column displays the original script text as it was released.
- The Customized script column displays the source project script next to the original script to enable easier comparison.
- The **Line#** column displays the line number in the source project script.
- The **Status** column displays the status of the corresponding script line.

You can find each script violation by looking for the line number in the script code.

You can also select a section of code from the grid and copy it to the clipboard. This feature enables you to search script lines in the project script.

Solution Correct the script based on the findings of the script violation report.

Note: You can correct the script starting from the bottom of the code and proceeding upwards so that the line numbers are in sync.

5.2 Example - INI file Migration - INI parameters not transferred

The *unmappedINI.txt* in the directory of the target project contains all the comment lines of the source INI file, because those lines are not transferred. You need to parse through this file for parameter definitions. If you find them, you must handle them separately.

5.3 Example - Error label parameters "ERR_VL_<index>=<error label text>

Any error label with an index value lower than 900 is not migrated. The Solution Migration Tool overwrites the values. These error labels are defaulted in the target version's INI file or configuration database.

Solution If a customized error label is erroneously indexed, then you need to modify the value of the indices to 900 and above and correct the scripting usage according to the modifications. You need to perform the migration once more to transfer the customized error labels.

5.4 Example - Upgrade warning - Migration Warnings

During migration, errors are marked as warnings in the migration result grid.

Click the warning icon to open the **Transfer Customer scripts** dialog box that displays a summary of warnings in the selected script page.

This viewer provides detailed information about the warning, such as the class to which the warning belongs, the function/sub name where the warning appears, steps to reproduce, and the original script line that is affected.

Click **Copy Warnings to Clipboard** to copy all warnings into an advanced text editor. This make the anylsis of the error easier.

Script migration warnings are also logged into the project upgrade log file:

```
[Warning] 08:34:49 Warning for class 'Invoices'
[Warning] 08:34:49 Warning for Method: 'DeliveryDate PostEvaluate'
[Warning] 08:34:49 Warning Type: has to be changed according to Invoices
documentation [fnGetCandidateContextNew]
                                                               'CC
[Warning]
                08:34:49 Affected
                                                  Line:
fnGetCandidateContextNew(oCandidate, pWorkdoc)'
[Warning] 08:34:49 Warning for class 'Invoices'
[Warning] 08:34:49 Warning for Method: 'BOLLOTaxFlag Validate'
[Warning] 08:34:49 Warning Type: has to be changed according to Invoices
documentation [fnFillAddressArray]
[Warning] 08:34:49 Affected Line:
                                                          'Address
fnFillAddressArray(pWorkdoc.Fields("VendorASSA"),
                                                             strVendorID,
pWorkdoc.DocClassName) '
[Info] 08:34:49 Script Invoices updated.
[Info] 08:34:49 Script Intercompany updated.
[Info] 08:34:49 Script Invoice_CN updated.
[Info] 08:34:49 Script Invoice_CN2 updated.
[Info] 08:34:49 Script Void made 1.
         08:34:49 Script Void updated.
[Info]
[Warning] 08:34:51 Warning for class 'UserExits'
[Warning] 08:34:51 Warning for Method: 'UserExitPostExtract'
          08:34:51 Warning Type: unavailable global function
[Warning]
[UpdateSettings]
[Warning] 08:34:51 Affected Line: 'Call UpdateSettings(pWorkdoc)'
         08:34:51 Script UserExits updated.
```

```
[Info] 08:34:51 Script GlobalFunctions updated.
:
:
```

Note: The project upgrade log file also provides information about all other migration steps.

The triggered warnings need to be handled after the Solution Migration Tool completes the upgrade process. You also need to close the SMT before you continue with the following procedure – the target project may be still locked by the SMT.

When you open the target project in Designer and switch to Definition mode, the scripting pages should start without any scripting errors. If a scripting error occurs, you have to resolve it first, before you can continue.

A script upgrade warning consists of 4 lines.

Example:

```
Warning for class 'Invoices'
Warning for Method: 'DeliveryDate_PostEvaluate'
Warning Type: has to be changed according to Invoices documentation
[fnGetCandidateContextNew]
Affected Line: 'CC = fnGetCandidateContextNew(oCandidate, pWorkdoc)'
```

It provides the following information that can be used to resolve the error:

- The first line consists of the class in which the warning has been triggered
- The second line consists of the method in which the warning has been triggered
- The third line consists of the problem object in square brackets and also a probable step for correction
- The fourth line consists of the code line that needs to be corrected

This information should enable you to locate the warning in the project script pages.

The warnings are also logged into the script page itself as comment lines.

```
:
' SMT [METHOD]: fnGetCandidateContextNew - has to be changed according to Invoices documentation
' Code: CC = fnGetCandidateContextNew(oCandidate, pWorkdoc)Affected Line: 'CC = fnGetCandidateContextNew(oCandidate, pWorkdoc)'
:
:
```

A correction inserted by the Solution Migration Tool always starts with a comment line "'SMT ..." followed by the the commented codeline that needs correction. However, all lines starting with "'SMT..." are not warnings.

The SMT always tries to repair the codeline itself. In such cases, the repaired code line is written below the commented original code line. If the original code line becomes obsolete, the repair only comments on the line.

If a commented code line cannot be repaired, but needs correction, a warning is triggered.

Hint: If the method, that is causing the warning returns a value, the declaration of the receiving variable might need to be changed.

Hint: If the commented code line is the beginning of a structure (If, For, While), there will be warnings that are dependent (Else, Else If, Exit For, Next, etc).

Example:

Start of a For loop:

```
Warning for class 'UserExits'
Warning for Method: 'CacheDocumentData'
Warning Type: unknown global start FOR (level 1) - please check [POLines]
Affected Line: 'For lngPO = 0 To UBound(POLines)'

End of the For loop:
Warning for class 'UserExits'
Warning for Method: 'CacheDocumentData'
Warning Type: unknown global NEXT (level 1) - please check [POLines]
Affected Line: 'Next'
```

Both the warnings are co-related and must be repaired together. In such cases the warnings provide additional information. They belong to the same class/method/problem object.

The hint line contains a "(level x)" information, which indicates that such structures can be nested within other structures.

After all warnings are corrected, the remaining "'SMT..." comments should be also analyzed and tested.

5.5 Example - Upgrade failure - DB Upgrade

In INI/DB Upgrade report:

```
Start Transaction: 'Upgrade'
______
[Info] 14:52:20 UPDATE BRWFLD SET REQUIREDINRTS=1, REQUIREDINVERIFIER=0
WHERE
                PROFILEID=0
                             AND
                                      CLASSNAME='INVOICES'
                                                             AND
FIELDNAME='BillToName'
[Info] 14:52:20 Affected rows: 1
[Info] 14:52:20 UPDATE BRWFLD SET REQUIREDINRTS=0, REQUIREDINVERIFIER=0,
ACTIVE=1
                WHERE PROFILEID=0 AND CLASSNAME='INVOICES' AND
                FIELDNAME='AmountSubtotal'
[Info] 14:52:20 Affected rows: 1
[Info]
               14:52:20 UPDATE BRWFLD SET REMOVEALLSPECIALS=1,
KEEPCERTAINSPECIALS='',
                REMOVESTARTEND=0, REMOVEBLANKS=1, REMOVELEADINGZEROS=0
                PROFILEID=0 AND
                                      CLASSNAME='INVOICES'
                                                             AND
FIELDNAME='InvoiceNumber'
[Info] 14:52:20 Affected rows: 1
                 14:52:20 UPDATE BRWFLD SET FUTUREDAYS='0',
[Info]
DATEONLYINCURRENTMONTH=0,
               NODAYSINPAST='1000' WHERE PROFILEID=0
CLASSNAME='INVOICES' AND
                FIELDNAME='InvoiceDate'
[Info] 14:52:20 Affected rows: 1
```

All SQL commands are logged into the report.

If a SQL command fails during transaction, the transaction is cancelled and rolled back. The last listed SQL command in the report is the one that caused the failure. The report shows the reason for failing at the end of the transaction report.

Solution You need to investigate the reason for failure related to the source INI file. In the example above, the transaction fails while inserting values into the column *IGNORECHARACTERS* in the table *BRWPONFORMATS*. This happens because the value " (inverted commas) is interpreted by Oracle as a *NULL* value, which cannot be inserted here, as the corresponding column is not defined as *NULL*. This is a common issue regarding the handling of empty strings as null value when you use the Oracle database.

Solution A special Update script is provided that attempts to repair this known issue by modifying the constraints of those columns that are allowed to receive empty strings with NULL values.

You can run this SQL script on your Oracle database or correct the constraint for the named column from *NOT NULL* to *NULL*.

6 Known Problems and Solutions

6.1 Additional inserted INI file parameters in DB upgrade

New source INI file parameters added to a new INI section always will be migrated to the target INI file (such as, *CUS_VL_NewOption*).

New source INI file parameters added to an existing section only will be migrated, if the parameter is an indexed parameter. *Indexed* means either an index number is a part of the parameter name or the parameter is indexed by a field name.

A new parameter:

- *ERR_VL_901* will be inserted into the *BRWERR* table as a new record.
- EXP_VL_DBHCNewExportHeaderField will be inserted into the BRWEXPHeader table as a new record.
- EXP_VL_NewExportOption will not be written into the BRWEXP table.

The problem is that a customized parameter like *EXP_VL_NewExportOption* will disappear.

The solution is to copy such parameters manually from the source to the target INI file after the migration.

6.2 Solution Migration Tool does not start on Windows 2012 Server

The Solution Migration tool is crashing during start on Windows 2012 Server. This is related to the rights management.

To solve the issue, start the Solution Migration tool in **Run As Administrator** mode.

6.3 System Error when DB Configuration Dialog is shown

The Solution Migration tool displays the following exception message when the database configuration dialog appears: System. Security. Security Exception: Requested Registry Access Is Not Allowed.

The Solution Migration tool attempts to access the registry to determine an installed Oracle client. Without the necessary rights, this registry read access displays the exception message.

To resolve the issue, start the Solution Migration tool in the **Run As Administrator** mode.

6.4 Event Duplicates in Migrated Project

Events inserted as customization in the source project can be part of the protected script in the target version. In that case, both the customized even and the protected event exists in the target project.

These possible duplicates are not detected during analysis because the target version is not part of the analysis.

Such duplicates will cause an error when the script is triggered. After the migration, the scripts have to be tested in any case. If a duplicate is found, the customized event should be deleted and the content has to be passed into an appropriate *UserExit*.

6.5 Classification Threshold and Distance values do not get Updated

When migrating a project, the Threshold and Distance values for Standard Classification and Parent Classification are not getting updated automatically in the migrated project file.

Post migration, check the values in the **Definition Mode Project** tab and update them manually, if required.

6.6 Solution Migration Tool Crashed During Migration

The Solution Migration tool is crashing during migration process.

To solve the issue, temporary disable the Antivirus application on the system.