Perceptive Accounts Payable Invoice eForm

Installation and Setup Guide

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What is Accounts Payable (AP) Invoice eForm?

The Perceptive Accounts Payable (AP) Invoice eForm solution provides a flexible, ready-to-use form for processing and approving invoices for payment. This guide explains how to install the eForm on Perceptive Content. After completing the installation, you must configure the eForm to work in your environment.

AP Invoice eForm integrates efficiently with Enterprise Resource Planning (ERP) applications such as Lawson, PeopleSoft, SAP, and Oracle EBS. However, you can use the eForm for virtually any business application that is used to process invoices for payments.

This guide explains how to install AP Invoice eForm on Perceptive Content. After completing the installation, you configure the eForm for your invoice processing needs. For more information on eForm configuration, refer to *Perceptive AP Invoice eForm Advanced Design and Setup Guide* and the *Perceptive AP Invoice eForm Connector Configuration Guide*. These documents provide help with the following topics.

- Virtual tables
- Custom logic
- Validation
- Value added tax (VAT)
- Goods receipts
- Add on costs (AOC)
- Globalization

These and other AP Invoice eForm and Perceptive Content guides are available in the Perceptive Software Customer Portal, on the Product Documentation tab, on the AP Invoice eForm page.

Installation requirements

Before you install AP Invoice eForm, you must install and have access to each of the following programs on the target network.

Software

- ImageNow Server and Client version 6.5.1.149 to 6.7.x or Perceptive Content 7.0.0 to 7.2.2.

  Notes

  - For an active-active server environment, use ImageNow version 6.7.0.2717 or higher.
  - If you are running previous versions of ImageNow, please contact Product Management for more information on installing the AP Invoice eForm.
  - Perceptive Content on mobile devices does not support AP Invoice eForm.
- Internet Explorer, version 8 or higher

  Note For more information on browser compatibility, refer to the “eForm viewing requirements” section under Perceptive Content eForms in the *Perceptive Content Technical Specifications 7.0.x* document.

Licenses

AP Invoice eForm requires the following Perceptive Content licenses.

- Uploaded Forms or Worksheets license
- Uploaded iScript license

For assistance with licenses, contact your Perceptive Software representative.

Active-active server environments

AP Invoice eForm supports Perceptive Content instances installed in active-active server environments. An active-active server environment has at least two active instances running at the same time: a primary instance and a secondary instance. However, each instance of the Perceptive Content Server runs independently of the other. You only install AP Invoice eForm on the primary server instance.

For information about active-active environments, refer to the *Perceptive Content Active-Active High Availability Technical Guide* and the *Perceptive Content Server and Client Installation and Setup Guide* for your Perceptive Content environment. Both guides are available in the Perceptive Software Customer Portal, on the Product Documentation tab, on the AP Invoice eForm page.

Download the files

To download the AP Invoice eForm files, complete the following steps.

1. Log in to the customer portal.
2. In the **Product Downloads** page, search for the **Perceptive AP Invoice eForm** file specific to your ERP and operating system.
3. Complete one of the following steps.
    - In a Windows environment, download the ZIP file to a temporary directory on your computer.
    - In a Unix or Linux environment, download the TAR file to the Perceptive Content Server root directory, such as /opt/inserver/.

Install Accounts Payable Invoice eForm on Windows

To install the AP Invoice eForm for the first time, complete one of the following processes for your Windows or Unix server environment. To upgrade, refer to the *Perceptive AP Invoice eForm Update Guide*.

Install AP Invoice eForm in a Windows environment

To install AP Invoice eForm in for the first time, use the ZIP file you previously downloaded from the Customer Portal. In an active-active server environment, install the AP Invoice eForm on the primary server node by completing the following steps.

1. Navigate to the **AP Invoice eForm ZIP file**.
2. Extract the **AP Invoice eForm <*version*>\temp** folder contents to the Perceptive Content Server root directory, such as **C:\inserver**.

    Note If prompted to merge or overwrite files, click **Yes**.

3. Optional. If you connect AP Invoice eForm with your ERP application, such as SAP or Microsoft DAX, complete the following steps.
    1. Navigate to **[*drive*:]\<*INServer*>\temp\apef_install\etc**.
    2. Open the **AP_Config.xml** file.
    3. Populate the **wsdlUrl** property under the `<envoy>` element.
4. In **[*drive*:]\<*INServer*>\temp\apef_install**, run the **apef_install.bat** file.
5. When the installer prompts you to specify the destination department, type the appropriate Perceptive Content department.

    Note The department name you provide must exist in Perceptive Content.
6. Optional. To review the installer log file, navigate to **[*drive*:]\<*INServer*>\log** and open **AP_Invoice_eForm_Installer_<*date*>.log**.

    Note

    - The eForm installation process sets up the necessary custom properties, document types, virtual tables, and the eForm. To complete the AP Invoice eForm installation, continue to Create an application plan.
    - The AP Invoice eForm installs and configures the Demo Connector by default. To make it operational with virtual tables, or other data sources for lookups and drop-down lists in your environment, you must remove `DemoConnector` from the `<connector>` settings in THE **AP_Config.x**ml file and add the required configuration. For additional information, refer to the “Associate AP Invoice eForm with virtual tables or other ERP application” section in the *Perceptive AP Invoice eForm Advanced Design and Setup Guide*.

Install AP Invoice eForm in a Unix environment

To install AP Invoice eForm for the first time, use the TAR file you previously downloaded from the Customer Portal. In an active-active server environment, install the AP Invoice eForm on the primary server node by completing the following steps.

1. Navigate to the Perceptive Content Server root directory, such as ***/opt/inserver***.
2. To unzip the file you previously downloaded, type the following command, replacing <*filename*> with the name of your AP Invoice eForm file.

```
gunzip -d <filename>.tar.gz
```

3. To extract all of the packaged files, type the following command.

```
tar -xvf <filename>.tar
```

4. To set the environment variables, navigate to ***/<INServer>/bin*** and type the following command.

```
. ./setenv.sh
```

5. Optional. If you connect AP Invoice eForm with your ERP application, such as SAP or Microsoft DAX, complete the following steps.
    1. Navigate to **[*drive*:]\<*INServer*>\temp\apef_install\etc**.
    2. Open the **AP_Config.xml** file.
    3. Populate the **wsdlUrl** property under the `<envoy>` element.

6. To execute the AP Invoice eForm installer, navigate to ***/<INServer>/*temp/apef_install** and type the following command.

```
. ./apef_install.sh
```

7. Optional. To review the installer log file, navigate to ***/<INServer>/*log** and open **AP_Invoice_eForm_Installer_*<date>*.log**.
8. Optional. To preserve disk space, remove the TAR distribution file from the Perceptive Content Server root directory.

   Note

   - The eForm installation process sets up the necessary custom properties, document types, virtual tables, and the eForm. To complete the AP Invoice eForm installation, continue to Create an application plan.
   - The AP Invoice eForm installs and configures the Demo Connector by default. To make it operational with virtual tables, or other data sources for lookups and drop-down lists in your environment, you must remove `DemoConnector` from the `<connector>` settings in THE **AP_Config.xml** file and add the required configuration. For additional information, refer to the "Associate AP Invoice eForm with virtual tables or other ERP application" section in the *Perceptive AP Invoice eForm Advanced Design and Setup Guide*.

Create an application plan

To use AP Invoice eForm with ImageNow 6.7.x or higher, you must create an application plan to load data into the virtual tables. To continue installing AP Invoice eForm on an ImageNow version prior to 6.7.x, proceed to the Assign privileges and create a view section of this document.

To create an external-type application plan for use with Perceptive Content interfaces, such as iScript or Message Agent, complete the following procedures in order.

- Create the application plan
- Add the dictionary values
- Create the folder levels

Important You must type all names provided in the following steps exactly as listed. The application plan is case-sensitive.

Create the application plan

To create an application plan for AP Invoice eForm in Perceptive Content, complete the following steps.

1. In **Management Console**, in the left pane, under Select Department, select the appropriate department from the drop-down.
2. Expand the **Application Plans** tree, and click **External**.
3. In the right pane, on the **Applications** tab, click **New**.
4. In the **Plan Settings** dialog box, click the **General** tab.
5. Under **Information**, complete the following substeps.
   1. In the **Name** box, type **Z_APW_VirtualTables_AppPlan**.
   2. In the **Description** box, type a description for your application plan.

    3. Select the **Is active** check box.
    4. Click **OK**.
6. Continue to Add the dictionary values.

Add the dictionary values

To add the required dictionary values to the Z_APW_VirtualTables_AppPlan application plan, complete the following steps.

1. In the **Application Plan Designer**, in the **Dictionary** pane, click the **New Field** button.
2. In the **Dictionary Field** dialog box, in the **Name** box, type **FOLDER_NAME** and click **OK**.
3. Repeat the previous steps to create the dictionary value **FOLDER_TYPE**.
4. Continue to Create the folder levels.

Create the folder levels

To create the required folder levels in the Z_APW_VirtualTables_AppPlan application plan, complete the following steps.

1. In the right pane, on the **Map** tab, in the **Document – Default** section, click the **Remove Level** button. On the **Convert Map** confirmation window, click **Yes**.
2. In the **Drawer** pane, double-click on **Drawer**. In the **Drawer Attributes** dialog box, complete the following substeps.
    1. In the **Drawer** list, click **Z_APW_VirtualTables**.
    2. Click **OK**.
3. To add two folder levels, click **Add folder level** twice.
4. In the first **Folder – Default** pane, double-click on **Folder Name**. In the **Folder Name Attributes** dialog box, complete the following substeps.
    1. In the **Source** list, click **Dictionary**.
    2. In the **Value** list, click **FOLDER_TYPE**.
    3. Click **OK**.
5. In the first **Folder – Default** pane, double-click on **Folder Type**. In the **Folder Type Attributes** dialog box, complete the following substeps.
    1. In the **Source** list, click **Folder Type**.
    2. In the **Value** list, click **Z_APW_VirtualTable**.
6. In the second **Folder – Default** pane, double-click on **Folder Name**. In the **Folder Name Attributes** dialog box, complete the following substeps.
    1. In the **Source** list, click **Dictionary**.
    2. In the **Value** list, click **FOLDER_NAME**.
    3. Click **OK**.
7. In the second **Folder – Default** pane, double-click on **Folder Type**. In the **Folder Type Attributes** dialog box, complete the following substeps.

    1. In the **Source** list, click **Dictionary**.
    2. In the **Value** list, click **FOLDER_TYPE**.
8. Save and close the application plan.

Assign privileges and create a view

To assign the Perceptive Content privileges and create the view required for your users to access and use AP Invoice eForm, complete the following tasks.

Create a custom view and assign privileges

For your users to access AP Invoice eForm, create a view that includes the Project or Folder ID.

In ImageNow versions 6.5.1 to 6.6.x, you create a view at the Project level. In ImageNow version 6.7.x and higher, you create a view at the Folder level.

To create the custom view definition, complete the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the **Project** or **Folder** tab, click **New**.
3. In the **New View** dialog box, in the **Name** box, type the name of the `<viewname>` configured in **AP_Config.xml**. The default is **Z_APW All Folders**. In the **Description** box, type the description of the view that will appear in the **ToolTip** for the view. Click **OK**.
4. Click the new view > **Modify**.
5. In the **View Designer** window, in the **Preview** pane, click the **Columns** button.
6. In the **Columns** dialog box, select the check box for **Project ID** or **Folder ID** and click **OK**.
7. In the **Preview** pane, right-click **Project ID** or **Folder ID** > **Sort Ascending**.
8. Click the **Properties** button and in the **View Properties** dialog box, complete the following substeps.
    1. On the **Security** tab, under **Users and Groups**, add or select the group.
    2. In the **Privileges** list, click the column in front of **Access by URL** to display the **Grant Privilege**  icon.
    3. Click **OK**.
9. Save and close **View Designer**. In the **View Designer** confirmation box, click **Yes** to activate the view.

Grant virtual table, drawer, and eForm user privileges

To allow your users the necessary access to the AP Invoice eForm virtual tables, the virtual tables, drawer, and the eForm itself, assign the following privileges.

- To grant access to the virtual tables, apply the Use privilege for each virtual table project or folder.
- In ImageNow 6.7 or higher, to grant access to the Z_APW_VirtualTables drawer, apply the Search privilege.
- To grant access to the eForm, apply the Create, Delete, Modify and View privileges.

To assign these privileges to a user or a group of users, complete the following steps.

1. In **Management Console**, in the left pane, click **Groups** or **Users**.
2. Optional. To search for a group or user, in the right pane, on the **Security** tab, in the **Search for groups** box, type some or all of a group or user name, and then click **Search**.
3. In the **Select a group** or **user** list, click the appropriate group or user > **Modify**.

4. To grant access to the virtual tables, complete the following substeps.
    1. In the **Security Settings** dialog box, in the left pane, click **Project Privileges** or **Folder Type Privileges**.
    2. In the **Project Type** or **Folder Type** list, click the type to which you want to apply privileges. Virtual table projects begin with **Z_APW**.
    3. In the **Privileges** list, click the column in front of **Use** to display the **Grant Privilege** icon.
    4. For each **Project** or **Folder** type, repeat these steps.
5. To grant access to the Z_APW_VirtualTables drawer, complete the following substeps.
    1. In the left pane, click **Drawer Privileges**.
    2. In the **Drawer** list, click **Z_APW_VirtualTables**.
    3. In the **Privileges** list, click the column in front of **Search** to display the **Grant Privilege** icon.
    4. To save the security settings and exit the dialog box, click **OK**.
6. To grant privileges to use the eForm, complete the following substeps.
    1. In **Management Console**, in the left pane, click **Forms**.
    2. Under **Form**, click **AP Invoice** > **Modify**.
    3. In the **Form** dialog box, in the left pane, click **Security**.
    4. In the **Presentation** list, click **AP Invoice**.
    5. Under **Users/Groups**, add or select the group or user.
    6. In the **Privileges** list, click the column in front of each of the following privileges to display the **Grant Privilege** icon.
        - **Create**
        - **Delete**
        - **Modify**
        - **View**
7. Click **OK**.

Schedule scripts to run

AP Invoice eForm includes scripts that you must run on a scheduled basis. We recommend adding a task with Windows Task Scheduler or Scheduled Tasks to run these scripts. For example, you could set the script to run on an hourly, daily, or weekly basis.

If using an active-active server environment, you can create tasks on each server instance. However, you only initially enable the tasks on the primary instance. In a server failure event, you enable the task on the secondary server.

The following table lists each script and our recommendations for scheduling a task.

Script	Recommendation
AP_Invoice_Export.js	Schedule this script to run once daily during the evening hours.
AP_VirtualTable_Updater.js	Schedule this script to run once daily during the evening hours. Depending on how often you push new data from your ERP, you may need to run this script more than once daily.
AP_Maintenance.js	Schedule this script to run once a minute. This eliminates the need to run this script manually when you make configuration changes.

Create the scheduled task

Windows Server 2003

To create a scheduled task with Windows Server 2003, complete the following steps.

1. Click **Start** > **Control Panel** > **Scheduled Tasks** > **Add Scheduled Task**.
2. In the **Scheduled Task Wizard**, click **Next.**
3. On the next page of the wizard, click **Browse**.
4. In the **Open** dialog box, navigate to the appropriate directory, click the appropriate script > **Open**.
5. On the next page of the wizard, type a name for the task, such as **Run AP_Maintenance.js**, click the preferred length of time, such as **Daily** > **Next**.
6. On the next page of the wizard, accept the defaults and click **Next.**
7. On the next page of the wizard, complete the following substeps.
    1. In the **Enter the user name** box, type ***<computer name>\<username>***.
    2. In the **Enter the password** box, enter the user password.
    3. In the **Confirm password** box, enter the user password and click **Next**
    4. Select **Open advanced properties for this task when I click Finish** > **Finish**.
8. In the ***<Task name>*** dialog box, on the **Schedule** tab, click **Advanced**.

    Note In an active-active server environment, select the **Enabled** check box when you schedule the task on the primary node. Clear the **Enabled** check box when you schedule the task on each secondary node.

9. In the **Advanced Schedule Options** dialog box, complete the following substeps.
    1. Select **Repeat task**.
    2. In the **Every** box, type the number and select the appropriate duration from the list. For example, type **10** and select **minutes** to run the script every 10 minutes.
    3. Select **Duration**.
    4. In the **hour(s)** box, type **24**.
    5. Click **OK**.
10. Click **OK**.

Windows Server 2008

To create a scheduled task with Windows Server 2008, complete the following steps.

1. Click **Start** > **Server Manager**.
2. In the **Server Manager** window, in the left pane, expand the **Configuration** tree and click **Task Scheduler**.
3. In the right pane, click **Create Task**.
4. In the **Create Task** window, on the **General** tab, complete the following substeps.
    1. In the **Name** box, type a name for the task, such as **Run AP_Maintenance.js**.
    2. Optional. In the **Description** box, type a description for this task.
    3. Under **Security Options**, complete the following substeps.
        1. Click **Change User or Group**,
        2. In the **Change User or Group** dialog box, in the **Enter the object names to select (examples)** box, type ***<computer name>\<username>*** and click **Check Names**.
        3. Click **OK**.
    4. Select **Run whether user is logged on or not**.
5. On the **Triggers** tab, complete the following substeps.
    1. Click **New**.
    2. In the **New Trigger** dialog box, complete the following substeps.
        1. From the **Begin the task** list, click **On a Schedule**.
        2. Under **Settings**, click **Daily**.
        3. Under **Advanced settings**, click **Repeat task every** > the appropriate time frame from the list.
        4. Click **OK**.
        5. Optional. In an active-active server environment, select the **Enabled** check box when you schedule the task on the primary node. Clear the **Enabled** check box when you schedule the task on each secondary node.
    3. Click **OK**.

6. On the **Action** tab, complete the following substeps.
    1. Click **New**.
    2. In the **New Action** dialog box, complete the following substeps.
        1. From the **Action** list, click **Start a program**.
        2. Under **Settings**, click **Browse**.
        3. In the **Open** dialog box, navigate to the appropriate directory, click the appropriate script > **Open**.
        4. Click **OK**.
    3. Click **OK.**
7. To create the task, in the **Create Task** dialog box, click **OK**.

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