

# Perceptive Accounts Payable Invoice eForm

## Update Guide

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## How to upgrade AP Invoice eForm?

This guide provides information on how to upgrade Accounts Payable (AP) Invoice eForm from a previous version to the latest version. Review this guide each time you update the AP Invoice eForm scripts, virtual tables, or any connector components.

Each release of AP Invoice eForm includes new features, enhancements, and bug fixes. Before you upgrade to the latest release, use this guide to determine its compatibility with your overall invoice processing solution.

### Assess upgrade options

To assess your upgrade requirements, review your current setup.

- Determine your current AP Invoice eForm version.
- Visit the Perceptive Software Customer Portal to determine the latest AP Invoice eForm patch or release version number.
- Review *AP Invoice eForm Release Notes* for all versions that are released after the version you are using to learn about the latest features and bug fixes.
- Consider the impact of any upcoming upgrades of your Perceptive Content server version. Refer to the [Compatibility matrix](#) to cross-reference Perceptive Content server and AP Invoice eForm versions.

Before proceeding with a self-service upgrade, consider the following information.

- Is your current AP Invoice eForm version 10.0 or higher?
- Do you have a simple configuration with little or no custom scripting?
- Do you enter data directly into the AP Invoice eForm rather than integrating with Intelligent Capture (Brainware)?
- Do you have a comprehensive test environment that fully replicates your production environment?
- Do you have a dedicated and knowledgeable administrator?

If the answer to any of these questions is no, Professional Services is recommended for your upgrade. Contact your Perceptive Software representative to discuss your upgrade options.

## Plan for the upgrade

### Compatibility matrix

The following table maps the compatible versions of Perceptive Content Server and Perceptive AP Invoice eForm.

To determine compatibility with versions of AP Invoice eForm prior to 10.0.0.28, contact your Perceptive Software representative.

Perceptive Content (ImageNow) Server	Perceptive AP Invoice eForm
6.5.1.149 to 6.6.x	10.0.0.28 to 12.x
6.7.x	10.1.0.307 to 12.x
6.8.x	10.4.0.234 to 12.x
7.x.x	12.1.0.169 to 12.11.x
Foundation EP2	12.11.x
Foundation EP3	12.11.x

### Review the Perceptive Content environment

To review your Perceptive Content environment, in Management Console, complete the following steps.

1. For ImageNow 6.7.x and higher only: Under Application Plans, verify you have an external-type application plan set up for AP Invoice eForm. To create this application plan, refer to the “Create an application plan” section of the *AP Invoice eForm Installation and Setup Guide*.
2. For Perceptive Content 7.0.x and Perceptive Content 7.1.x: When you upgrade AP Invoice eForm from previous ImageNow versions to Perceptive Content 7, the eForm installs in the default department. If you have created a specific department for AP Invoice eForm, you can share or transfer it from the default department to the destination department. For more information, refer to the “Transfer items to other departments” section of the *Department Administration Best Practices Guide* and “Manage transfer” section of Online Help.
3. For all versions of ImageNow: Under Views, verify that the view named Z\_APW All Projects, Z\_APW All Folders, or a custom view defined in the AP Invoice configuration, exists. To create this view, refer to the “Create a custom view and assign privileges” section of the *AP Invoice eForm Installation and Setup Guide 12.9.x*.

### Review virtual table updates

To review your AP Invoice eForm virtual tables, complete the following steps.

1. Review your existing process for generating CSV files. Periodically, new AP Invoice eForm versions update the required columns or the expected structure of the tables. Occasionally the eForm adds all-new required tables for major additions to functionality.
2. Verify that your CSV files create the virtual tables and columns required for the latest version of AP Invoice eForm. To review the required tables and their structure, refer to the *Perceptive AP Invoice eForm Connector Configuration Guide* for the latest eForm release.

**Note** You will [Purge the virtual tables](#) and repopulate with fresh data during the eForm upgrade.

## Review customized scripts

AP Invoice eForm includes the following scripts that may be customized for your solution.

- AP\_Custom\_Invoice\_Export.js
- AP\_Custom\_Validate\_Server.js
- AP\_Custom\_VirtualTable\_Funcs.js
- AP\_CustomValidation\_Client.js
- AP\_GetData\_Custom.js

The eForm does not overwrite these scripts during upgrades. However, new features in the eForm may cause custom functionality to break.

Familiarize yourself with any existing script customizations before you upgrade the eForm. After upgrading the eForm, test your custom script functionality.

## Consider Intelligent Capture implications

If your solution uses Intelligent Capture and the Perceptive Intelligent Capture (PIC) Connector for AP Invoice eForm, an upgrade may affect your overall process. The PIC Connector for AP Invoice eForm scripts shares a library and other files with AP Invoice eForm. You must upgrade both components simultaneously to keep them on the same build number. For instructions on how to upgrade PIC Connector for AP Invoice eForm, refer to *Perceptive Intelligent Capture Connector for AP Invoice eForm Installation Guide*.

**Note** Intelligent Capture Connector for AP Invoice eForm was previously called Perceptive Intelligent Capture Connector and Brainware AP Connector Scripts.

## Create test plan

Create a test plan that enables you to validate the upgraded version of AP Invoice eForm in a non-production environment. You should comprehensively test the eForm with all other solution components that you use before upgrading it in the production environment. Consider the following factors when you create a test plan.

- Standard and custom functionality in the AP Invoice eForm, such as lookups and validation
- Product and solution components outside of the AP Invoice eForm but part of the invoice processing solution, such as workflow, Mail Agent, Conversion Module (INMAC), and custom iScripts used in the solution
- New enhancements and updates that are included in the AP Invoice eForm Release Notes

For information on executing a test plan, refer to [Testing recommendations](#).

## Upgrade AP Invoice eForm

To upgrade the eForm, complete the tasks described in the following sections.

- [Backup the files](#)
- [Purge the virtual tables](#)
- [Upgrade AP Invoice eForm in a Windows environment](#) or [Upgrade AP Invoice eForm in a Unix environment](#)
- [Remove retired presentation files](#), if upgrading from AP Invoice eForm 10.2.x or previous.

### Backup the files

Before you upgrade AP Invoice eForm, the installer creates a backup of your existing AP Invoice eForm files in the following folders.

- **etc**
- **form** or **worksheet**
- **script**

**Recommended** Before you run the installer to upgrade, backup the installer of the previous version of AP Invoice eForm. Using this installer, you can restore the backed up version of AP Invoice eForm, whenever required.

### Purge the virtual tables

Virtual tables must be purged before upgrading AP Invoice eForm. To purge one or more virtual tables, refer to the “Purge obsolete data” in the *Perceptive AP Invoice eForm Connector Configuration Guide*.

## Upgrade Microsoft Dynamics AX Connector

If you are upgrading from Dynamics AX 3.0.x to Dynamics AX 4.0.x, complete the following steps.

1. Navigate to **[drive:]\<INServer>\etclap**.
2. Open the **AP\_Config.xml** file.
3. In the **AP\_Config.xml** file, under **<configurations>**, locate the **<connector>** tag.
4. Within the **<connector>** tag, replace the existing value with **DAXConnector\_v4**.

## Upgrade AP Invoice eForm in a Windows environment

To upgrade AP Invoice eForm in a Windows environment, complete the following steps.

1. Log in to Perceptive Content as an administrator.
2. Navigate to the **AP Invoice eForm ZIP file** that you downloaded.
3. Extract the **AP Invoice eForm <version>\temp** folder to the Perceptive Content server root directory, such as **C:\inserver**.

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

4. In **[drive:]\<INServer>\temp\apef\_install**, run the **apef\_install.bat** file.



5. After the batch file runs, to validate your configuration settings, complete the following substeps.
  1. Compare the previous eForm configuration files, stored in `[drive:]\<INServer>\temp\ap\backup_<date_time>` with the new files stored in `[drive:]\<INServer>\etc\ap`.
  2. Verify and adjust, if necessary, the configuration files to retain any previously configured settings.

## Upgrade AP Invoice eForm in a Unix environment

To upgrade AP Invoice eForm in a Unix environment, complete the following steps.

1. Log in to Perceptive Content server with user privileges same as the user under which the inserver processes are running. If Perceptive Content is running as a non-root user, the service account used for the inserver processes must be used to perform this upgrade.
2. Navigate to the Perceptive Content server root directory, such as `/opt/inserver`.
3. 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
```

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

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

5. Navigate to the `/<INServer>/temp/apef_install` directory.
6. To execute the AP Invoice eForm installer, type the following command.

```
./apef_install.sh
```

7. After the shell script runs, to validate your configuration settings, complete the following substeps.
  1. Compare the previous eForm configuration files, stored in `<INServer>/temp/ap/backup_<date_time>` with the new files stored in `<INServer>/etc/ap`.
  2. Verify and adjust, if necessary, the configuration files to retain any previously configured settings.
  3. Optional. If you perform the update through a user account different from the account used for the inserver processes, you must update the ownership of the new files to the correct user and group.
8. Optional. To preserve disk space, delete 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.

## Populate the virtual tables

To populate the virtual tables with the latest CSV data, refer to “Import and archive the data” in *Perceptive AP Invoice eForm Connector Configuration Guide*.

## Remove retired presentation files

To upgrade AP Invoice eForm from version 10.2.x or previous, you must review and remove specific presentation files for AP Invoice eForm. Complete the following steps.

1. In **Management Console**, in the left pane, click **Forms > Manage Form Components**.
2. In the **Manage Form Components** window, in the left pane, click **Presentations**.

3. In the **Presentation Name** column, click **AP Invoice > Modify**.
4. In the **Presentation** window, in the left column, click **Files**.
5. In the **File Name** column, find each of the following files, if they exist, and click **Remove**.
  - AP\_GetGLCodes\_Client.js
  - AP\_GetVendors\_Client.js
  - AP\_SkinHandler.js
  - AP\_Validation\_Client.js
  - AutoComplete.css
  - bg\_bizinfo.gif
  - bg\_invoiceinfo.gif
  - close.gif
  - cookies.js
  - DIV\_FLOATING.js
  - find\_down.gif
  - find\_over.gif
  - psi.jpg
  - row\_add.gif
  - row\_add\_down.gif
  - row\_add\_over.gif
  - roww\_remove.gif
  - row\_remove\_down.gif
  - row\_remove\_over.gif
  - start\_search\_over.gif

## Testing recommendations

After you upgrade to the latest version of AP Invoice eForm in a non-production environment, you should execute your test plan to test the new enhancements, bug fixes, and existing functionality. Before you execute your test plan, ensure that all Perceptive products that you use with the AP Invoice eForm are configured properly and the services that the Perceptive products use are running. Check the following points after installing the upgrade.

- Ensure that the AP Installer log has no errors reported.
- Open the updated config or script files to ensure that they display the correct version numbers.
- Open an eForm and verify that the version displayed on the form matches with the version of config files, and the company code drop-down list displays the appropriate data.

## Execute test plan

When you execute a test plan, ensure that you adhere to it exhaustively. Your test plan should include testing different functionalities of your AP Invoice eForm and end-to-end invoice processing that involves all Perceptive products that you use with the eForm.

### Test complete invoice processing

Testing complete invoice processing ensures that Perceptive Content, ERP connector, and the associated ERP application are configured properly with the AP Invoice eForm. This also tests any customized scripts that you use and other settings that are customized based on your requirements.

You can consider the following test scenarios to test complete invoice processing.

- Fill out an eForm with correct data and route it through validate server and then export.
- Test negative scenarios like duplicate invoice, distribution error, GL Code Invalid error, and so forth.
- If your solution includes SAP connector, test with CreateInvoice, ParkInvoice, PostInvoice, and CancelInvoice operations on your SAP application in your test environment.

In case of any errors, identify whether the error occurred in AP Invoice eForm, ERP Connector, ERP application, or any other Perceptive product. If the error occurs in any Perceptive product, refer to the error log of the respective Perceptive product for more details.

### Test in thin client

If you use thin client, you can follow the same test plan that you used for Perceptive Content to test functionality after the AP Invoice eForm upgrade.

## Troubleshooting and support

While testing end-to-end invoice processing, you may need to reconfigure different settings in AP Invoice eForm. Based on your solution, you can refer to the appropriate version of following documents for more information.

### AP Invoice eForm

- *Perceptive AP Invoice eForm Installation Guide*
- *Perceptive AP Invoice eForm Advanced Design and Setup Guide*
- *Perceptive AP Invoice eForm Connector Configuration Guide*
- *Perceptive AP Invoice eForm Virtual Tables Migration Guide*
- *Perceptive Intelligent Capture Connector for AP Invoice eForm Installation Guide*
- *Perceptive AP Invoice eForm Release Notes*
- *Online Help*

You can also contact your Perceptive Software representative for any support queries.