

Brainware for Invoices Installer

Installation Guide

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About Brainware for Invoices Installer

The Brainware for Invoices installer installs Brainware for Invoices (BFI) 3.0 on a server with Brainware Intelligent Capture 5.8.1 or higher running on it. The installer automates the following tasks:

- Creation of project directory structure and copying of Brainware for Invoices related files.
- Creation of Intelligent Capture Application Library (ICAL) directory and DLL registration.
- Creation of BFI configuration database.
- Creation of BFI reporting database.
- Creation of BFI specific registry values.
- Creation of Run Time Server instances.

Note: The installer is available for new installations and does not support upgrading from a previous version of BFI at this time. If you need to upgrade or install on an earlier version of Brainware Intelligent Capture, refer to the Brainware for Invoices Installation Guide.

Software Prerequisites

Brainware Intelligent Capture

The Brainware for Invoices installer requires Brainware Intelligent Capture 5.8.1 or higher and must be executed on a server with Intelligent Capture Runtime Server. Refer to the Brainware Intelligent Capture Installation Guide for installation instructions.

Microsoft .NET Framework 3.5 SP1

Brainware For Invoices needs .NET Framework 3.5 SP1 to run. Prior to executing the installer, it must be ensured that the server has .NET Framework 3.5 SP1 installed.

SAP .NET Connector Components

If SAP support is required, download the **SAP .NET Connector 3.0 for .NET 2.0 on x86** and install it on all machines running the solution.

You can download this connector from the SAP Service Marketplace. The download is in the form of a ZIP file called **sapnco30P_20-20007347.zip**.

Once downloaded, complete the following steps to install and set up SAP for BFI.

1. Extract the ZIP file into the directory of your choice.
2. Double-click the file called **NCo3020_Net20_x86.msi** to launch the installer.
3. Follow the instructions provided by the installer and complete the installation. You need to make a note of the directory where the connector was installed. This is usually **C:\Program Files (x86)\SAP\SAP_DotNetConnector3_Net20_x86**.

Oracle Client Components

If Oracle database access is required, Oracle Client must be installed and Oracle Data Access Components (ODAC) must be installed and registered in the GAC. Specifically, you need to download the ODAC 32 bit components for the version of Oracle client installed, and then register the components into the GAC following the instructions provided by Oracle. For more information on installing the Oracle components, refer to the Oracle Product Installation Guide.

Installation and Setup Process

The following steps are a high-level overview of the procedures that you need to perform to install Brainware for Invoices using the installer.

- Run the Brainware_Invoice_Solution.exe as administrator.
- Read and accept the End User License Agreement.
- Select an installation directory and project file name.
- Select a database creation option.
- Define the configuration database connection string.
- Define the reporting database connection string.
- Define the Intelligent Capture Application Library (ICAL) installation path.
- Define the Runtime Service instance configurations.
- Complete the installation.

Run the Installation Wizard

The Brainware for Invoices installer must be run as an administrator.

To run the installation wizard, complete the following steps.

1. Run the Brainware_Invoice_Solution.exe as administrator.
2. Click **Next** on the **Welcome** screen.
3. Read and accept the End User License Agreement.

Define an Installation Directory

The Install Directory screen allows you to define the installation directory for the Brainware for Invoices project. This path can be local to the server or a UNC path; however, the user running the installer must have access rights to this directory. Additionally, you can define the Brainware for Invoices project file's name. During installation, the following three directories are created within the defined installation directory.

- Import – The Runtime Server Instance for Import is configured to poll this directory for incoming documents.
- Global – The project, INI, sample CSVs, and Train directory are copied to this location. The project and INI files are then renamed to the defined Project file name.
- Export - The Runtime Server Instance for Export is configured to export documents to this directory.

Create a Database

On the Database Creation screen, you can choose to have the installer create the configuration and reporting databases automatically or manually. If you choose manual installation of the databases, the location of the required database scripts is displayed on the screen.

Define Database Connections

On the Database Connection screens, you must define the database connection string to the Brainware for Invoices configuration database and then the Brainware for Invoices Reporting database. If you chose to have the installer create the database, you must also define the database name.

To define database connections, complete the following steps.

1. Click the **Change** button within the **Database Connection** screens. A dialog appears and allows you to easily build the connection string by selecting the OLEDB provider, servername, and authentication method. You can also test the connection from this dialog.
2. Click the **Next** button. The connection is validated prior to continuing the installer. Additionally, if the database already exists, a message appears asking if you want to overwrite the existing tables.
 - Click **Yes** to overwrite the existing database.
 - Click **No** to only create missing tables.
 - Click **Cancel** to go back to change your connection string.

ICAL Registration

The ICAL Registration screen allows you to define the installation directory for the Intelligent Capture Application Library DLLs. This path must be local to the server, and the user running the installer must have access rights to this directory.

Additionally, you must select the appropriate options if your implementation includes the following.

- Oracle database access for the configuration database, reporting database, database validations, or database export. The installer confirms whether the Oracle Client is installed prior to continuing the installation, if Oracle is selected.
- SAP integration. If SAP is selected, you must define the path to the SAP .NET Connector installation directory.

Runtime Servers

During installation, the installer creates one RTS instance for Import and one RTS instance for Export. On the Runtime Servers screen, you can specify:

- Number of OCR, Classification, and Extraction (OCE) RTS Instances. By default, this number is the number of available cores on the server-1 for processing most documents as quickly as possible; however, this number can be lowered, if needed.

- **Limit Batch Size** – This option allows you to limit the number of documents imported into a Brainware Intelligent Capture batch. The Import RTS instance is configured to poll for sub-directories and any sub-directory with more than this number of files is split into multiple batches based on the number defined. The default setting is 10 documents.
- **Clean Up Batch Time Limit (hours)** – The Export instance is automatically configured by the installer to perform clean-up of old batches. You can define the amount of time which must pass after successful export of the batch before clean-up of the batch is executed and the batch is deleted. The default setting is 240 hours.
- **Job Name** – You can define the Database Job name where the RTS instances are performing their work. This value defaults to the Project file name defined on the Installation Directory screen.
- **Auto System Update Time** – The Import instance is automatically configured by the installer to perform updates to the Associative Search Engine pools every 24 hours. You can define the time when this update should occur. The default is 12:00 AM local server time.

During the installation, the Runtime Manager service is restarted.

Complete the Installation

You can review your options prior to executing the installation and then complete your installation.

To view the installation summary and finish installation, complete the following steps.

1. Review a summary of the installation options you have selected on the **Summary** screen.
2. Use the **Previous** button to make changes to any of your selections.
3. Click **Install** once you have reviewed and are satisfied with your configuration.
4. A progress bar displays the progress of the installation. Upon completion, the **Completed the Brainware for Invoices Setup Wizard** screen is displayed.
5. Click **Finish** to exit.

Uninstall Brainware for Invoices

You can uninstall Brainware for Invoices via Add/Remove Programs or running the Brainware_Invoices_Solution.exe as administrator a second time and selecting **Uninstall**. Any database installed with Brainware for Invoices is not removed via the Uninstall process. Once Uninstall has completed, click **Finish** to exit the wizard.