Perceptive Intelligent Capture Visibility

Upgrade Guide

Version: 3.0.x

Lexmark™ Enterprise Software
formerly Perceptive Software

Table of Contents

Upgrade Process

To upgrade Visibility, you must complete the following steps.

1. Create back ups
2. Uninstall current version of Visibility
3. Install new version of Visibility
4. Restore Visibility configurations
5. Start report services
6. Post-upgrade checklist

Note The Visibility upgrade automatically upgrades the repository tables. After the upgrade process, any previous versions of Visibility no longer work with the upgraded repository. Detailed information about the repository database is available on the Database page of portal. To view details using the portal, click **Navigation** > **Administration** > **Configure** > **Database**.

Create Backup Files

Save backups of the files listed below. You will restore these files at the same location or merge the details of the existing files to the new files after the updated installation.

Note For an older version of Visibility 2.0, the path is [*drive*:]\Program Files\Brainware Visibility. For the newer 3.0 version, the path is [*drive*:]\Program Files\ Perceptive Visibility.

File or Folder	Description	Path
ReportEngine.lic	This file is for reference purposes only. Before you perform an upgrade, request a new license file from customer support.	[drive:]\Program Files\Perceptive Visibility\ReportEngine\bin
Encr_ReportEngine.dat / ReportEngine.dat	This file must be restored in new installation directory.	[drive:]\Program Files\Perceptive Visibility\ReportEngine\Config
rpg folder	This folder contains published report outputs. Back up the entire folder.	[drive:]\Program Files\Perceptive Visibility\ReportEngine
data folder	You need to complete a backup of the data folder only if one of the data connections point to DemoReportDB/ DemoRepositoryDB/HSQLDB database	[drive:]\Program Files\Perceptive Visibility\ReportEngine

File or Folder	Description	Path
mails folder	Complete a backup of the mails folder only if you have modified a mail message template.	[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\config\messages
Adhoc Template folder	This folder contains adhoc report template files. Back up any files you have modified. **Note** Back up all report layouts (.irl files) before editing them in 3.0 Designer Studio.	[*drive*:]\Program Files\ Perceptive Visibility\ReportEngine\templates
ReportEngine.properties	Changes made on the Server Configuration page (Navigation > Administration > Configure > Server) of the portal are stored in this file. **Note** This should be for reference purpose only as new properties file will have new properties also. The user needs to merge the old properties in with new properties file.	[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\Config
CategoryPropertiesInfo.xml	This configuration file stores properties as property values so that these values are set after you install Visibility 3.0.	[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\Config
QOPropertiesInfo.xml	This configuration file stores properties as property values so that these values are set after you install Visibility 3.0.	[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\Config
ReportPropertiesInfo.xml	This configuration file stores properties as property values so that these values are set after you install Visibility 3.0.	[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\Config
exin_validations.xls (if it is available)	This configuration file stores properties as property values so that these values are set after you install Visibility 3.0.	[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\Config

File or Folder	Description	Path
FormatMapping.xls (if it is available)	This configuration file stores properties as property values so that these same values are set once Visibility 3.0 is installed.	[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\Config
databasemapping.xls (if it is available)	This configuration file stores properties as property values so that these same values will be set once Visibility 3.0 is installed.	[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\Config
ReportClient.properties	Changes made on Client Configuration page (Navigation > Administration > Configure > Client) of the portal are stored in this file. **Note** This should be for reference purpose only as new properties file will also have new properties. The user needs to merge the old properties in with new properties file.	[*drive*:]\Program Files\Perceptive Visibility\Jakarta\webapps\visibility\client\config
Localeconfigurations.xls	This contains locale-related configurations changed by the user.	[*drive*:]\Program Files\Perceptive Visibility\Jakarta\webapps\visibility\client\config\i18n
resourcebundles folder	Back up this folder if it exists in the displayed path.	[*drive*:]\Program Files\Perceptive Visibility\ReportEngine
en_US.xls	Back up this file if you have modified the default language bundler. **Note** Make a backup of all other bundler files present at the displayed path in case you have created custom bundler files. You need to update your bundler file for new entries introduced in 3.0.	[*drive*:]\Program Files\Perceptive Visibility\Jakarta\webapps\visibility\client\lang

Uninstall Current Version of Visibility

To uninstall your previous version of Visibility, complete the procedures in the following sections.

Stop Reporting server

- Open the Services MMC (Services.msc) and stop the Perceptive Visibility Reporting Service.

  Note Stop all other applications that are using Visibility.

Uninstall Visibility

Instructions on how to uninstall Visibility are provided in the InstallingVisibilityOnWindows.pdf document. This file can be found in the following location.

[*drive*:]\Program Files\Perceptive Visibility\docs\Manuals

Delete specific folders

The uninstall program may not delete some of the folders. Make sure the following folders are deleted.

Note For a version of Visibility 2.0, the path is [*drive*:]\Program Files\Brainware Visibility. For Visibility 3.0, the path is [*drive*:]\Program Files\Perceptive Visibility.

1. The **[*drive*:]\Program Files\Perceptive Visibility\Jakarta** folder contains old compiled class files and old Tomcat server. If this folder is not removed, Visibility may continue using old files, which can cause unexpected results or errors.

2. The **[*drive*:]\Program Files\Perceptive Visibility\jre** folder contains Java Runtime. If this folder is not removed, Visibility may continue using old files, which can cause unexpected results or errors.

3. The **[*drive*:]\Program Files\Perceptive Visibility\ReportEngine** folder contains old log files and other property files. If this folder is not removed, Visibility may return unexpected results or errors.

4. The **[*drive*:]\Program Files\Perceptive Visibility\winclient\Studio** folder contains old log files and other property files. If this folder is not removed, Visibility may return unexpected results or errors.

Install Visibility 3.0

The steps to Install Visibility 3.0 are provided in the Perceptive Visibility 3.0 Installation and Setup Guide, which is located on the Customer Portal. Restart the machine after installation is complete.

Note The default installation folder is [*drive*:]\Program Files\Perceptive Visibility instead of [*drive*:]\Program Files\Brainware Visibility. Also, the reporting service name is Perceptive Visibility Reporting Service.

Restore Visibility Configurations

After installing Visibility, complete the steps in the following sections to bring Visibility to the level it was at before the installation.

Note Stop Visibility Report Server and Visibility Portal before restoring the configuration.

Restore ReportEngine.dat

In Visibility 3.0, an encrypted DAT file, Encr_ReportEngine.dat, is used for security purposes. However, users can also use their older ReportEngine.dat file if needed.

1. Rename the existing **Encr_ReportEngine.dat** file located in the following path.

   [*drive*:]\Program Files\Perceptive Visibility\ReportEngine\Config\

2. Place the backed up copy of the **ReportEngine.dat** file in the same location.

A copy of the default ReportEngine.dat file is saved as **ReportEngine_setup.dat**, based preferences you specified during installation.

Warning By default, Visibility 3.0 **ReportEngine.dat** contains connections based on an H2 database as compared to previous versions based on the HSQLDB database. If this file is replaced, new H2 database connection details will be lost. The user will need to merge old connections into this file if the user wants to use older and newer connections simultaneously.

Restore the RPG folder content

Place the backed up contents of the RPG folder into the following location.

[*drive*:]\Program Files\Perceptive Visibility\ReportEngine

Restore the data folder content

Place the backed up contents of the data folder into the following path.

[*drive*:]\Program Files\Perceptive Visibility\ReportEngine

Note Only replace the data folder if one of the data connections points to the H2/HSQLDB database.

If your repository connection points to H2 database, for example, DemoRepositoryDB, the same will be upgraded to the latest version at the time Report Engine starts up.

Warning The new default repository is based on the H2 database as compared to older versions that were designed on the HSQLDB Database. The new repository folder structure is also different as compared to the older one. For using the old repository, the user needs to add the old ReportEngine.dat file. The old ReportEngine.dat file does not work on the new repository unless it has connections for accessing the new repository.

Restore the mails folder content

You only need to replace the contents of the mails folder if these files were modified to change the mails message template. Place the backed up contents of the mails folder into the following path.

[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\Config\messages

Note In Visibility 3.0, new files have been introduced in the \ReportEngine\Config\messages\mails folder.

Restoring the modified template files

Replacing this folder removes the new adhoc templates provided with Visibility 3.0 and is not recommended. These files were modified to change the adhoc template. Place the backed up template files into the following path.

[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\templates\

Restoring resourcebundles

Place the backed up resourcebundles folder into the following path.

[*drive*:]\Program Files\Perceptive Visibility\ReportEngine

Restoring en_US.xls file

If you have modified the en_US.xls language bundler file, you must merge those changes into the latest language bundler file present at path.

[*drive*:]\Program Files\Perceptive Visibility\Jakarta\webapps\visibility\client\lang

Note Restore all other bundler files present at the above location in case you have created custom bundler files. Bundler files for the old version of Visibility do not work with the Visibility 3.0 due to file format changes.

Configurations

Configuration-related information is stored in various properties files (shown according to the path where they are located).

For Report Engine

[*drive*:]\Program Files\Perceptive Visibility\ReportEngine\Config

- ReportEngine.properties
- CategoryPropertiesInfo.xml
- QOPropertiesInfo.xml
- ReportPropertiesInfo.xml
- exin_validations.xls
- FormatMapping.xls
- databasemapping.xls
- ReportServerProperties.xml
- \i18n\localeconfigurations.xls

For Web Client

[*drive*:]\Program Files\Perceptive Visibility\Jakarta\webapps\visibility\client\config

- ReportClient.properties

If you have modified property values in any of the above files from the portal or by directly editing the respective file, you need to change the respective property from the portal or begin directly editing the file so that your older changes will merge with new file.

Starting the Servers

Navigate to Service Manager and start the Perceptive Visibility Reporting Service. This starts both the Report Server and Web Server.

Post Upgrade Checklist

After the report server and web server starts, check the following sections to verify that you have successfully upgraded Visibility to version 3.0.

Check users

Check that Visibility has imported all the user detail (user names as well as access rights and system privilege information). On the portal, click **Administration** > **Manage Users** and the respective tabs. If you find any of the users are missing, contact Perceptive Software support.

Check report objects

Visibility has imported all the Query objects and Parameter objects on the root level. To get the benefit of the enhanced categorization and access rights of report objects, you need to move these objects into their respective categories.

You can use a mass operation function on report objects to move these objects. A mass operation function is available through Repository explorer.

Complete the following steps to move report objects into their respective categories.

1. Go to the **Data Model**.

2. Select multiple Query objects or Parameter objects from the root folder.

3. Select the **Cut** menu.

4. Select the category to which you want to move the selected objects.

5. Open the **Query objects** or **Parameter objects** folder.

6. Paste the selected objects.

Check report layouts

Check that Visibility has imported all the report layouts (report layouts along with folders or categories).

If you find that any of the report layouts, folders, or categories are missing, contact Perceptive Software support.

Check saved reports

Check that all the saved reports are also available. To get a list of saved reports, click the Published icon of the respective report on the Report List for category page. To search for published reports, click **Reports** > **Published Reports** and provide search criteria.

If you find that any of the saved reports are missing, contact Perceptive Software support.

Check scheduler objects associated with report

Check that Visibility has imported all the scheduled objects associated with a report, both private and public. If location of the report has moved to another category or sub-category by way of applying mass operation, all such associated objects should work smoothly, ensuring report id is not changed.

Upgrading Report Objects

After upgrading to Visibility 3.0, you need to deploy the latest 3.0 CAB files on the server. Visibility 3.0 includes four default categories stored within three CAB files. The Capture CAB file contains **Capture** and **Custom** categories and should be deployed for all installations. The Verifier CAB file contains the **Verifier** category and should also be deployed for all installations. The AP CAB contains the **Accounts Payable** category and should be deployed for installations using Intelligent Capture for Invoices.

Note It is important that all customized reports and custom built reports are moved from the Visibility 2.0 Distiller, Accounts Payable, and Verifier categories to the Custom category prior to deploying the new CABs. The Visibility 3.0 CAB file overwrites any existing object with the same object name and completely removes the Visibility 2.0 Distiller category.

User Access Rights

Visibility 3.0 Capture CAB file includes a new category named Capture. This category includes updated reports from the Visibility 2.0 Distiller category. The 2.0 Distiller category is completely removed by the new CAB, so you should take note of the Access Rights of the Users and Roles assigned to the Distiller category prior to deploying the 3.0 CAB files. Once the new CABs are deployed, the same Access Rights should be assigned to the Capture category.

Reporting Database Update

Visibility 3.0 introduces a new Client ID parameter within report execution. This parameter allows you to filter the report results by Client ID stored within BRWDOCUMENT.CLIENTID. This new column was introduced in Perceptive Intelligent Capture for Invoices (PIC for Invoice) 2.1. For installations prior to or excluding PIC for Invoices 2.1, the following query needs to be executed on the Visibility Reporting database.

SQL implementations:

```
-- ************* UPDATE SCRIPT FOR VISIBILITY 3.0 USE WITH PICI VERSIONS < 2.1  ************* --

-- PREAMBLE - This script is intended to add the CLIENTID column to BRWDOCUMENT for use with
Visibility 3.0
-- Running this script is only required if using Intelligent Capture for Invoices projects prior
to version 2.1
-- The script will set a default client ID for all documents processed through PICI.

-- Search for "DEFAULT('0')" and update the '0' with the default Client ID you want to use
-- --------------------------------------------------------------------------------------------- --

IF COL_LENGTH('BRWDOCUMENT','CLIENTID') IS NULL
        BEGIN
                ALTER TABLE BRWDOCUMENT
                ADD CLIENTID varchar(10) NOT NULL DEFAULT('0') -- Update the '0' with the default
Client ID you want to use
                ALTER TABLE BRWDOCUMENT
                ALTER COLUMN CLIENTID varchar(10) NULL
        END
```

Oracle implementations:

```
DECLARE
v_exist  number;
v_ClientID varchar2(2) := 0; -- Update the 0 with the default Client ID you want to use
BEGIN

    SELECT count(*) INTO v_exist FROM user_tab_cols WHERE table_name='BRWDOCUMENT' AND
column_name='CLIENTID';

IF v_exist < 1  THEN
    EXECUTE IMMEDIATE 'ALTER TABLE BRWDOCUMENT ADD CLIENTID  varchar2(10) DEFAULT
'''||v_ClientID||''' NOT NULL';
    EXECUTE IMMEDIATE 'ALTER TABLE BRWDOCUMENT MODIFY CLIENTID varchar(10) NULL';
END IF;


END;
```

Deploying New CABs

Deploy the Visibility 3.0 CAB files. The steps to deploy Visibility 3.0 CAB files are provided in the Perceptive Visibility 3.0 Installation and Setup Guide on the Customer Portal.

Updating User Access Rights

After deploying the Visibility 3.0 Capture CAB file, the access rights to the Capture category need to be applied. The steps to assign access rights in Visibility 3.0 CAB files are provided in the Perceptive Visibility 3.0 Installation and Setup Guide on the Customer Portal.