Perceptive Accounts Payable Invoice eForm

Installation and Setup Guide

Version: 10.5.0.x
Compatible with ImageNow Versions: 6.5.1.149 to 6.7.x

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Overview

The Perceptive Accounts Payable Invoice eForm solution is a ready-to-use form for processing and approving invoices for payment that you can configure to fit your company's specific Accounts Payable operations. The following procedures demonstrate how to install the form on ImageNow. After completing the installation, you must configure the form to work in your environment.

You can use this eForm with Enterprise Resource Planning (ERP) applications such as Lawson, PeopleSoft, and Microsoft Dynamics AX. You can use the eForm for virtually any business application that is used to process invoices for payments. In order to install the eForm for any other business application, choose the business application option that best fits your scenario.

Installation requirements

ImageNow Client

You must be running ImageNow version 6.5.1.149 to 6.7.x.

For an active-active server environment, you must run ImageNow version 6.7.0.2717 or higher.

Note If you are running previous versions of ImageNow, please contact Product Management for more information on installing the AP Invoice eForm.

Licenses

For the initial installation of the Accounts Payable Invoice eForm, you must have the following licenses:

- Uploaded Form license
- Uploaded iScript license

For assistance with licenses, contact your Perceptive Software representative.

Software

Perceptive AP Invoice eForm versions 6.6.0.442 and higher require the following additional software on each workstation:

- Internet Explorer, version 8 or higher

Active-active server environments

Perceptive AP Invoice eForm supports ImageNow 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 ImageNow Server runs independently of the other. You only install AP Invoice eForm on the primary server instance.

For more information about active-active environments, refer to the *ImageNow High Availability Overview Technical Guide* and the *ImageNow Server and Client Installation and Setup Guide*, available in the Customer Portal on the Perceptive Software website.

Prepare for installation

Prior to installing the form, complete the following planning activities.

Form design

1. **Review the invoice header information.** Verify that the form header contains all of the data that you need to capture. You can use eight optional amount fields and 10 optional text fields to accommodate any additional values you need to capture. For more information, refer to the "AP_Skin.xml" portion of the "Accounts Payable Invoice eForm configuration files" section in the *Perceptive AP Invoice eForm Supplemental Guide*.

2. **Review the invoice detail for Non-PO invoices (GL coding).** Verify that the invoice detail defines all necessary GL account fields. If you need to capture any additional values, activate and use any of the 24 optional fields. For more information, refer to the "AP_Skin.xml" portion of the "Accounts Payable Invoice eForm configuration files" section of the *Perceptive AP Invoice eForm Supplemental Guide*.

3. **Review the invoice detail for PO-based invoices (PO matching).** The PO detail lines include standard fields such as quantity, unit of measure, unit price, and extended amount, which you cannot repurpose. However, there are 10 optional fields you can use to capture additional information at the PO line level. For more information, refer to the "AP_Skin.xml" portion of the "Accounts Payable Invoice eForm configuration files" section of the *Perceptive AP Invoice eForm Supplemental Guide*.

Workflow design planning – invoice entry/import

1. **Review the current workflow.** Identify the queues where invoice entry occurs.

2. **If you are doing manual entry, verify that every entry queue is set up for invoice entry.** For more information, refer to the "Configuring workflow for Accounts Payable Invoice eForm" section in the *Perceptive AP Invoice eForm Supplemental Guide*.

3. **If you are importing invoices from Intelligent Capture, you need to set up an import queue in the workflow.** You should have an inbound action, AP_ValidateServer.js, on the import queue that processes the incoming data. For example, the queue might pull vendor and PO information for PO-based invoices. You should also have a within queue routing rule which routes PO and non-PO invoices into the implementation workflow based on the current process flow. For more information, refer to the "Demonstration Setup for AP Invoice eForm" section in the *Perceptive AP Invoice eForm Supplemental Guide*.

Workflow design planning – Invoice entry validation

- **Each point in the workflow process where changes can occur to the form requires validation.** After items route to the form queue where form changes occur, they should flow into an invoice validation queue that includes the AP_ValidateServer.js script as an inbound action. This script not only validates the data; it also sets document key values and custom properties. This queue should also have a within queue routing rule that handles routing the invoice. For more information, refer to the "Demonstration Setup for AP Invoice eForm" section of the *Perceptive AP Invoice eForm Supplemental Guide*.

Workflow design planning – non-PO invoice GL entry and invoice approval

- **Determine the preferred points of the workflow to capture GL coding and approve invoices.** Verify that workflow queues involved are set up for form processing. For more information, refer to the "Demonstration Setup for AP Invoice eForm" section in the *Perceptive AP Invoice eForm Supplemental Guide*.

Workflow design planning – PO-based invoice exception matching

- **Determine the points of the workflow where PO matching should occur.** Verify that workflow queues involved are set up for form processing. For more information, refer to the "Demonstration Setup for AP Invoice eForm" section in the *Perceptive AP Invoice eForm Supplemental Guide*.

Define workflow queue roles

You must list each workflow queue that uses the form in the <*roles*> section of the AP_Skin.xml file in the [*drive:*]\inserver6\etc\ap directory. In an active-active server environment, locate AP_Skin.xml in the [*shared path*]\inserver6\etc\ap directory.

This file determines the role the eForm plays in the workflow queue and the eForm viewing options. For more information, refer to the "About workflow queue roles" and "AP_Skin.xml" sections in the *Perceptive AP Invoice eForm Supplemental Guide*.

Install Accounts Payable Invoice eForm on Windows

To install the AP Invoice eForm, complete the following procedures.

Download the files

1. Go to the Perceptive Software website at www.perceptivesoftware.com and log in to the Customer Portal.
2. In the **Product Downloads** page, search for the **Perceptive AP Invoice eForm** file specific to your ERP.
3. Download the relevant files to a temporary directory on your computer.

Install AP Invoice eForm

To install AP Invoice eForm, you 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.

To upgrade AP Invoice eForm from an earlier version, proceed to the "Upgrade Accounts Payable Invoice eForm" section of this document.

Complete the following steps.

1. Navigate to the **AP Invoice eForm ZIP file**.
2. Extract the **AP Invoice eForm <***version***>\inserver6\temp** folder to **[***drive:***]\inserver6**.

   Note If prompted to merge folders, click **Yes**.
3. In **[***drive***:]\inserver6\temp\apef_install**, run the **apef_install.bat** file.

Finish Invoice eForm installation

The eForm installation process sets up the necessary custom properties, document types, virtual tables, and the eForm. After this, you can configure the form, modify the workflow process, load data, and perform other configuration tasks. For more information, refer to the *Perceptive AP Invoice eForm Supplemental Guide*.

Upgrade Accounts Payable Invoice eForm

To upgrade the AP Invoice eForm from any version prior to 10.3.x, complete the "Upgrade AP Invoice eForm" and "Remove specific presentation files" procedures. Then, review the following procedures and complete any as necessary.

- Installations with ImageNow 6.7.x require an external-type application plan. To create an application plan, refer to the "Create an application plan for Accounts Payable Invoice eForm" section.

- Review your existing process for generating CSV files to verify that the required Virtual Tables and columns exist. For information on the tables and columns required, refer to the "Update the virtual tables" section of this document, and the *Perceptive AP Invoice eForm Supplemental Guide*.

- If upgrading from any version prior to 10.5.x, purge all Virtual Table data from the system and re-import your CSV files to populate the tables.

- In ImageNow, verify that the Z_APW All Projects, Z_APW All Folders, or a custom view exists. To create this view, refer to the "Create a custom view definition" section.

Upgrade AP Invoice eForm

To upgrade AP Invoice eForm, complete the following steps.

1. Navigate to the **AP Invoice eForm ZIP file**.

2. Extract the **AP Invoice eForm <*version*>\inserver6\temp** folder to **[*drive:*]\inserver6**.

3. In **[*drive:*]\inserver6\temp\apef_install**, run the **apef_install.bat** file.

4. After the batch file runs, compare the old eForm configuration files, stored in **[*drive:*]\inserver6\temp\apef_install\converted_configs**, with the new configuration files, stored in **[*drive:*]\inserver6\etc\ap**.

   Note If you install AP Invoice eForm in an active-active server environment, you can find the new configuration files stored in **[*shared path*]\inserver6\etc\ap**, rather than on the local drive.

5. Adjust the new configuration files to retain any previously configured settings.

6. Check the CSV files and verify them against the required columns for each table, as detailed in the *Perceptive AP Invoice eForm Supplemental Guide*.

Remove retired presentation files

To upgrade to AP Invoice eForm from a version prior to 10.3.x, you must review and remove specific presentation files for the 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 **Presentations 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

Create an application plan for Accounts Payable Invoice eForm

To use AP Invoice eForm with ImageNow 6.7.x, you must create an application plan to load data into the virtual tables. To continue installing the AP Invoice eForm on an ImageNow version prior to 6.7.x, proceed to the "Configure the Accounts Payable Invoice eForm" section of this document.

To create an external type application plan for use with ImageNow interfaces, such as iScript or Message Agent, complete the following procedures.

- Create the new application plan

- Add the dictionary values

- Create the folder levels

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

Create the new application plan

To create an application plan for AP Invoice eForm in ImageNow 6.7.x, complete the following steps.

1. In **Management Console**, in the left pane, expand the **Application Plans** tree, and click **External**.

2. In the right pane, on the **Applications** tab, click **New**.

3. In the **Plan Settings** dialog box, click the **General** tab.

4. 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**.

Add the dictionary values

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

1. In the **Application Plan Designer**, in the **Dictionary** pane, click the **New Field** button. In the **Dictionary Field** dialog box, complete the following substeps.

    1. In the **Name** box, type **FOLDER_NAME**.

    2. Click **OK**.

2. In the **Dictionary pane**, click the **New Field** button again. In the **Dictionary Field** dialog box, complete the following substeps.

    1. In the **Name** box, type **FOLDER_TYPE**.

    2. Click **OK**.

Create the folder levels

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

1. In the **Document** pane, 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.

Configure the Accounts Payable Invoice eForm

After installing Accounts Payable Invoice eForm, you must complete the following procedures. The installation process creates two document types, Invoice and Credit Memo, and all the custom properties used in conjunction with the Accounts Payable Invoice eForm solution.

Update the virtual tables

Perform this procedure to synchronize the data between the virtual tables in the ImageNow database and your business application at any time. This procedure might take several hours to complete processing. If you installed ImageNow Server on a drive other than C:\, or you are using a non-Windows platform, you must change the paths in the Configuration section of the AP_VirtualTable_Updater.xml file before running this script.

1. Verify the CSV files exist and reside in the path you set for **inputpath** in the **AP_VirtualTable_Updater.xml file**. For example, the **[*drive:*]\inserver6\temp\ap\import** directory. For more information, refer to the "Virtual Tables CSV Files" section in the *Perceptive AP Invoice eForm Supplemental Guide*.

   Note In an active-active server environment, set **inputpath** to a directory on the shared drive.

2. On the ImageNow Server computer, start **INTool** by accessing a command prompt and changing directories to **[*drive:*]\inserver6\bin**.

   Note If you use a 64-bit operating system, access INTool at **[*drive:*]\inserver6\bin64**.

3. Enter the following command:

   ```
   intool --cmd run-iscript --file AP_VirtualTable_Updater.js
   ```

4. After the command completes, verify that it was successful:

   1. Navigate to the **[*drive:*]\inserver6\log** directory and open the **AP_VirtualTable_Updater_[*date*].log** file in a text editor.

      Note In an active-active server environment, navigate to the **[*drive:*]\inserver6\log** directory on your primary node.

   2. Verify that lines similar to the following lines appear at the end of the file:

      ```
      03/10 08:55:54.729 AP_VirtualTable_Updater:0B [ NOTIFY ] Done:

      *************************************************
          2836     C:\inserver6\temp\ap\import\Lawson PO Lines.csv - ADD
             2     C:\inserver6\temp\ap\import\Lawson PO Lines.csv - CHANGE
          2838     C:\inserver6\temp\ap\import\Lawson PO Lines.csv - TOTAL
          2836     TOTAL - ADD
             2     TOTAL - CHANGE
          2838     TOTAL RECORDS


      Script run time 103 Seconds
      *************************************************

      03/10 08:55:54.729 AP_VirtualTable_Updater:0B [  INFO  ]
      03/10 08:55:54.729 AP_VirtualTable_Updater:0B [  INFO  ] Script run time:  1m
      43s (103 total seconds)
      ```

Update virtual table and drawer privileges

To allow your users necessary access to the AP Invoice eForm virtual tables and ImageNow drawer, grant the appropriate privileges in Management Console.

To grant access to the virtual tables, apply the Use privilege for each virtual table project or folder. In ImageNow versions 6.5.1 to 6.6.x, grant the Use privilege to users or groups at the Project level. In ImageNow version 6.7.x, grant the Use privilege to users or groups at the Folder Type level.

To grant access to the Z_APW_VirtualTables drawer, apply the Search privilege.

To assign these privileges to a group, complete the following steps.

1. In **Management Console**, in the left pane, click **Groups**.

2. Optional. To search for a group, in the right pane, on the **Security** tab, in the **Search for groups** box, type some or all of a user name, and then click **Search**.

3. In the **Select a group** list, click the appropriate group > **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 the letter **Z**.

    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.

6. To save the security settings and exit the dialog box, click **OK**.

Note You can also set virtual table privileges at the user, rather than group, level. To do so, in **Management Console** click **Users** and follow the same steps.

Configure workflow for Accounts Payable Invoice eForm

After installing Accounts Payable Invoice eForm installation, you must configure the form to work with your existing AP workflow process.

If you do not have an error queue defined in your workflow process, you must add one. Workflow uses this queue to route invoices with errors other than simple validation errors from the AP workflow process.

You must add the Accounts Payable Invoice eForm to every workflow queue that plays one of the following roles:

- Invoice Entry

- Invoice Processing

- Invoice Approval

If you use Intelligent Capture in conjunction with your AP Invoice eForm implementation, you do not use the Invoice Entry role. For more information, refer to the *Perceptive AP Invoice eForm Supplemental Guide*.

Create a custom view definition

In ImageNow versions 6.5.1 to 6.6.x, you create a view definition at the Project level.

In ImageNow version 6.7.x, you create a view definition at the Folder level.

To create a 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 **A_ZPW All Projects**. In the **Description** box, type the description of the view that will appear in the **ToolTip** for the view. Click **OK**.

   Note The default value for `<viewname>` is Z_APW All Projects in versions 6.5.1 to 6.6.x, or Z_APW All Folders in ImageNow version 6.7.x. You can customize this value, but it must match a valid view name.

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. **Save** and **close** View Designer. In the **View Designer** confirmation box, click **Yes** to activate the view.

Add value added tax (VAT) to the eForm

To incorporate VAT fields and functionality into the AP Invoice eForm, refer to the "Configure value added tax (VAT) with the eForm" section in the *Perceptive AP Invoice eForm Supplemental Guide 10.4.x*.

Modify the AP Invoice eForm Configuration Files

When you install the eForm solution on your ImageNow Server, the installer places several types of files on your computer. These files include XSL, XML, iScript, CSS, and graphics, as well as other types of files. Do not modify the installed Presentation, Data Definition, or the iScript files. Modifying these files can cause an upgrade of this solution to fail. This section assumes you have a working programming knowledge of ImageNow forms, JavaScript, and iScript.

The XML configuration files allow you to adjust the style, formatting, and other elements of your form. For example, you can edit the AP_Custom_Cultures.xml file to make culture-specific customizations to your AP Invoice eForm. The Accounts Payable Invoice eForm file directories section references these files in detail in table format.

Some files require modification or contain optional configuration elements. For example, if you are running your ImageNow Server on a drive other than C:\ or on a non-Windows platform, you need to adjust the path statements in some of the files, as outlined in the "About the virtual table updater configuration file" section.

AP_VirtualTable_Updater.xml

The AP_VirtualTable_Updater.xml file includes a configuration section at the beginning of the file that requires you to tailor paths, as shown below. Adjust your configuration section prior to using this script to update your virtual tables with the business application data from the CSV files.

In an active-active server environment, configure the section to point to the shared path.

```
<configuration host="lawson" inputpath="C:\inserver6\temp\ap\import\*.csv"
containsheaderline="true" archivepath="C:\inserver6\temp\ap\archive"
errorpath="C:\inserver6\temp\ap\error">
```

AP_Export.xml

The AP_Export.xml file includes a configuration section at the beginning of the file that requires you to tailor paths, as shown below. In an active-active server environment, configure the section to point to the shared path.

```
<configuration errorqueue="APO Error" stampexported="true" update_po_table="true"
routeforward="true" nextqueue=""
outputdir="C:/inserver6/temp/ap/export">
```

Use the following guidelines when modifying this file:

- Do not use apostrophes or single quotes; use double quotes instead.

- Be wary of any foreign language characters and their impact when used for element values.

- Save your changes often while editing a file.

- Test changes to your XML files by opening the file in Internet Explorer. If the file does not open in Internet Explorer, make corrections to the files and re-test them.

- All element values must be lowercase.

AP_Skin.xml

If you make any configuration changes to the AP_Skin.xml file, you must complete the following actions to re-populate the AP_SkinCache.js file:

1. On the ImageNow Server computer, start **INTool** by accessing a command prompt and changing directories to [*drive:*]\inserver6\bin.

   Note If you use a 64-bit operating system, access INTool at [*drive:*]\inserver6\bin64.

2. Enter the following command:

```
intool --cmd run-iscript --file AP_Maintenance.js
```

AP_Custom_Cultures.xml

You can configure your AP Invoice eForm to display text in different languages. The AP_Custom_Cultures.xml file allows you to make culture-specific customizations to your AP Invoice eForm so that different global audiences can understand it. For example, you can update this file to customize label captions, error messages, date formats and currency formats.

If you make any configuration changes to the AP_Custom_Cultures.xml file, you must complete the following actions to re-populate the AP_SkinCache.js file:

1. On the ImageNow Server computer, start **INTool** by accessing a command prompt and changing directories to [*drive:*]\inserver6\bin.

   Note If you use a 64-bit operating system, access INTool at [*drive:*]\inserver6\bin64.

2. Enter the following command:

   ```
   intool --cmd run-iscript --file AP_Maintenance.js
   ```

Configure AP Invoice eForm for a global environment

By default, AP Invoice eForm uses the language of the locale specified at the operating system level of the client computer. For more detailed information on ImageNow and planning for a global environment, refer to the *Language Pack Getting Started Guide*.

Configure language, date, and currency settings

Complete the following steps if you want to override your Windows regional settings and set the language so that all users see the same language:

1. Navigate to [*drive:*]\inserver6\etc\ap and open **AP_Skin.xml** with a text editor.

   Note If working in an active-active server environment, navigate to the [*shared path*]\inserver6\etc\ap directory.

2. For **<defaultlanguage>**, complete one of the following substeps:

   - To display the appropriate language in your AP Invoice eForm according to your locality, type the two-character language code for one of the following supported languages:

     - For Dutch, type **nl**.

     - For English, type **en**.

     - For French, type **fr**.

     - For German, type **de**.

     - For Portuguese, type **pt**.

     - For Spanish, type **es**.

     In the example below, the language is set to English.

     ```
     <defaultlanguage>en</defaultlanguage>
     ```

   - To refine the language based on a specific country and to display the date, number, percentage and currency format in your AP Invoice eForm according to that locale, type the appropriate four-character language-country code for one of the following supported countries:

     - For Dutch-Belgium, type **nl-BE** or for Dutch-Netherlands, type **nl-NL**.

     - For English-Australia, type **en-AU**, for English-Canada, type **en-CA**, for English-Great Britain, type **en-GB**, for English-India, type **es-IN**, or for English- United States, type **en-US**.

     - For French-Belgium, type **fr-BE**, for French-France, type **fr-FR**, and for French-Switzerland, type **fr-CH**.

     - For German-Germany, type **de-DE** or for German-Switzerland, type **de-CH**.

     - For Portuguese-Brazil, type **pt-BR**.

- For Spanish-Argentina, type **es-AR**, for Spanish-Mexico, type **ex-MX** or for Spanish-Spain, type **es-ES**.

In the example below, the language is set to French, and the country is set to Belgium.

```
<defaultlanguage>fr-BE</defaultlanguage>
```

Note For more information on supported languages, with the associated language and country codes, refer to the *Perceptive AP Invoice eForm Supplemental Guide*.

3. Save and close **AP_Skin.xml**.

Custom configuration

To make a culture-specific customization to your AP Invoice eForm, complete the following steps.

1. Navigate to [*drive:*]\inserver6\etc\ap and open **AP_Custom_Cultures.xml** with a text editor.

   Note If working in an active-active server environment, navigate to the [*shared path*]\inserver6\etc\ap directory.

2. For **<culture>**, configure the following attributes:

   - For the **name** attribute, type a unique name to identify the specific language and country for which you are customizing the form.

   - For the **base** attribute, type the language code or the language code and country code from which culture inherits the properties, in one of the following formats: *<language code>* or *<language code>-<country/region code>*.

     Note For more information on language and country codes, refer to the *Perceptive AP Invoice eForm Supplemental Guide.*

   - For the **language** attribute, type the top level, more general culture code, in the following format: *<language code>*.

3. For **<numberFormat>** configure the following attributes:

   - For **groupseparator**, type the appropriate separator you want to use to separate number groupings, such as comma (,), period (.), space (ns), or apostrophe (').

   - For **decimalseparator**, type the appropriate separator you want to use to separate the integer part of the number and the decimal part, such as comma (,) or period (.).

   - For **groupsizes**, type the appropriate value of the number grouping size, such as 3,2 grouping.

4. For **<calendar>**, configure the following attributes:

   - For **separator**, type the appropriate separator you want to use to separate the day, month, and year values of the date string, such as forward slash (/), hyphen (-), or period(.).

5. For **<patterns>**, configure the following attributes:

   - For **shortinput**, type the appropriate short date format without separators you want to use to format your dates, such as MMddyy.

   - For **longinput**, type the appropriate long date format without separators you want to use to format your dates, such as MMddyyyy.

   - For **display**, type the appropriate short date format with separators you want to use to format your dates, such as MM/dd/yyyy.

6. For **<messages>**, configure the following attributes:

- For **key**, type the predefined key or custom key for which you want to configure.
- For **caption**, type the literal text replacement for the above key.

7. Complete the above steps for each culture specific region you want to customize to your form.

8. Save and close **AP_Custom_Cultures.xml**.

Schedule scripts to run

We highly recommend adding a task with Windows Task Scheduler or Scheduled Tasks to run your 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

Complete the following steps if you are using Windows Server 2003:

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**.

Complete the following steps if you are using Windows Server 2008:

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**.