MFSQL Connector ScanCapture – Ancora OEM installation guide

# Revision

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| Date | Revised by | Purpose |
| 2017-2-10 | LC | Create document |
| 2017-02-27 | LC | Add upgrade, Add Ancora installation |
| 2017-05-16 | LC | Change document to align with release of new Ancora software |

# Introduction

This product is configured to be used by AncoraDocs Online 2.7 and above.

This document describes to installation of MFSQL Connector using a step by step manual process.

The deployment of the Connector using Advanced Installer is being developed and will replace the manual install method.

# Package Content

The installation package has the following components:

1. MFSQL Connector Data Exchange Installation
2. Ancora Installation – to create table in Connector database
3. Vault Configuration
4. ScanCapture configurator

Note that the installation must take place in the sequence as highlighted in this document.

# MFSQL Connector Installation

The first step in the process is to install the MFSQL Connector pacakges. The following package need to be installed.

* Connector Core select option Data Exchange.

The latest version of the installation package can be downloaded from: <http://lamininsolutions.com/what-we-do/products/mfsql-connector/download-mfsql-connector/>

A serial number is required for installation. A batch of serial numbers will be issued to Ancora for installation. Accounting for the issued serial numbers are defined in the OEM Agreement.

On installation of the package, select ONLY the module: DATA EXCHANGE.

The Data Exchange option includes all the code components for the operations of the MFSQL Connector for Scan Capture.

The following packages are also not required for ScanCapture. All these modules can be installed if the customer purchased the additional modules.

1. The Developer option of the MFSQL Connector Core is not required.
2. MFSQL Context Menu is not required
3. MFSQL manager is not required.

Further instructions for installing the Connector Core package is at this [link](https://lamininsolutions.atlassian.net/wiki/display/MFSQL/Installation%2C+Upgrades+and+Patches#Installation,UpgradesandPatches-InstallingMFSQLConnector)

# Ancora Installation (New Software only)

The Ancora Installation should be completed before MFSQL Connector is installed. This is to allow for assessment of the business requirements for the scanning and recognition of specific elements of the invoice. All the properties that will be captured using Ancora should be defined.

The export database is set to MFSQL Connector Database for the target vault.

The export table name is set the ‘dbo.Ancora\_Invoices’

Changes to the Ancora scanned properties must be implemented following the section on ‘Making Changes to Properties’.

# Vault configuration

The vault configuration package ScanCapture\_ContentPackage.zip contains the content package to be imported into your vault using M-Files Once Off Replication Import.

This import can be done either into an existing vault, or into a new blank vault.

Follow these steps.

1. Unzip the ScanCapture\_ContentPackage.zip to a location on the M-Files Server.
2. Open M-Files Administrator.
3. Select the Target Vault.
4. Select Content Replication and Archiving
5. Select One-time Import
6. On Package Location tab: Select folder in field ‘Index file on server’. Navigate to location of ScanCapture\_ContentPackage and then into folders. Find the file Index.xml. Select the index file and click on Open.
7. Select OK.
8. This will produce a listing of objects to be imported.
9. Select OK.

This configuration will Update/Insert objects for: Invoice Header, Invoice Line Items, Vendor, Vendor and Invoice document. The insert includes object types, classes, properties, valuelists and workflows with states.

Note that the mapping between Ancora export field definition and M-Files make use of Aliases. It is therefore vital to set the aliases to match. Spaces in Ancora field names to be replaced by ‘\_’. Ancora aliases should be added to the property aliase. Use comma as a separator.

# ScanCapture Configurator

This package installs the SQL procedures and scripts to apply vault configuration to Ancora export table and enables the creation of the objects in M-Files

In also includes the installation of FolderWatcher. FolderWatcher is a M-Files utility that allows to push images into M-Files.

# FolderWatcher

The FolderWatcher utility is a standard M-Files utility.

The Package include:

1. The Folderwatcher executable
2. Example bat file
3. Example settings file

The following changes must be made in the settings file

1. Point the watch folder to the folder where Ancora saves the image
2. Update the vault access settings
3. Update the properties to use the correct ID’s

# Changes and upgrades

## Making changes to the scanned properties

Follow the steps below in the event of changes to the properties that Ancora captures from invoice.

The following is regarded as a change:

1. Adding new scanned properties for either the invoice header or invoice line items
2. Change the naming convention of any of the scanned properties
3. Changing the naming convention of any of the M-Files properties that relate to the Ancora Capture process

Re-run the ETL procedure

## Upgrading M-Files

MFSQL Connector Core must be updated in the event of an upgrade of M-Files.

This procedure must be followed after M-Files server and the M-Files client on the SQL Server have been upgraded.

Execute the following procedure in SSMS to update MFSQL Connector with the latest release of M-Files.

## Upgrade / Fixes of MFSQL Connector

The ScanCapture OEM package is an integral part of MFSQL Connector Core. Changes / updates / fixes to the core may impact on the ScanCapture OEM Package

When these upgrades take place customers will be notified and each upgrade will have instructions regarding the procedure to follow for the upgrade as it may impact on different sub modules.