Kofax MarkView

Release Notes for Oracle E-Business Suite
Version: 9.1.1

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KOFAX

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About this release

The release notes document contains late-breaking information about Kofax MarkView for Oracle E-Business Suite. Please read this document carefully, as it contains information that is not available in other documentation.

Version information

Kofax MarkView 9.1.1 R2 is identified by build number 9.1.1.0.67531. You can verify the build number as follows:

1. In `<distribution_directory>`, open `build-number.txt`, where <distribution_directory> is the location where you downloaded and extracted the MarkView installation files.

2. Verify that the version number is 9.1.1, and the build number is 67531.

Install this service pack to take advantage of enhancements made to the product since Kofax MarkView 9.1.1.0.67017 was released. For details about the enhancements and fixes, see the next section, "Content changes."

Content changes

This section lists changes that were made to the Kofax MarkView 9.1.1 release notes since they were initially published on December 8, 2017.

The "Reintegrate _CUSTOM packages" section was added to the Apply the service pack chapter.

The following items were added to the Resolved issues chapter:
- 1107978
- 1104209
- 1097256

System requirements

The primary source of information about Kofax MarkView requirements and dependencies is the *Technical Specifications* document, which is available on the Kofax website. The document is updated regularly, and we recommend that you review it carefully to ensure success with your Kofax MarkView product.

Oracle patches

Oracle Accounts Payable processing requires Oracle patch 20725445:R12.AP.

If you plan to use the WebLogic 12.2 application server, apply Oracle patches 21043834 and 19028811 on WebLogic.

See the Oracle website for more information.

New features

AUSS interface update

Kofax MarkView 9.1.1 uses HTML5 corporate standard for web applications involving the update and redesign of the Automated User Setup and Synchronization (AUSS) Administrator user interface.

The updated AUSS version adds the following new features and options:
- Synchronize one user: Use this option to manually synchronize a specified user. You can only synchronize one user at a time.
- Reset configuration: Use this option to return the AUSS default settings. MarkView AUSS will only keep the Journal and System Statistics information.

  Before you click "Reset configuration", verify that you backed up your current AUSS configuration.
- Journal: The Journal tab displays the synchronization history and change tracking.

For information about configuring and using AUSS, see the *Kofax MarkView Administrator's Guide, Volume 1*.

Import/Receive PDF files

With this feature, MarkView can receive PDF files when Kofax Capture/Kofax Transformation Modules (KC/KTM) and Kofax Invoice Processing Agility will be able to export PDF files to MarkView. In addition to accepting the incoming invoice files in the PDF format, MarkView is able to split and combine the incoming PDF files if necessary.

MarkView can import PDF files from the disk storage via MarkView Import Server.

Support for Blanket PO

With this feature, MarkView can import invoice lines against specific Blanket PO Releases. In MarkView and Kofax Capture/Kofax Transformation Modules, you can manually match invoice lines to Blanket PO Release lines and Receipts against Release lines.

Kofax Transformation Modules does not support auto-matching against Blanket PO Releases and Shipments. Also, MarkView does not support Shipments.

Support for SAML

Kofax MarkView authentication feature includes Single Sign-On (SSO) implementation based on passing user credentials to MarkView by the Security Assertion Markup Language standard (SAML). Kofax recommends that you use SAML to enable SSO in MarkView.

Kofax MarkView 9.1.1 adds a new tab **MarkView SAML Service Providers Metadata** to **Administration** > **Authentication Configuration**.

For information about configuring and using SAML, see the *Kofax MarkView Administrator's Guide, Volume 2*.

Support for WebLogic 12.2

Kofax MarkView 9.1.1 supports WebLogic Server 12.2.

Chapter 2

Apply the service pack

This chapter describes how to apply Kofax MarkView 9.1.1.

Once your system has a minimum of Kofax MarkView 9.1.0 installed and configured, follow the instructions in these release notes to apply the service pack. Have your completed installation worksheet available.

Before you start

This section describes the steps that you must follow before applying the service pack.

Download and decompress distribution files

Your Kofax representative will give you the location from which to download the compressed MarkView system setup files.

1. Log in to the application server host operating system as the application server owner.
2. Create a temporary distribution directory for the compressed MarkView installer and verification files. For example, `<home_directory>/mvdist` where `<home_directory>` is the user home directory.
3. In the distribution directory, create the following subdirectories:
   - `<distribution_directory>/verify`
   - `<distribution_directory>/installer`

   Where `<distribution_directory>` is the name of the directory you just created.
4. Download KofaxMarkView-9.1.1_Oracle_Verify.zip into the verify directory.
5. Download KofaxMarkView-9.1.1_Oracle.zip into the installer directory.
6. Extract the files.

   Note The built-in ZIP utilities in certain versions of Windows, have issues with lengthy directory paths. Use a third-party extraction utility if your directory paths are more than 200 characters long.

Back up your MarkView schema

Before you apply the service pack, back up your MarkView schema. See the *Kofax MarkView 9.1.1 Administrator's Guide, Volume 1*, "Maintaining the System "for information about backup strategies.

End MarkView components in process

Stop all MarkView components, unless needed when you apply the service pack, including all Capture and Output services, as well as Capture and Kofax Transformation Modules services.

Delete MarkView synonyms for Advisor (Oracle EBS 12.2 only)

If MarkView AP Advisor was never installed on your system and you integrate MarkView with Oracle E-Business Suite 12.1 or earlier, skip this section.

Follow the steps in this section even if you deleted the MarkView synonyms for Advisor when you upgraded to MarkView 9.1.0.

1. Log in as the MarkView database user.
2. Navigate to `<distribution_directory>\installer\scripts`, where `<distribution_directory>` is the location where you downloaded and decompressed the installation files.
3. Run synonym_drop_in_all_editions.sql and when prompted, enter the MarkView schema username and MarkView database logging directory name.

   The synonym_drop_in_all_editions.sql script creates synonym_drop_in_all_editions_autogen.sql in the MarkView database logging directory.
4. Log in to the MarkView database as SYSDBA.
5. Navigate to the MarkView database logging directory and run synonym_drop_in_all_editions_autogen.sql to drop synonyms that connect the MarkView and Advisor user schemas in database editions.

   Do not modify this script.

Back up _CUSTOM packages

The _CUSTOM packages contain functionality and scripting that is unique to an installation of MarkView database objects.

Back up all _CUSTOM packages and store a copy of the SQL script files that create the current version of your _CUSTOM packages.

To extract the current version of your _CUSTOM packages from the database, use the tool associated with Extracting custom package bodies from your MarkView schema.

See the *Kofax MarkView 9.1.1 Administrator's Guide, Volume 2* for more information about _CUSTOM packages.

Back up the Kofax Transformation Modules project and batch classes

If your system includes Kofax Transformation Modules, copy your customized Kofax Transformation Modules project files and batch classes to a safe location before you apply this service pack. When you apply this service pack, MarkView automatically installs a new Kofax Transformation Modules project in `C:\KTM\Markview`.

After you apply this service pack, refer to your customized Kofax Transformation Modules project files and batch classes, manually edit the new Kofax Transformation Modules project files and batch classes, and save them in your runtime directory, for example `C:\KTM\Markview\MyProject`.

Back up XSLT files

If you have any customizations of the following XSLT files used by MVImportAPIConfig, back up these XSLT files:

- KofaxCapture82Generic.xslt
- KofaxCapture82ImportServer.xslt
- KofaxCapture82Parse.xslt

Upgrade Kofax Transformation Modules

If you plan to upgrade Kofax Transformation Modules, do it before applying the service pack. Follow the instructions in the *Kofax Transformation Modules Upgrade Guide*.

Getting ready to run the installer

Before running the installer, verify that your application server is running. For information about the application server configuration, see the Kofax MarkView 9.1.0 installation or upgrade guides.

The JAR file modification (for WebLogic 12.2 only)

If you use MarkView with WebLogic Server 12.2, locate `<installation_directory>/Oracle/Middleware/Oracle_Home/wlserver/modules/com.oracle.weblogic.security.opensaml2.jar`, where `<installation_directory>` is the location where you installed WebLogic Server 12.2 and remove the file or change the file extension.

This JAR file modification is required even if you are not using SAML.

JBoss EAP additional configuration

If you use MarkView with JBoss EAP, you must perform the following configuration:

1. Make a backup copy of `JBOSS_HOME\bin\jboss-cli.xml`.
   Open jboss-cli.xml for editing, locate and change the following string and save the changes.
   From:
   `<jboss-cli xmlns="urn:jboss:cli:1.3">`
   To:
   `<jboss-cli xmlns="urn:jboss:cli:2.0">`

   Note After you apply the service pack, you must restore jboss-cli.xml.

2. Modify the following scripts depending on the installation type and your operating system:
   - install.sh or install.bat
   - install_silent.sh or install_silent.bat

- verify.sh or verify.bat
- verify_silent.sh or verify_silent.bat

You must open the required file for editing and add the `Dmarkview.jboss.protocol` parameter.
For example, change:

```
java -Xmx1024m -cp ${CLASSPATH} -Doracle_home=${ORACLE_HOME}
com.markview.installer.Installer "$@"
```

to:

```
java -Xmx1024m -cp ${CLASSPATH} -Doracle_home=${ORACLE_HOME} -
Dmarkview.jboss.protocol=remoting com.markview.installer.Installer "$@"
```

Verify the Target Registry Service

After MarkView version 9.1.0 is installed, the Target Registry Service (TRS) stores information such as module versions in the MarkView database. The TRS URL is an entry on the installation worksheet. For example, `http://<application server host>:<port>/mvastrs/markview` where <application server host> and <port> are the pre-upgrade host name and port number. When you upgrade, the TRS must be running to provide this information to the installer.

- If you are upgrading and installing a new application server, leave the TRS on the existing application server running. After you upgrade, shut down the old application server.

  To verify that the TRS is running, open your browser and enter the URL. If the TRS is running, the MarkView TRS web page appears. If the browser cannot find the page, the TRS is not running. If necessary, restart the TRS.

- If you are upgrading and your old application server is not available, manually deploy the TRS in the new application server, and then run the installer.

Start the Target Registry Service on the application server

WebLogic

1. Log in to the application server Admin Console and navigate to **Deployment**.
2. Locate and verify that the mvastrs status is **Active**.
3. If the status is not **Active**, select the application and click **Start**.

WildFly or JBoss EAP

1. Log in to the application server Admin Console and navigate to **Deployments**.
2. Locate and verify that the mvastrs status is **Enabled**.
3. If the status is not **Enabled**, select **mvastrs** and click **Enable**.

Install MarkView

Before you run the MarkView installer, run verify on all systems where MarkView products are being upgraded:

- Application server hosts
- Oracle E-Business Suite hosts

- Capture and Output Server hosts for:
  - Fax Server
  - Bar Code Server
  - Mail Gateway Server
  - MarkView Data Export Server
  - Kofax Capture Server

Verify checks the following:

- Version information for
  - Operating System
  - Database
  - Database Server
  - Application Server
  - Forms Server
- MarkView Oracle RDBMS user privileges
- Oracle XML DB
- Oracle Advanced Queuing
- MarkView schema user setup

Verify generates logs that contain information about issues that can cause the process to fail.

Have your completed MarkView Installation Worksheet available for reference and select the type of installation to perform:

- To use the silent-mode installation, see Silent-mode installation.
- To use the installer application interface, see Run the MarkView installer.

Silent-mode installation

In silent-mode installation, you set installation properties in a script, which the installer reads. The installer does not prompt for input during the installation process. Because you can reuse the install_silent script, it can automate identical installations on multiple systems.

Edit the preliminary_interview.properties file

1. Navigate to `<distribution_directory>/installer/conf` where `<distribution_directory>` is the location where you downloaded and decompressed the installation files.
2. Back up the preliminary_interview.properties file.
3. Open the preliminary_interview.properties file and enter the following information.

> **Note** For installations running on Windows, when modifying manually populated fields, use a double backslash (\\) or a forward slash (/) as a path delimiter.

Field	Allowed Values
AppServerType. app_server_type	• WebLogic • JBoss (use for WildFly and JBoss EAP)
InstallDirectory. install_directory	Installation directory. This is user-defined and must exist prior to applying the service pack. This cannot be the same as the temporary distribution directory. See the *MarkView Installation Worksheet.*
InstallerAction. installer_action	upgrade
InstallationType. installation_type	• Standard Full Install: Select this option the first time you apply the service pack. This option installs the application server components and database objects. • Partial Install: Select this option if you already applied the service pack and need to reinstall application server components. This option installs only the application server components.
SelectedProducts. selected_products	These must exactly match what appears in the install_script.xml file. To verify product names, open install_script.xml and search for display = <product name>. For example: • MarkView for AP 9.1.1 with Transformation • MarkView for Expense Management 9.1.1 • MarkView Document Library 9.1.1 • MarkView Self Service Invoice 9.1.1 To list multiple products, separate product names with commas.
ERPType.erp_type	(Optional) Oracle or blank

Run the generateInterviewTemplate file

The generateInterviewTemplate script uses the information in the preliminary_interview.properties file to generate the installer_interview.properties file.

1. Navigate to `<distribution_directory>\installer\bin`, where `<distribution_directory>` is the location where you downloaded and decompressed the installation files.
2. Run either:
   • UNIX: generateInterviewTemplate.sh
   • Windows: generateInterviewTemplate.bat

Edit the installer_interview.properties File

1. Navigate to `<distribution_directory>\installer\conf` where `<distribution_directory>` is the location where you downloaded and decompressed the installation files.
2. Back up the installer_interview.properties file.
3. Open the installer_interview.properties file.

4. Enter information for the fields identified with **bold** type in the following table. These fields appear in the same alphabetical order in the installer_interview.properties file. Use this list as a reference for all possible fields in the installer_interview.properties file. Your file may not contain all of the listed fields. Field names and values cannot contain spaces.

> **Note** Modifying automatically populated fields may cause unexpected results while applying the service pack.
>
> Also, for installations running on Windows, when modifying manually populated fields, use a double backslash (\\) or a forward slash (/) as a path delimiter.

Field	Values	Source	Product
AppServer Type. app _server_type	• WebLogic • JBoss (use for WildFly and JBoss EAP)	Automatically populated. Do not change this value.	All
AppServerType. type	SimpleQuestion	Automatically populated. Do not change this value.	All
Documentum Integration. enabled	Valid values are N or Y.	Automatically populated. Do not change this value.	AP
Documentum Integration .type	Documentum Integration	Automatically populated. Do not change this value.	AP
Folder Location. location	Directory for the Document Server. Must exist prior to applying the service pack.	Enter the data from your Installation Worksheet.	AP
FolderLocation. type	FolderLocation	Automatically populated. Do not change this value.	AP
InstallDirectory. install _directory	From the preliminary _interview. properties file	Automatically populated. Do not change this value.	All
InstallDirectory. type	SimpleQuestion	Automatically populated. Do not change this value.	All
InstallationType. installation _type	From the preliminary _interview. properties file	Automatically populated. Do not change this value.	All

Field	Values	Source	Product
InstallationType. type	SimpleQuestion	Automatically populated. Do not change this value.	All
JBossAppServer. adminUserName	JBoss administrator name	Enter the data from your Installation Worksheet.	All
JBossAppServer. adminPassword	JBoss application server administrator password	Enter the data from your Installation Worksheet.	All
JBossAppServer. adminPort	The admin HTTP port (for example, 9090)	To change the default value, enter the data from your Installation Worksheet.	All
JBossAppServer.asSSL	For SSL with WildFly or JBoss EAP: true Valid values: true, false	Enter the data from your Installation Worksheet.	All
JBossAppServer.domain	For domain mode, enter your domain name as follows: `JBossAppServer.domain=<domainName>` For standalone mode, leave the field value blank: `JBossAppServer.domain=`	For domain mode, enter the data from your Installation Worksheet.	All
JBossAppServer. host	Fully qualified hostname of this machine	Enter the data from your Installation Worksheet.	All
JBossAppServer. port	The HTTP port where MarkView applications listen (for example, 26000)	To change the default value, enter the data from your Installation Worksheet.	All
JBossAppServer. type	JBossAppServer	Automatically populated. Do not change this value.	All

Field	Values	Source	Product
JBossAppServer. jbossLocation	Defaults to `<distribution_directory>/../ wildfly`, where `<distribution_directory>` is the location where you downloaded and extracted the MarkView installation files. If `<distribution_directory>/../ wildfly` does not exist prior to applying the service pack, the installer creates the directory.	To change the default value, enter the data from your Installation Worksheet.	All
JBossAppServer. oracleDriver	Defaults to `<distribution_directory>/distr/ ojdbc6-11.2.0.3.jar`, where `<distribution_directory>` is the location where you downloaded and extracted the MarkView installation files.	To change the default value, enter the data from your Installation Worksheet.	All
JBossAppServer. needsDeploy	Defaults to <empty> Valid values: no, yes	To change the default value, enter the data from your Installation Worksheet.	All
MarkView DBConn. dbType	oracle	Automatically populated. Do not change this value.	All
MarkView DBConn. host	Fully qualified hostname where MarkView resides	Enter the data from your Installation Worksheet.	All
MarkView DBConn. indexspace	Tablespace for MarkView indexes	Enter the data from your Installation Worksheet.	All
MarkView DBConn. loggingDirectory	Oracle logging directory for MarkView processes	Enter the data from your Installation Worksheet.	All
MarkView DBConn. password	Password for MarkView schema user	Enter the data from your Installation Worksheet.	All
MarkView DBConn. port	Port for MarkView schema	Enter the data from your Installation Worksheet.	All

Field	Values	Source	Product
MarkView DBConn. sid	SID for MarkView schema	Enter the data from your Installation Worksheet.	All
MarkView DBConn. tablespace	Tablespace for MarkView data	Enter the data from your Installation Worksheet.	All
MarkView DBConn. type	OracleDatabase Connection	Enter the data from your Installation Worksheet.	All
MarkView DBConn. user	Username for the MarkView schema user	Enter the data from your Installation Worksheet.	All
OracleEBS. password	Oracle APPS user password	Enter the data from your Installation Worksheet.	All except Doc Lib
OracleEBS.type	OracleEBSInstance	Automatically populated. Do not change this value.	All except Doc Lib
OracleEBS. user	Oracle APPS username	Enter the data from your Installation Worksheet.	All except Doc Lib
OracleEBSCodes. holdCode	170_SYSTEMS _HOLD	Automatically populated. Do not change this value.	All except Doc Lib
OracleEBSCodes. releaseCode	170_SYSTEMS _RELEASE	Automatically populated. Do not change this value.	All except Doc Lib
OracleEBSCodes. type	OracleEBS Codes	Automatically populated. Do not change this value.	All except Doc Lib
OracleText. password	Oracle Text user password		Doc Lib
OracleText.type	OracleText	Automatically populated. Do not change this value.	Doc Lib
OracleText.user	CTXSYS		Doc Lib

Field	Values	Source	Product
Oracle Text user	Doc Lib		Doc Lib
SelectedProducts. selected_ products	Products selected in the preliminary _interview. properties file	Automatically populated. Do not change this value.	All
Selected Products. type	MultipleAnswer Question	Automatically populated. Do not change this value.	All
SMTPInfo. password	SMTP password, if necessary	Enter the data from your Installation Worksheet.	All
SMTPInfo. serverName	Fully qualified SMTP server address	Enter the data from your Installation Worksheet.	All
SMTPInfo. type	Custom Resource	Automatically populated. Do not change this value.	All
SMTPInfo. username	SMTP username if necessary	Enter the data from your Installation Worksheet.	All
WebLogic AppServer. adminPassword	WebLogic application server password	Enter the data from your Installation Worksheet.	All
WebLogic AppServer. adminPort	The admin HTTP port (default 7001)	Enter the data from your Installation Worksheet.	All
WebLogic AppServer. adminUserName	WebLogic administrator name	Enter the data from your Installation Worksheet.	All
WebLogicAppServer. asSSL	For SSL with WebLogic: true Valid values: true, false	Enter the data from your Installation Worksheet.	All
WebLogic AppServer. domainLocation	Defaults to `${WL_HOME}/../markview`	To change the default value, enter the data from your Installation Worksheet.	All

Field	Values	Source	Product
WebLogic AppServer. domainName	Defaults to MarkView	To change the default value, enter the data from your Installation Worksheet.	All
WebLogic AppServer. host	Fully qualified hostname of this machine	Enter the data from your Installation Worksheet.	All
WebLogic AppServer. jarLocation	Defaults to `${WL_HOME}/server/lib/ weblogic.jar`	To change the default value, enter the data from your Installation Worksheet.	All
WebLogic AppServer. javaHomeDir	Defaults to `%WL_HOME/../jrockit_*`	To change the default value, enter the data from your Installation Worksheet.	All
WebLogic AppServer. nodeManagerPort	Defaults to 5556	To change the default value, enter the data from your Installation Worksheet.	All
WebLogic AppServer.port	The HTTP port where MarkView applications listen (default 8001)	To change the default value, enter the data from your Installation Worksheet.	All
WebLogic AppServer.type	WebLogicAppServer	Automatically populated. Do not change this value.	All

Run the verify_silent script

To ensure that your environment is configured properly to successfully apply the service pack, run the verify script, which is a smaller version of the installation script.

1. Copy the installer_interview.properties file that you generated in Run the generateInterviewTemplate file and edited in Edit the installer_interview.properties File from `<distribution_directory>/ installer/conf` to `<distribution_directory>/verify/conf`, (where `<distribution_directory>` is the location where you downloaded and decompressed the installation files).

2. Ensure that all the paths entered in the install_interview.properties file exist.

3. Skip this step if you do not use SSL for the application server. If you plan to use SSL, navigate to `<distribution_directory>/verify/bin`, (where `<distribution_directory>` is the location where you downloaded and decompressed the installation files), open for editing verify_silent.sh or verify_silent.bat and change the following string:

- For UNIX:

```
java -Xmx1024m -cp ${CLASSPATH}
        -Doracle_home=${ORACLE_HOME} com.markview.installer.Installer "$@"
```

to:

```
java -Xmx1024m -cp ${CLASSPATH}
        -Doracle_home=${ORACLE_HOME} -Dmarkview.ssl.alias=<alias>
        -Djavax.net.ssl.keyStore=<keystore>
        -Djavax.net.ssl.keyStorePassword=<keystorepassword>
        -Djavax.net.ssl.trustStore=<truststore>
        -Djavax.net.ssl.trustStorePassword=<truststorepassword>
        com.markview.installer.Installer "$@"
```

- For Windows:

```
java -Xmx1024m -cp "%CLASSPATH%"
        -Doracle_home=%ORACLE_HOME% com.markview.installer.Installer %*
```

to:

```
java -Xmx1024m -cp "%CLASSPATH%"
        -Doracle_home=%ORACLE_HOME% -Dmarkview.ssl.alias=<alias>
        -Djavax.net.ssl.keyStore=<keystore>
        -Djavax.net.ssl.keyStorePassword=<keystorepassword>
        -Djavax.net.ssl.trustStore=<truststore>
        -Djavax.net.ssl.trustStorePassword=<truststorepassword>
        com.markview.installer.Installer %*
```

4. In `<distribution_directory>/verify/bin`, run either:
- UNIX: verify_silent.sh
- Windows: verify_silent.bat

If no errors occur, verify_silent returns to a command prompt with no further messages.

Run the install_silent script

1. Skip this step if you do not use SSL for the application server. If you plan to use SSL, navigate to `<distribution_directory>/installer/bin`, (where `<distribution_directory>` is the location where you downloaded and decompressed the installation files), open for editing install_silent.sh or install_silent.bat and change the following string:

- For UNIX:

```
java -Xmx1024m -cp ${CLASSPATH}
        -Doracle_home=${ORACLE_HOME} com.markview.installer.Installer "$@"
```

to:

```
java -Xmx1024m -cp ${CLASSPATH}
        -Doracle_home=${ORACLE_HOME} -Dmarkview.ssl.alias=<alias>
        -Djavax.net.ssl.keyStore=<keystore>
```

```
              -Djavax.net.ssl.keyStorePassword=<keystorepassword>
              -Djavax.net.ssl.trustStore=<truststore>
              -Djavax.net.ssl.trustStorePassword=<truststorepassword>
              com.markview.installer.Installer "$@"
```

- For Windows:

```
java -Xmx1024m -cp "%CLASSPATH%"
       -Doracle_home=%ORACLE_HOME% com.markview.installer.Installer %*
```

to:

```
java -Xmx1024m -cp "%CLASSPATH%"
       -Doracle_home=%ORACLE_HOME% -Dmarkview.ssl.alias=<alias>
       -Djavax.net.ssl.keyStore=<keystore>
       -Djavax.net.ssl.keyStorePassword=<keystorepassword>
       -Djavax.net.ssl.trustStore=<truststore>
       -Djavax.net.ssl.trustStorePassword=<truststorepassword>
       com.markview.installer.Installer %*
```

2. In `<distribution_directory>\installer\bin`, run either:
   - UNIX: install_silent.sh
   - Windows: install_silent.bat

> **Note** If the installer encounters an error, the process stops. Review the log files located in the log folder in the MarkView installation directory. Resolve the issue, and then rerun the install_silent script.

Upon successful completion, the install_silent script returns to the command prompt with no further messages.

Silent-mode setup for Oracle Objects

Copy target_registry_service.properties file from the MarkView installation directory to the Oracle Objects installation directory.

Edit the preliminary_interview.properties file for Oracle Objects

1. Log in to the Oracle EBS server as the EBS user.
2. Navigate to `<distribution_directory>/installer/conf` (where `<distribution_directory>` is the location where you downloaded and decompressed the installation files).
3. Back up the preliminary_interview.properties file.
4. Open the preliminary_interview.properties file and enter the following information.

Field	Allowed Values
AppServerType.app_server_type	• WebLogic • JBoss (use for WildFly and JBoss EAP)
InstallDirectory.install_directory	Installation directory. This is user-defined and must exist prior to installation. See the *MarkView Installation Worksheet.*
InstallerAction.installer_action	upgrade

Field	Allowed Values
InstallationType.installation_type	Standard Full Install
	Partial Install (Any value other than Standard Full Install will perform a partial installation)
SelectedProducts.selected_products	Must be an exact match to contents of the install_script.xml file. To verify product names, open install_script.xml and search for display = <product name>. To list multiple products, separate product names with commas.
ERPType.erp_type	(Optional) Oracle or blank

Run the generateInterviewTemplate file for Oracle Objects

1. Log in to the Oracle EBS server as the EBS user.
2. Navigate to `<distribution_directory>\installer\bin` where `<distribution_directory>` is the location where you downloaded and decompressed the installation files.
3. Run either:
   - UNIX: generateInterviewTemplate.sh
   - Windows: generateInterviewTemplate.bat

Edit the Oracle Objects installer_interview.properties file

1. Log in to the Oracle EBS server as the EBS user.
2. Navigate to the `conf` folder in the MarkView installation directory.
3. Back up the installer_interview.properties file.
4. Open the Oracle Objects installer_interview.properties file.
5. Enter information for the fields marked with **bold** type. There are no spaces in field names.

> **Note** Modifying fields populated by the preliminary_interview.properties file may cause unexpected results while applying the service pack.

Field	Values	Source	Product
InstallDirectory. install_directory	MarkView installation directory from the preliminary_ interview. properties file	preliminary_ interview. properties	All
InstallDirectory. type	Simple Question	preliminary_ interview. properties	All
InstallationType. installation_type	Install type seeded from preliminary_ interview . properties	preliminary_ interview. properties	All
InstallationType . type	SimpleQuestion	preliminary_ interview. properties	All
MarkView DBConn. dbType	Enter **oracle**.	preliminary_ interview. properties	All
MarkView DBConn. host	Fully qualified hostname where MarkView resides	Installation Worksheet	All

Field	Values	Source	Product
MarkView DBConn. indexspace	Tablespace where MarkView indexes will reside	Installation Worksheet	All
MarkView DBConn. logging Directory	Oracle logging directory for MarkView processes	Installation Worksheet	All
MarkView DBConn. password	Password for MarkView schema user	Installation Worksheet	All
MarkView DBConn. port	Port for MarkView schema	Installation Worksheet	All
MarkView DBConn. sid	SID for MarkView schema	Installation Worksheet	All
MarkView DBConn. tablespace	Tablespace where MarkView data will reside	Installation Worksheet	All
MarkView DBConn. type	Oracle Database Connection	Installation Worksheet	All
MarkView DBConn. user	Username for MarkView schema user	Installation Worksheet	All
OAForms EnvInfo. appl_top		install_silent.sh	Forms
OAForms EnvInfo. au_top		install_silent.sh	Forms
OAForms EnvInfo. c_markview_ top		install_silent.sh	Forms
OAForms EnvInfo. fnd_top		install_silent.sh	Forms
OAForms EnvInfo. type		install_silent.sh	Forms
OAFrameworks EnvInfo. appl_top		install_silent.sh	OA Frameworks, OA Expense
OAFrameworks EnvInfo. common_top		install_silent.sh	OA Frameworks, OA Expense
OAFrameworks EnvInfo. java_top		install_silent.sh	OA Frameworks, OA Expense
OAFrameworks EnvInfo. type	OAFramework EnvInfo Resource	install_silent.sh	OA Frameworks, OA Expense
OracleEBS password	Oracle APPS user password	Installation Worksheet	All except Doc Lib
OracleEBS .type	Oracle EBSInstance	preliminary_ interview. properties	All except Doc Lib
OracleEBS. user	Oracle APPS username	Installation Worksheet	All except Doc Lib
Selected Products. selected_products	Products selected from preliminary_ interview. properties	preliminary_ interview. properties	All

Field	Values	Source	Product
Selected Products. type	Multiple Answer Question	preliminary_ interview. properties	All

Run the verify_silent script for Oracle Objects

1. Log in to the Oracle EBS server as the EBS user.
2. Copy the installer_interview.properties file from `<distribution_directory>/installer/conf` to `<distribution_directory>/verify/conf` (where `<distribution_directory>` is the location where you downloaded and decompressed the installation files).
3. Ensure that all the paths entered in the install_interview.properties file exist.
4. In `<distribution_directory>/verify/bin`, run either:
   - UNIX: verify_silent_oracle_objects.sh
   - Windows: verify_silent_oracle_objects.bat

   If no errors exist, verify_silent_oracle_objects returns to a command prompt with no further messages.

Run the install_silent script for Oracle Objects

1. Log in to the Oracle EBS server as the EBS user.
2. If the Target Registry Service is already deployed, copy the existing target_registry_service.properties file to the MarkView installation directory for Oracle Objects.
3. In `<distribution_directory>/installer/bin`, (where `<distribution_directory>` is the location where you downloaded and decompressed the installation files), run either:
   - UNIX: install_silent.sh
   - Windows: install_silent.bat

   Note If the installer encounters an error, the process stops automatically. Review the log files located in the log directory in the target installation directory. Resolve the issue, and then rerun the install_silent script.

If no errors exist, the install_silent file returns to the command prompt with no further messages.

Run the MarkView installer

Use the information that you entered on the *Kofax MarkView Installation Worksheet* to respond to the Verify prompts. Run Verify before running the MarkView installer.

1. Log in to the application server host operating system as the application server owner.
2. Ensure that the MarkView application server is running.
3. Ensure that the environment variables are correct.
4. Skip this step if you do not use SSL for the application server. If you plan to use SSL, navigate to `<distribution_directory>/verify/bin`, (where `<distribution_directory>` is the location

where you downloaded and decompressed the installation files), open for editing verify.sh or verify.bat and change the following string:

- For UNIX:

```
java -Xmx1024m -cp ${CLASSPATH}
     -Doracle_home=${ORACLE_HOME} com.markview.installer.InstallerVerify "$@"
```

to:

```
java -Xmx1024m -cp ${CLASSPATH}
     -Doracle_home=${ORACLE_HOME} -Dmarkview.ssl.alias=<alias>
     -Djavax.net.ssl.keyStore=<keystore>
     -Djavax.net.ssl.keyStorePassword=<keystorepassword>
     -Djavax.net.ssl.trustStore=<truststore>
     -Djavax.net.ssl.trustStorePassword=<truststorepassword>
     com.markview.installer.InstallerVerify "$@"
```

- For Windows:

```
java -Xmx1024m -cp "%CLASSPATH%"
     -Doracle_home=%ORACLE_HOME% com.markview.installer.InstallerVerify %*
```

to:

```
java -Xmx1024m -cp "%CLASSPATH%"
     -Doracle_home=%ORACLE_HOME% -Dmarkview.ssl.alias=<alias>
     -Djavax.net.ssl.keyStore=<keystore>
     -Djavax.net.ssl.keyStorePassword=<keystorepassword>
     -Djavax.net.ssl.trustStore=<truststore>
     -Djavax.net.ssl.trustStorePassword=<truststorepassword>
     com.markview.installer.InstallerVerify %*
```

5. Navigate to `<distribution_directory>/verify/bin`, (where `<distribution_directory>` is the location where you downloaded and decompressed the installation files), and run the command for your operating system:
   - UNIX: verify.sh
   - Windows: verify.bat

6. On the **Which products do you want to verify for this environment?** page, select *only* the products that you plan to upgrade.
   - MarkView for AP with Transformation
   - MarkView for Expense Management
   - MarkView Self Service Invoice

7. Follow the on-screen prompts and click **Verify**.

   Note On the **Installation Progress** window, click **Show Details** to display the progress.

8. If the system prompts you to enter the URL of the Target Registry Service, enter the value from the installation worksheet (for example, `http://<application server host>:<port>/mvastrs/ markview`).
   After Verify finishes running, a confirmation message appears.

9. Review the generated reports located in the MarkView installation directory you selected during the verification. Save these logs in another directory to avoid overwriting them.
   The log file `reports/EnvironmentReport.txt` describes issues with your environment.

10. Make changes as indicated in the failure reports. You are now ready to apply the service pack.

Restart the application server

1. For WebLogic:

   1. Log in to the WebLogic Administration console.

   2. Navigate to **Environments > Servers**, click the **Control** tab and select **markview_server**.

   3. Click **Shutdown** and select **Force Shutdown Now**.

      When you restart markview_server the first time after installing or upgrading applications, not all applications transition to the Active state. At this point, not all applications need to be active.

2. For WildFly or JBoss EAP:

   Skip this section, if you want to use the MarkView installer to install and configure WildFly and proceed to running the MarkView installer.

   If you use manually configured WildFly or JBoss EAP, make sure that the application server is started.

Modify installation scripts (for SSL only)

Skip this section if you are not using SSL for the application server.

1. Navigate to `<distribution_directory>/installer/bin` where `<distribution_directory>` is the location where you downloaded and extracted the installation files, and open for editing:

   • UNIX: install.sh

   • Windows: install.bat

2. Locate and change the string as follows:

   • For UNIX:

   ```
   java -Xmx1024m -cp ${CLASSPATH}
        -Doracle_home=${ORACLE_HOME} com.markview.installer.Installer "$@"
   ```

   to:

   ```
   java -Xmx1024m -cp ${CLASSPATH}
        -Doracle_home=${ORACLE_HOME} -Dmarkview.ssl.alias=<alias>
        -Djavax.net.ssl.keyStore=<keystore>
        -Djavax.net.ssl.keyStorePassword=<keystorepassword>
        -Djavax.net.ssl.trustStore=<truststore>
        -Djavax.net.ssl.trustStorePassword=<truststorepassword>
        com.markview.installer.Installer "$@"
   ```

   • For Windows:

   ```
   java -Xmx1024m -cp "%CLASSPATH%"
        -Doracle_home=%ORACLE_HOME% com.markview.installer.Installer %*
   ```

   to:

   ```
   java -Xmx1024m -cp "%CLASSPATH%"
        -Doracle_home=%ORACLE_HOME% -Dmarkview.ssl.alias=<alias>
        -Djavax.net.ssl.keyStore=<keystore>
        -Djavax.net.ssl.keyStorePassword=<keystorepassword>
        -Djavax.net.ssl.trustStore=<truststore>
        -Djavax.net.ssl.trustStorePassword=<truststorepassword>
   ```

```
         com.markview.installer.Installer %*
```

Where:

- `<alias>` is a keystore attribute that defines the string alias used to store and retrieve the server private key.
- `<keystore>` is a repository that contains private keys and the certificates with the corresponding public keys.
- `<keystorepassword>` is a password of `<keystore>`.
- `<truststore>` is a repository that contains trusted certificates from other parties that it expects to communicate with, or from Certificate Authorities that it trusts to identify other parties.
- `<truststorepassword>` is a password of `<truststore>`.

Run the installation scripts for WebLogic

The installer populates some fields based on entries in the Target Registry Service (TRS) file. (Installing MarkView for Accounts Payable creates the TRS file.) Some information, like passwords, is not saved. Have your completed *Installation Worksheet* available when you start the installer.

1. Log in to the application server host operating system as the application server owner.
2. Verify that the application server is running.
3. Ensure that the environment variables are correct.
4. Navigate to `<distribution_directory>\installer\bin` where `<distribution_directory>` is the location where you downloaded and extracted the installation files, and run the command for your operating system:
   - UNIX: install.sh.
   - Windows: install.bat.
5. On the **Which products do you want to install?** window, select the products to update.
6. Click **Next**.
7. Select **Standard Full Install** and click **Next**.
8. On the **Which type of J2EE application server will MarkView use?** window, select **WebLogic** and click **Next**.
9. Use the installation worksheet to complete the windows as prompted by the installer.
   The windows and prompts that appear vary based on your selections.
10. When prompted, click **Install**.

   Note If you are keeping your existing Application Server, select the same MarkView installation directory where MarkView is installed. See your *Kofax MarkView Installation Worksheet*.

11. Click **Exit** to complete the process.
   The installer finishes with a message indicating whether you successfully applied the service pack.
12. The installer creates a log file in the MarkView installation directory. Save the installation log files in a safe place in case you need this information for Technical Support.

Run the installation scripts for WildFly or JBoss EAP

The installer populates some fields based on entries in the Target Registry Service (TRS) file. (Installing MarkView for Accounts Payable creates the TRS file.) Some information, like passwords, is not saved. Have your completed *Installation Worksheet* available when you start the installer.

1. Log in to the application server host operating system as the application server owner.
2. If you use manually installed WildFly, verify that the application server is running.
3. If you use manually installed WildFly, ensure that the environment variables are correct.
4. Navigate to `<distribution_directory>\installer\bin` where `<distribution_directory>` is the location where you downloaded and extracted the installation files, and run the command for your operating system:
   - UNIX: install.sh.
   - Windows: install.bat.
5. On the **Which products do you want to install?** window, select the products to update.
6. Click **Next**.
7. Select **Standard Full Install** and click **Next**.
8. On the **Which type of J2EE application server will MarkView use?** window, select **WildFly/JBoss** and click **Next**.
9. Use the installation worksheet to complete the windows as prompted by the installer.
   The windows and prompts that appear vary based on your selections.
   - **Admin Username**
   - **Admin User Password**
   - **Domain**

     For the domain mode, enter your domain name in the **Domain** field.

     For the standalone mode, leave the **Domain** field blank.
   - **App Server Directory**

     For manually configured WildFly or JBoss EAP, specify `<JBOSS_HOME>`.

     If you are using the MarkView installer to install and configure WildFly, specify the location to store your WildFly installation files.
   - **Host Name**

     Specify your application server host name.
   - **Admin Port**

     The admin ports for manually configured WildFly and JBoss EAP may differ.
   - **SSL**

     Select the check box if you are using SSL.
   - **HTTP Port**
   - **Install WildFly**

     Select **Install WildFly**, to use the MarkView installer to install and configure the WildFly application server.

     Clear **Install WildFly**, to use the manually installed WildFly.
10. On the installer screen, check the summary of your selections.

> **Note** In the **Application server** field, the value **JBoss** is set.

11. When prompted, click **Install**.

> **Note** If you are keeping your existing Application Server, select the same MarkView installation directory where MarkView is installed. See your *Kofax MarkView Installation Worksheet*.

> **Note** In **Show Details** > **Output**, **Installing or verifying JBoss server...** line indicates the WildFly installation and verification process.

12. Click **Exit** to complete the process.
    The installer finishes with a message indicating whether you successfully applied the service pack.
13. The installer creates a log file in the MarkView installation directory. Save the installation log files in a safe location in case you need them later for Technical Support.

After you apply the service pack

Restart the application server

WebLogic

1. Log in to the WebLogic Administration console.
2. Navigate to **Environments > Servers** and restart **markview_server**.

> **Note** When you restart markview_server the first time after installing or upgrading applications, not all applications transition to the Active state. At this point, not all applications need to be active.

WildFly

If you used the MarkView installer to install and configure WildFly, before starting the application server, configure the memory properties.

1. Set the JBOSS_HOME environmental variable, such as:

   ```
   JBOSS_HOME=<drive&path>/wildfly
   ```
2. Start the WildFly application server in standalone or domain modes. See the JBoss website for more information about the operating modes.

JBoss EAP

1. Restore jboss-cli.xml that you modified in Getting ready to run the installer.
2. Start the JBoss EAP application server in standalone or domain modes.

Reintegrate _CUSTOM packages

There are several changes to the _CUSTOM packages.

If you have not customized your _CUSTOM packages, compile these packages to upgrade them to the current versions.

Compile these custom packages from the distribution directory (`/modules/erp-integration-dist-9.1.1/erp-integration-db/schema/custom_package_bodies/custom_package_bodies_private/`):

• @mverp_dfm_custom_pb.sql
• @mverp_dfm_descr_flex_custom_pb.sql
• @mverp_dfm_lov_custom_pb.sql

If you have customized your _CUSTOM packages, modify and compile your packages before you can test other aspects of the system such as entering invoices into the system, and displaying and marking up these invoices.

See the *Kofax MarkView 9.1.1 Administrator's Guide, Volume 2* for more information about custom packages.

To support Oracle R12, MarkView divides the definition of distribution line into distributions and invoice lines. These custom packages have changed as a result of this division and although the changes are applicable only for Oracle 12, you must edit and recompile these packages for all Oracle and SAP environments.

• **MVERP_DFM_DESCR_FLEX_CUSTOM**: This package has a new function, a new procedure, and a change to an existing procedure:
  • New function, SetContextValueForLine. Derives Descriptive FlexField (DFF) content for an invoice line. This is only applicable for Oracle R12 environments when the DFM is created with the DFM_FIELD_DFF field enabled.
  • New Procedure, PopulateSegmentForLine. Populates DFF segments for a distribution line. This is only applicable for Oracle R12 environments when the DFM is created with the DFM_FIELD_DFF field enabled.
• **MVERP_DFM_CUSTOM**: This package has new procedures and a new function.
  • New function, GetDefaultAccountForLine. Gets the default concatenated account segments whenever the amount is entered on an invoice line and the account has not already been entered. This is only applicable for Oracle R12 environments when the DFM has been created with UseProjects set to FALSE.
  • New procedures, SetLineTypeDefaultsForLine and SetLineTypeDefaults. Set the default values for the Tax fields when the Line Type of an invoice line or a distribution line changed. This is only applicable for Oracle environments when the DFM has been created with EnableLineTypeDefaults set to TRUE.
  • New procedure, SetProjectDefaultsForLine. Sets the default values for additional project-related fields when the Project has been changed on an invoice line. This is only applicable for Oracle R12 environments when the DFM has been created with UseProjects set to TRUE.
  • New procedure, ValidateInvoiceLine. Performs custom validation on an invoice line. This procedure cannot change values on an invoice line. This is only applicable for Oracle R12 environments.
• **MVERP_DFM_LOV_CUSTOM**: This package has a new procedure.
  • New procedure, PopulateFlexSegmentForLine. Populates LOV for flex segment values for an invoice line. This is only applicable for Oracle R12 environments when the DFM is created with the DFM_FIELD_DFF field enabled.

Check for invalid packages

1. Log in as the MarkView database user.
2. Enter the following SQL statement:

```
SELECT OBJECT_NAME, OBJECT_TYPE FROM USER_OBJECTS WHERE STATUS
     = 'INVALID';
```

3. If invalid database objects exist, save the output from the SQL statement and run @gencomp.sql in `<distribution_directory>\installer\scripts`, where `<distribution_directory>` is the location where you downloaded and decompressed the installation files.
A message similar to the following appears:

```
Recursively compiling 2 object(s).
Please wait...
All objects compiled successfully.
```

4. Review the information in the COMPILE.LOG. If the message says that it is recursively compiling more than 0 objects, rerun @gencomp.sql. Dependencies between objects can require more than one execution to complete compilations successfully.
5. If any objects still fail to compile, run SQL*Plus SHOW ERRORS to view the error messages. Use the following format for this command:

```
SHOW ERRORS { FUNCTION | PROCEDURE | PACKAGE | PACKAGE BODY | TRIGGER | VIEW }  name
```

For example, to view the PL/SQL errors for the package body MVERP_DFM_DESCR_FLEX_CUSTOM, enter:

```
SQL> SHOW ERRORS PACKAGE BODY MVERP_DFM_DESCR_FLEX_CUSTOM
```

The errors that occurred during compilation of the object are displayed.

Update Accounts Payable workflow filters

To ensure that all workflow filters are up-to-date, log in to the database as the MarkView schema owner and run the following SQL statement:

```
begin
SF_Designer.RebuildFilterDispatch;
end;
/
exec SF_Filter_Util.UpdateAllFilterResults;
commit;
```

Note In production environments, this can be a lengthy process.

Verify that database jobs are running

1. Log in to MarkView with administrator privileges.
2. Navigate to **Utilities** > **System Status** and locate **DBMS User Jobs Broken**.

Status	Current Value	Limit	Over Limit	Description
DBMS User Jobs Broken	2	0	Y	The number of current MarkView database user jobs that are in error.
Disconnected Bar Code Server	1	0	Y	Checks v$session to see if the Bar Code server has a connection to the database.

3. Contact Kofax Technical Support if the current value for **DBMS User Jobs Broken** is greater than 0.

Install MarkView Oracle Objects

Follow the steps in this section if you installed MarkView manually as described in Run the MarkView installer.

Download the Oracle Objects installer and Verify files

1. On the Oracle E-Business Suite server, open a command shell and log in as the Oracle E-Business suite owner. The default account for this user is applmgr.
2. Create a temporary distribution directory for the compressed MarkView installer and verification files. For example, `<home_directory>/mvforms_dist` where <home_directory> is the user home directory.
3. In the distribution directory, create these subdirectories:
   - `<distribution_directory>/verify`
   - `<distribution_directory>/installer`

   Where <distribution_directory> is the temporary distribution directory you just created.
4. Download KofaxMarkView-9.1.1_Oracle_Objects_Verify.zip into the verify directory.
5. Download KofaxMarkView-9.1.1_Oracle_Objects.zip into the installer directory.
6. Decompress the files.

Run Verify on the Oracle E-Business Suite host

Use the information that you entered on the *Installation Worksheet* to respond to the Verify prompts.

1. On the Oracle E-Business Suite server, open a command shell and log in as the Oracle E-Business Suite owner. The default account for this user is APPLMGR.
2. Ensure that the environment variables are correct.
3. Ensure that the MarkView application server is running.
4. Navigate to `<distribution_directory>/verify/bin`, where <distribution_directory> is the location where you downloaded and decompressed the installation files.
5. Run **Verify**:
   - On Unix, enter ./verify_oracle_objects.sh.
   - On Windows, enter verify_oracle_objects.bat.
6. Select the products you are planning to install with the Oracle Objects installer.
   - Oracle Forms Integration

- OA Framework Integration for AP (Oracle EBS 12.x only)
- OA Framework Integration for Expense (only if you are running MarkView for Expense Management)

Consider these points when you select products:

- Only systems running Oracle EBS 12.x that also include MarkView for Account Payables can select OA Framework Integration for AP.
- Only systems running MarkView for Expense Management can select OA Framework Integration for Expense

7. Follow the prompts.
8. Review the generated reports. The reports are located in the MarkView installation directory you selected during the verification. Save these logs in another directory to prevent overwriting them.

   The file `reports/EnvironmentReport.txt` describes issues with your environment that will prevent successful installation.
9. Make changes as indicated in the failure reports. Now you are ready to run the MarkView Oracle Objects installer.

Run the MarkView Oracle Objects installer

1. On the Oracle E-Business Suite server, open a command shell and log in as the Oracle E-Business suite owner. The default account for this user is applmgr.
2. Make sure that all environment variables are correctly set up for this account, check:
   - $PATH: Confirm the appropriate Java version comes first (or run `java -version`). For the Java version, see the *Technical Specifications* document on the Kofax website.
   - $APPL_TOP: Confirm this is the correct instance of Oracle E-Business Suite
   - $FORMS_PATH: Confirm that it includes $AU_TOP/resource and $AU_TOP/forms/US.
3. Ensure that the application server is running.
4. Navigate to `<distribution_directory>/installer/bin`, where <distribution_directory> is the temporary distribution directory.
5. Start the installer by running either:
   - For Unix: ./install.sh
   - For Windows: install.bat
6. Select the applications to install. Available choices are:
   - Oracle Forms Integration
   - OA Framework Integration for AP (R12 only)
   - OA Framework Integration for Expense

   Consider the following when selecting products:

   - Only systems running Oracle Release 12 that also include MarkView for Account Payables can select OA Framework Integration for AP.
   - Only systems running MarkView for Expense Management can select OA Framework Integration for Expense.
7. Click **Next**.
8. Select **Standard Full Install** and click **Next**.
9. Click **Select Folder** to navigate to the MarkView installation directory and click **Next**.

10. If prompted, enter or select the Target Registry Services URL and click **Next**.

    For example, http://my_host.company.com:7777/mvastrs/markview

11. Enter your MarkView schema password and click **Next**.

12. Enter your Oracle applications schema password and click **Next**.

    The order and appearance of the next few steps vary depending on the installation options.

13. Review the values displayed and click **Next**:

    • **Location of APPL_TOP** value: Confirm this is the instance of Oracle E-Business Suite where you want to install Forms.

    • **Location of AU_TOP and FND_TOP** values: Confirm this is the instance of Oracle E-Business Suite where you want to install Forms (both directories should be under $APPL_TOP).

    • **Location of $c_MARKVIEW_TOP** value

14. Verify the Oracle Framework Environment Variable values APPL_TOP, COMMON_TOP, and JAVA_TOP and click **Next**.

15. Review the Summary and click **Next**.

16. Click **Install**.

    The process can take several minutes. To track the progress, click **Show Details**.

    The installation finishes with a message indicating whether the installation is successful.

    The installation script creates log files in the MarkView installation directory.

17. Click **Exit.**

Restart the Oracle EBS processes

You must restart the Oracle EBS processes to pick up the new components.

Oracle R12:

```
$ADMIN_SCRIPTS_HOME/adapcctl.sh stop
$ADMIN_SCRIPTS_HOME/adoacorectl.sh stop
$ADMIN_SCRIPTS_HOME/adapcctl.sh start
$ADMIN_SCRIPTS_HOME/adoacorectl.sh start
```

Oracle 12.2:

```
$ADMIN_SCRIPTS_HOME/adapcctl.sh stop
$ADMIN_SCRIPTS_HOME/admanagedsrvctl.sh stop oacore_server1
$ADMIN_SCRIPTS_HOME/adapcctl.sh start
$ADMIN_SCRIPTS_HOME/admanagedsrvctl.sh start oacore_server1
```

Add the log4j logging library to the class path (Oracle EBS 12.2 only)

After running the Oracle Objects installer on Oracle EBS 12.2, manually add the log4j library to the class path. If you do not add the log4j library, you may encounter errors while working with Oracle Forms. For example, an unexpected error may occur in the iExpenses module.

1. Extract the $JAVA_TOP/log4j.jar file into a temporary directory.

   For example, from a UNIX shell, run the following commands:

   ```
   $ cd $JAVA_TOP
   $ mkdir /tmp/log4j
   ```

```
$ cp -p log4j.jar /tmp/log4j
$ cd /tmp/log4j
$ jar xf log4j.jar
```

2. Move or copy the org directory from the temporary directory to $JAVA_TOP. The unpacked org directory contains one directory called log4j.

   For example, from a UNIX shell, run the following command:

```
$ mv /tmp/log4j/org $JAVA_TOP
```

3. Run the Oracle Adadmin utility to generate the new .jar files.

   1. From the Oracle Adadmin utility, select option **1: Generate Applications Files menu**.

   2. Select option **4: Generate product JAR files**.

   3. If you wish to force regeneration of all .jar files, when prompted, enter **Y**.

Capture and Output modules

Before you upgrade any Capture and Output module, verify that you upgraded the MarkView Application Server and Database components.

Download and extract the Installer and Verify files

Download the compressed MarkView System setup files from the location provided by your Kofax representative.
- Capture and Output Server host for the following servers:
  - Fax Server
  - Barcode Server
  - Mail Gateway Server
  - MarkView Import Server
- Data Export Server
- Kofax Capture Server host
- Kofax Transformation Modules Server host

To access the files:
1. Log in as the local administrator for the operating system for the Windows Capture and Output server.
2. Create a temporary distribution directory for the compressed MarkView installer and verification files, for **example,** `C:\mvcodist.`
3. In the distribution directory, create the following subdirectories:
   - `C:\mvcodist\verify`
   - `C:\mvcodist\installer`
4. Download KofaxMarkView-9.1.1_Capture_Output.zip into the installer directory.
5. Extract the files.

> **Note** The built-in ZIP utilities in certain versions of Windows, have issues with lengthy directory paths. Use a third-party extraction utility if your directory paths are more than 200 characters long.

Update the path

For the MarkView Capture and Output installer Java JDK version, see the *Technical Specifications* document on the Kofax website.

To check your version, run `java -version`.

Add the location of Java to the beginning of the Windows Path statement.

Uninstall Brooktrout drivers

Before upgrading MarkView Fax Server, stop it and uninstall the Brooktrout 6.2 drivers. When you upgrade the MarkView Fax Server, it automatically installs the Brooktrout 6.5 drivers. If you do not uninstall the Brooktrout 6.2 drivers, the MarkView Fax Server installation completes correctly, but you will need to uninstall the Brooktrout 6.2 drivers and reinstall the Brooktrout 6.5 drivers manually after you upgrade MarkVIew.

Run the Capture and Output modules installer

Use the information that you entered on the *Installation Worksheet* to respond to the prompts.

1. Stop MarkView Capture and Output server components before running the installer.
2. Log in as the local administrator for the operating system for the Windows Capture and Output server.
3. Navigate to `<distribution_directory>\installer\bin` and run install.bat.
4. All products available on all installers are listed on the **Which products do you want to install for this environment?** page. Select only the products you are planning to upgrade with the Capture and Output installer and click **Next**.
   - MarkView Fax Server: Supports RightFax
   - MarkView Barcode and Mail Gateway
   - MarkView Import Server: Supports the Fax Server and is silently upgraded when you upgrade the fax server software. You do not need to upgrade the MarkView Import Server separately.
   - MarkView Data Export Server

   The **Installation Type** window opens.
5. Select **Standard Full Install** and click **Next**.

   Use the **Partial Install** option only if client components are installed in multiple locations and the database components should not be installed again.
6. Browse to the **MarkView Installation Directory** where the target_registry_service.properties file resides and click **Next**.

   The **MarkView Installation Directory** stores the install logs and the target_registry_service.properties file. This file contains the TRS URL, the location where the values entered in response to Installer prompts and module version information are stored. This document refers to the installation directory as <installation_directory>.

The system prompts you for the MarkView schema connection information.

7. Enter the **MarkView Schema Password** and click **Next**.

8. Review the summary of your selections and click **Next**.

9. Click **Show Details** to display the process status.

10. Click **Install** to start the InstallShield Wizard.

11. Follow the prompts to upgrade the components you selected. If you selected Fax, the system automatically upgrades Import Server.

12. When prompted to select the upgrade directories, browse to the base directories where the Capture and Output components were originally installed.

13. Follow the prompts to complete the process. The prompts depend on your system configuration and which Capture and Output modules you are upgrading. These prompts may include items similar to the following:

   • **Export Server Instance**: If you are prompted for an **Export Server Instance**, click **Close** to accept the default.

   • **Import Server Instance**: If you are prompted for an **Import Server Instance**, click **Close** to accept the default.

   • **Restart**: If the system prompts you to restart:

      • If the system has not upgraded all the Capture and Output modules you selected, select **No, I will restart later** and click **Finish**.

      • If the system has completely upgraded all the Capture and Output modules you selected, select **Yes, I will restart now** and click **Finish**.

   • **Setup Type**: If you are prompted for the **Setup Type**, select **Typical** and follow the prompts.

14. Click **Finish** on the **Maintenance Complete** window.

15. Reboot the system to activate the changes.

Integrate with Kofax Capture and Kofax Transformation Modules

Before you upgrade Kofax MarkView Export Connector, verify that your system meets minimum system requirements. See the *Technical Specifications* document on the Kofax website for the version numbers.

MarkView requires:
• Kofax Capture and 32-bit ODBC drivers
• ODAC with the following required components:
   • Oracle Data Provider for .NET
   • Oracle Provider for OLE DB
• For transformation, you also need Kofax Transformation Modules

Upgrade Kofax MarkView Export Connector

Perform the following procedure on all machines running Kofax Capture or Kofax Transformation Modules, including all scan and validation stations. Make sure that you backed up the files described in Back up the Kofax Transformation Modules project and batch classes and Back up XSLT files.

1. Log in as an administrator.

2. On the MarkView Application Server host, navigate to the MarkView installation directory, open the export connector directory, and locate the kcec-markview.msi file.

   For example: `<installation_directory>/export-connector/kcec-markview.msi`

3. Copy kcec-markview.msi to a temporary directory on the Windows machine on which Kofax Capture is installed.

4. To start the installation, run kcec-markview.msi as Administrator or use the Administrator command line.

5. When the installation wizard opens, follow the prompts.

   When the installation is complete, a message indicates that Kofax MarkView Export Connector is successfully installed.

6. Click **Finish**.

7. Verify that the Kofax Capture service is running.

8. Repeat these steps on all scan and validation stations.

Kofax Transformation Modules project templates

Note The Kofax Transformation Modules project was updated as part of the service pack.

Follow the instructions in this section to prepare the project template and batch class templates. For more information, see the user documentation for Kofax Transformation Modules and Kofax Capture.

MarkView automatically installs the project template MarkView KTM Invoices 50 in `C:\KTM\Markview`. When you customize the project, create a new runtime version of the project directory that stores the Kofax Transformation Modules project .fpr file and all the files needed for the project.

Copy your customized Kofax Transformation Modules project files to a safe location before you upgrade. After you upgrade, refer to your customized project files when you manually edit the new project files. Then, save the edited project files in your runtime directory, such as `C:\KTM\Markview\MyProject`.

Prepare the Kofax Transformation Modules project template for use

1. Ensure that you have read-write access to the Kofax Transformation Modules project:

   1. In Windows, navigate to your Kofax Transformation Modules project directory, such as `C:\KTM\Markview`.

   2. Select the Kofax Transformation Modules project and right-click **Properties**.

   3. Select the **General** tab and clear **Read-only**.

   4. Select **Apply changes to this folder subfolders and files** and click **OK**.

   5. Click **OK**.

2. Start Kofax Transformation Modules Project Builder.

3. Open the Kofax Transformation Modules project:

   1. Select **File** > **Open Project**.

   2. Locate the MarkView KTM Invoices project folder, such as `C:\KTM\Markview`.

   3. Open the MarkView KTM Invoices 50 project file.

> A warning may appear. Click **Close** to close the warning. You will address any warnings later in this process.

4. Click **Save Project As** and save the edited project to a new name.

   MarkView creates a new directory under `C:\KTM\Markview`, such as `C:\KTM\Markview\MyProject` and stores the Kofax Transformation Modules project .fpr file and all the files needed for the project.

5. Select **Project** > **Script Variables** and set the following script variables:

   - **Project type** : Enter **Oracle**.
   - **Oracle Version** : Enter the Oracle version.
   - **Demo**: Select True or False (set to False when connecting to a live MarkView environment).
   - **DatabaseDataSource**: Specify the connection string for the Oracle database where the MarkView schema is located in the format of tns_names_entry.SID.
   - **DatabaseUID**: Enter the MarkView schema name.
   - **DatabasePWD**: MarkView database password.

6. For R12 environments, point the **TaxCodes** database to a blank TaxCodes.txt file.

   The data export service properties for **TaxCodes** do not apply to R12. However, for the Oracle R12 environment, you need to point the database to a blank TaxCodes.txt file to prevent Kofax Transformation Modules project validation errors.

   - Create a blank TaxCodes.txt file in your Kofax Transformation Modules project directory, such as `C:\KTM\Markview\KTMSourceFiles\Databases`.
   - In the Kofax Transformation Modules project, select **Project** > **Project Settings** > **Databases**.
   - Select **TaxCodes** and click **Properties**.
   - Specify the full path to the blank text file. For example, `C:\KTM\Markview\KTMSourceFiles\Databases\TaxCodes.txt`.

7. Set the **LineItems** properties:

   1. Select **Project** > **Project Settings**.
      The **Project Settings** window opens.

   2. Select the **Tables** tab.

   3. In the **Table Models** area, highlight **LineItems** and click the **Edit Table Model Properties** icon.
      The **Properties** window opens.

   4. In the **Visible** column, enable the check boxes for the following fields for Oracle EBS 12.x:
      - **R. Code**
      - **Tax**
      - **Tax Status**
      - **J. Code**

   5. In the **Visible** column, clear the check boxes for the following fields for Oracle EBS 12.x:
      - **Receipt Year**
      - **Service Entry Sheet Number**
      - **Service Entry Sheet Line Number**
      - **Tax Code**

   6. Click **OK** to close the window.

   7. Click the **Show Extraction Design** icon on the icon bar in the middle of the window.

8. Double-click the **LineItems** field definition.

   The **Properties** window opens.

9. In the **Always Valid** column, enable the check boxes for the following fields for Oracle EBS 12.x:

   • **Receipt Year**
   • **Service Entry Sheet Number**
   • **Service Entry Sheet Line Number**
   • **Tax Code**

10. In the **Always Valid** column, clear the check boxes for the following fields for Oracle EBS 12.x:

    • **R. Code**
    • **Tax**
    • **Tax Status**
    • **J. Code**

11. Click **OK** to close the window.

8. (Optional) If you need to set the default Organization ID value, configure the DefaultOrgId variable.

   For example, if the **Organization ID** field is blank, the vendor list is not filtered by Organization ID correctly. The DefaultOrgId variable value used by Vendor Locator (VL locator) filters vendors.

   1. Navigate to **Project** > **Script Variables**.

   2. In **Name**, locate **DefaultOrgId**.

   3. For the **DefaultOrgId** variable, set the appropriate Organization ID value and click **OK**.

9. For Kofax Transformation Modules version 6.2.0, manually add the reference "Kofax Transformation database lookup for script integration (11.0)."

   1. In Project Tree, right-click **Project Class** and select **Show Script**.

   2. In the **Project - Script Code** window, click **Edit** and select **References**.

      To add the reference to the list, browse to the location of DatabaseDialog.tlb, such as: `C:\Program Files (x86)\Common Files\Kofax\Components`. To select the DatabaseDialog(11.0) reference, open DatabaseDialog.tlb.

   3. In Project Tree, right-click **Invoice Class** and select **Show Script**.

   4. In the **Project - Script Code** window, click **Edit**, select **References**, and add the same reference.

   5. Click **Validate Project**.

      The warning message "The scripted database lookup window is deprecated" may still appear during the validation. After you added the required reference, this is expected behavior and does not influence the validation process.

Validate the Kofax Transformation Modules project

1. Select **File** > **Validate Project**.
   Kofax Transformation Modules displays any error messages related to the project.

2. If you see database validation warning messages, reestablish links in the project to correct the database text files.

    1. Select **Project** > **Project Settings**.

    2. Select the **Databases** tab. Find and correct any database validation issues.

3. If you see library errors, reestablish links in the project to correct the dictionary text files.

    1. Select **Project** > **Project Settings**.

    2. Select the **Dictionaries** tab.

    3. Select the dictionary with validation errors and click **Properties**.

    4. In the **Referenced import** file box, select the text file of the server with the same name as the dictionary (such as `C:\KTM\MarkView\KTM Source Files\Dictionaries \DocumentType_Validation.txt`) and click **OK**.

    5. Click **Import** to reimport the dictionaries.

4. Repeat the validation until the process no longer generates errors.

5. If you want to change the default online learning folder defined for the Kofax Transformation Modules project.

    1. Select **Project** > **Project Settings**.

    2. Select the **General** tab.

    3. Under **Online Learning**, select **Enable online learning**.

    4. In the **Path to online learning** box, browse to the appropriate folder (such as `C:\KTM \OnlineLearning_MarkView`) and click **OK**.

6. Select **File** > **Save Project Settings**.

7. Click **File** > **Exit** to close **Project Builder**.

About Kofax Capture batch class templates

The following batch class templates are available when imported:

- MarkView Document: Used to separate documents that are not processed by Kofax Transformation Modules.
- MarkView Invoice: Used to separate documents that are processed by Kofax Transformation Modules.

The batch class templates are set up with batch fields based on Kofax Capture Values, such as Batch Name, Batch ID, Batch Creation Date, Batch Creation Time, and Scan Operator.

Import the batch class templates

1. Log in to Kofax Capture as an administrator.

2. Select **Import**.

3. In the **Open** window, select `C:\KTM\MarkView\Markview.cab` and click **Open**.

4. In the **Import/Export** window, click **OK** when the unpacking is completed.

5. In the **Import** window, click **Add All**.

6. Select **Save duplicates to new name**.

7. Click **Import**.

8. Follow the prompts to save the batch classes to a new name.

9. Click **OK** when the import is completed.

Prepare the batch class templates

1. Highlight the MarkView Document batch class.

2. Select **Properties**.

3. On the **Separation and Form Identification** tab, select **Custom**. From the list, select **MarkView Bar Code Separators** and click **Edit Profile**.
   The **Custom Separation and Form Identification Profiles** window opens.

4. Enter the following values:

   • Enable **Bar Code**.

   • From the list, select **MarkView Bar Code**.

   • Set **Found on stand-alone separator sheet** as follows:

     • To discard the bar code cover sheet after import, select this option.

     • To keep the bar code cover sheet with imported documents, clear this option.

   • In the **Search Text** field, enter:
     ^(CP|DT)ID-

   • Enable **Treat search as regular expression**.

5. Click **Save** and **Close**.

6. Click **Apply**.

7. Select the MarkView Invoice batch class and repeat steps 2 through 6.

Customize the batch class templates

If you customized your batch classes, copy your customized batch classes to a safe location before you upgrade. After you upgrade, refer to your customized batch classes when you manually edit the new batch classes. Then, save the edited batch classes in your runtime directory, such as `C:\KTM\Markview \MyProject.`

Synchronize the MarkView batch classes with the Kofax Transformation Modules project

1. In the Kofax Capture Administration module **Batch** tab, right-click the **MarkView Invoice** batch class and select **Synchronize Kofax Transformation Project**.

2. In the **Synchronization Tool** window, select the **Classes** tab.

3. Select **File** > **Load Project**.

4. In the **Project File** window, open the project (the .fpr file).

5. When the system notifies you that you are replacing the project, click **Yes** to keep the existing class and field settings.

6. Click **Next Step**.
   The **Synchronization Tool** window displays data in two columns: **Extraction Field** and **Index Field.**

7. If you have Kofax Capture 10, verify that Unit Price is set correctly in both the **Extraction Field** and **Index Field** columns:

   1. Scroll down in the **Extraction Field** list until you see **Unit Price**.

     2. If necessary, use the drop-down list to change the value in the **Index Field** column to **Unit Price.**

8. Click **Next Step**.

9. Click **Synchronize**.

10. When synchronization is complete, verify the batch class image folder location.

     1. Right-click the batch class and select **Properties**.

     2. In the **Batch Class Properties** window **Image folder** field, verify the path.

11. Click **OK** to save and exit.

Set up Kofax MarkView Export Connector

After you associate a document class with a batch class in Kofax Capture, specify and set up Kofax MarkView Export Connector to use when exporting your documents.

1. Start Kofax Capture Administration.

2. Select the **Batch** tab.

3. Expand the batch class to view associated document classes.

4. Right-click the **MarkView Document class** and select **Export Connectors**.

   The **Export Connectors** window lists all available export connectors. Available export connectors are those that are registered with Kofax Capture.

5. Under the **Available Export Connectors** column on the left side of the window, select **Kofax MarkView Export Connector**.

6. Click **Add** to add **Kofax MarkView Export Connector** to the list of assigned export connectors.

7. In the **Assigned Export Connectors** section, select **Kofax MarkView Export Connector** and click **Setup**.

8. In the **Kofax Capture Export Connector - MarkView** window, specify the settings for exporting documents.

   • **Name**: MarkView Document EC

   • **Export Settings Instance**: MarkView Document

   • **Skip first page of each document**: Clear this check box

   • **Threshold**: Select **Enable**

9. Click **Apply** and click **OK**.

10. Close the **Export Connectors** window.

11. Right-click the MarkView Invoice class and select **Export Connectors**.

   The **Export Connectors** window lists all available export connectors. Available export connectors are those that are registered with Kofax Capture.

12. Under the **Available Export Connectors** column on the left side of the window, select **Kofax MarkView Export Connector**.

13. Click **Add** to add **Kofax MarkView Export Connector** to the list of assigned export connectors.

14. In the **Assigned Export Connectors** section, select **Kofax MarkView Export Connector** and click **Setup**.

15. In the **Kofax Capture Export Connector - MarkView** window, specify the settings for exporting invoices.

   • **Name**: MarkView Document EC

- **Export Settings Instance**: MarkView Invoice EC
- **Skip first page of each document**: Clear this check box.
- **Threshold**: Select **Enable**

16. Click **Apply** and click **OK**.
17. Close the **Export Connectors** window.

Publish a batch class

After you select the batch class settings, publish the batch class. The publishing process checks the integrity of the settings in your batch class and makes the batch class available for use. If problems exist with any of the settings, error and warning messages appear along with the recommended actions for fixing the problems.

If you edit your batch class, you must publish your batch class again before using it. Changes are not applied to batches created before the new publication date.

1. Start the Kofax Capture Administration module.
2. Select the **Batch class** tab.
3. Right-click the batch class and select **Publish** from the **Context** menu.
   The **Publish** window opens.
4. Select your batch class and click **Publish**. Kofax Capture checks all of your batch class settings and displays the results in the **Results** box.
   - If no problems exist, the message "Publishing successful" appears.
   - If problems exist, error and warning messages appear along with the recommended actions to resolve the problems. Perform the recommended actions, and then try to publish the batch class again.

After successfully publishing, you can create batches based on your batch class. As your batches flow through your Kofax Capture system, they are routed from module to module. The batch class definition specifies the modules that process a batch and the order in which processing occurs.

XSLT files modification

If you customized your existing XSLT file, apply your customizations to the new XSLT files and restart the Kofax Capture service.

Resolved issues

This chapter lists issues that are resolved when you install Kofax MarkView 9.1.1.

Synchronization of a manually created user

The AUSS synchronization with the **Synchronize one user** tool failed for a manually created user. (1107978)

Error during deployment to the application server

The following error message appeared during deployment to the application server during the installation (1104209):

```
Encountered problem while trying to execute InstallInstructions: Failure executing
target 'install' in project 'erp-integration-oracle' Exception thrown while performing
action DEPLOY to the application server.
```

Reintegrate _CUSTOM packages instruction missing

The "Reintegrating _CUSTOM packages" instruction was not outlined in the "Apply the service pack" chapter in the release notes. (1097256)

Vendor Data Export service errors

The MarkView Vendor Data Export service did not populate the vendors.txt file as expected. The following error message appeared in the Event Viewer log file (964608):

```
Error processing data function:

Exception of type 'System.OutOfMemoryException' was thrown.

at System.Data.Common.StringStorage.SetCapacity(Int32 capacity)

at System.Data.RecordManager.set_RecordCapacity(Int32 value)

at System.Data.RecordManager.GrowRecordCapacity()
```

Origin Information not displayed for new batches

The Origin Information section for the Document displayed "No data to view". (960074)

Batch Print not working from Invoice Audit

In Invoice Audit, after you clicked Print to print an invoice, the following error appeared (957359):

```
An error occurred in submitting the print request. An incorrect print queue setup could
cause this error. Contact your MarkView System Administrator.
```

Custom authentication issues

The custom authentication was not working correctly. (894100)

Known issues

This chapter lists issues that you may encounter while using Kofax MarkView 9.1.1. Workarounds are provided, as applicable.

Inconsistent date format in AUSS

On the AUSS Current Status, AUSS Options, Synchronization, and Journal pages, characters used as date separators are different. (1077018)

Incorrect time sorting in AUSS Journal

The AUSS Journal page displays the synchronization history by time in descending order, but the sorting does not take into account the AM and PM format. (1076962)

Error during MarkView installation with WebLogic 12.2

If you use MarkView with WebLogic Server 12.2, the installation may fail with the error (1075168):

```
Failure executing target 'install' in project 'frameworks' Exception thrown while
performing action DEPLOY to the application server.
```

Workaround:

1. Locate the following file:

   `<installation_directory>/Oracle/Middleware/Oracle_Home/wlserver/modules/`
   `com.oracle.weblogic.security.opensaml2.jar`

   Where `<installation_directory>` is the location where you installed WebLogic Server 12.2.

2. Remove the file or change the file extension.

Incorrect version number

In Kofax Capture Administration, the Workflow Agent Manager window displays incorrect Kofax MarkView Batch Number version. (980199)

Missing references in the MarkView KTM Invoice project

For Kofax Transformation Modules version 6.2.0, the following warning message may appear (961092):

```
The scripted database lookup window is deprecated.
```

Workaround:

1. In Kofax Transformation Modules **Project Builder**, open the Kofax Transformation Modules project.

2. In Project Tree, right-click **Project Class** and select **Show Script**.

3. In the **Project - Script Code** window, click **Edit** and select **References**.

   To add the reference to the list, browse to the location of DatabaseDialog.tlb, such as: `C:\Program Files (x86)\Common Files\Kofax\Components`. To select the DatabaseDialog(11.0) reference, open DatabaseDialog.tlb.

4. In Project Tree, right-click **Invoice Class** and select **Show Script**.

5. In the **Project - Script Code** window, click **Edit**, select **References**, and add the same reference.

6. Click **Validate Project**.

   The warning message "The scripted database lookup window is deprecated" may still appear during the validation. After you add the required reference, the warning is expected, even though it does not influence the validation process.

7. Select **File** > **Save Project Settings**.

8. Click **File** > **Exit** to close **Project Builder**.