



ReadSoft DOCUMENTS | FORMS

Upgrading to FORMS 5-3

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Introduction

The information in this document only applies when upgrading from FORMS 5-2 to FORMS 5-3.

If you are about to upgrade an existing FORMS 4.1x or FORMS 5-1 system to FORMS 5-3, changes in interpretation rates and interpretation speed may affect your system. In addition, changes in how scanner settings are handled may require you to change your form definitions. Finally, there are some issues for customers whose FORMS solutions have been extensively customized to consider. For more information concerning these issues, see *Upgrading to FORMS 5-2.pdf* before continuing with this document. You can get the document from your ReadSoft representative or from the customer website at <http://www.readsoft.com/customer/> (you will need your password).

Before you upgrade!

Items and functionality no longer available with FORMS

The following items and functionality are not available/supported in FORMS 5-3. If you require them, do not upgrade to FORMS 5-3.

- The form definition optimizer
- GUI and documentation in these languages: Danish, Italian, Latvian, Portuguese
- WEB FORMS
- FORMOUT
- ReadSoft MONITOR
- ReadSoft ADDRESSES
- ReadSoft EMAIL
- Support for Velocis databases
- Support for Birdstep RDM databases
- Support for SQL Server 2000
- Support for Windows 2000

Items no longer provided on the installation CD

- Translated handbooks including the tutorial (only the English version is provided)
- Sample DLLs (previously found in \Samples\DLLs)
- SCSI/Kofax drivers (provided with scanners)
- MDAC
- ODBC



Never upgrade your production system before testing the upgrade

We recommend that FORMS system administrators participate in core product training (Basic Training and Advanced Training) before the upgrade.

If you need assistance with your FORMS upgrade, ReadSoft Professional Services offers an *upgrade pre-study* that tells you:

- Whether the current configuration needs to be changed
- Whether hardware must be upgraded
- Whether current customizations (if any) need to be upgraded
- Whether your staff needs additional training for the new version of FORMS
- A time plan and estimated cost for the upgrade

Contact your nearest ReadSoft subsidiary if you are interested in participating in FORMS training or ordering an upgrade pre-study.

When you are ready to upgrade, ensure that these particular points are not neglected:

1. Check the system requirements listed in *Installing FORMS 5-3* to ensure that your system fulfills the requirements. This document is available on the installation CD (`\software\ReadSoft\FORMS\Documentation`).
2. Make a copy of your `Ehlocal.ini` file (located in the `Windows` directory in XP and `C:\Users\Public\ReadSoft\FORMS` in Vista) and save it in another location. You cannot use it to replace the FORMS 5-3 version, but it may help you in recreating the scanner settings used by your existing installation, in addition to other possible support situations.
3. During installation, follow the instructions in the *Installing FORMS 5-3*. It contains important information about how to upgrade an existing installation.
4. In order to use FORMS 5-3 in a network, the FLEXlm flexible license manager software that is included on the FORMS installation CD must be installed on a server that is reachable from FORMS clients. Obtain a license file from your FORMS reseller. Also, check your `Services` file for which port number is used. It should be 27000 to 27009.

For installation instructions and other information, see *Installing and Configuring FLEXlm for use with ReadSoft FORMS*, a ReadSoft document that is available on the installation CD (`\software\ReadSoft\FORMS\Documentation\Installing FLEXlm for FORMS.pdf`). For any other information about FLEXlm, contact your ReadSoft representative.

5. *Test the upgrade before using it in production.*



Handling form definitions

Before you upgrade:

1. Process all forms that are currently in your database(s).
2. Export your form definitions from the current version of FORMS.
3. Install FORMS 5-3.
4. Import the form definitions exported from the previous version in step two.

When you import form definitions that were exported from FORMS 5-2, the form definition settings (those made in the **Form definition settings** dialog) are included.

Notes

- Once the form definitions have been saved in FORMS 5-3 format, they can no longer be used with FORMS 5-2.
- If you already have a working SQL 2005 server installation prior to installing FORMS 5-3, it is not necessary to reinstall it or re-initiate the databases.



INI file settings moved to user interface

The settings listed in the table below were previously found in FORMS 5-2 initialization files, but they are now configured using the program interface in FORMS 5-3. They are located in the **Identification** dialog, which you can access from the Scan or Interpret job description.

When you import form definitions that were exported from FORMS 5-2, the form definition settings (that is, those made in the **Form definition settings** dialog using the program interface) are included.

Important: Therefore, to avoid negatively affecting identification results, these settings must be specified in the job descriptions (or, alternatively, in your form definitions) in your FORMS 5-3 installation if the corresponding INI setting was used in your FORMS 5-2 installation.

Refer to *FORMS Help* for information and instructions. (Look for “flexible forms” in the index.)

Setting	INI file [Section]	Name of setting in the <i>Identification</i> dialog
RubberSheet	Ehlocal.ini [Interpret]	Rubber sheet
RubberSheetMinErrorThreshold	Ehlocal.ini [Interpret]	Apply rubber sheeting when global error is greater than...
RubberSheetMaxLocalErrorThreshold	Ehlocal.ini [Interpret]	Abort rubber sheeting when local pixel error is greater than...
LocalFieldDisplacement	Ehglobal.ini [Interpret]	Local field displacement
ExtendedSearchArea	Ehglobal.ini [Identify]	Extended search area
CleanScan	Ehglobal.ini [Identify]	Without skew and offset

INI File settings obsolete in FORMS 5-3

These settings from the FORMS 5-2 initialization files are obsolete in FORMS 5-3 (they are handled automatically by FORMS 5-3):

Setting	INI file [Section]
OptimizeAdjustFields	Ehglobal.ini [Identify]
LowQualityAdjustmentFields	Ehlocal.ini [Manager]



Customization issues

Users with extensive customizations (other code integrated via FORMS' API) need to test them with FORMS 5-3 before going into production. For more information about new functionality, [see FORMS Help](#), ReadSoft's website (www.readsoft.com), or contact your local FORMS reseller.

Changes in the Connect method

You should also be aware that the `Connect` method has changed: `strInifile` in **ByRef** `strInifile As String`, which previously represented the file name only, now includes both the path and the file name.

Additional information

For specific questions, check a recent version of *FORMS API Help*. (The file name is `FORMS-API.chm`, and you can find it in FORMS' `Documentation` directory. The latest version of the file is also available from ReadSoft's Customer Web at <http://www.readsoft.com/customer/forms/> — where you will need your user name and password.)

You can also get help with customization issues from ReadSoft Professional Services, as described on page 5.

