

FORMFUSION

1.6 to 1.9 Upgrade Instructions

Document version 1.9.2 – Unix/VMS/NT

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NOTES FROM THE PROGRAMMING STAFF

**** Please perform this upgrade in your Test environment to ensure all FormFusion templates are printing correctly *BEFORE* upgrading your Production environment ****

Who should perform this installation? We recommend that your system DBA or host system administrator perform this installation. The person installing the software on the server should have a working knowledge of Banner and the text editor used on their system.

We welcome your suggestions and ideas! As we continue to enhance this program, we will need end users' input on how to make it better. As software developers, we try to identify the best solution to a problem without having the opportunity to use the application in all of the "real world" situations and configurations. We would welcome your feedback on how we can make our software work best for you. We are always interested in improving and adding features that make the end user's life easier—and the application better. If you have suggestions for improving FormFusion or ideas for additional products that you would like to see, please contact us at any of the above addresses.

If you have any questions during this upgrade, please contact us at:

Web site support: <http://www.evisions.com/support>
HelpDesk: <http://helpdesk.evisions.com>
Phone: 949.833.1384



BEFORE YOU BEGIN: A BRIEF OVERVIEW

This document will guide you through installation of the newest version of FormFusion. If you have questions please call before proceeding. You will be uninstalling the client software and installing a newer version of the client and server. The server will be compiled in the same manner as the original version of the software using the eviadm server process.

We recommend that you back up your FormFusion data before performing the automated upgrade (Step 3). Although the back up is optional, we encourage you to take this step and provide you with information in the **Backing Up FormFusion Data** section to assist you with the back up process. The conversion process has been fully tested by our staff; however, Evisions accepts no liability for any lost or damaged data resulting from the upgrade process.



WHAT'S NEW IN THIS VERSION

This version includes a number of behind the scenes enhancements to various portions of the software.

Developer Client

MapForm

- Fixed comma-delimited display for MapForm
- Fixed floating fields corruption when dynamic header is used

CaptureForm

- Fixed disappearing CaptureForm query after making a copy
- Fixed order issues with queries where order resets to 0
- Added new "test" type for CaptureForm queries
- Fixed drag-n-drop reordering issues

FormStamp

- Fixed the data field PCL font when a new data field is added
- Fixed issues with date/time formatting
- Fix for export of PCLForm if a data field's variable has been deleted
- Fix for export/copy of PCLForm with page size of anything other than 8 1/2 x 11
- Changed default background of text boxes to have be transparent
- Fixed Text object maximum length. Was artificially limited to 4000 characters
- Added support for PNG and GIF image formats

General

- Modified several error dialogs to be more intuitive
- Fixed collate image

- Fixed Access Violation when pressing F1 on SPP Form
- Changed group icon from the open package to a folder
- Other visual/UI enhancements
- Fixed access violation after creating tables for first time in administrator
- Added new FormDirector: ScriptDirector

Server (evilp)

- Ignoring empty CaptureForm queries
- Suppressing PASSWORD in log file
- Added all flags to the usage list
- Fix for variables containing escape characters and apostrophes in email body
- Fixed execution when FormDirector record exists but no directors have been added; the default is PrintDirector
- Fixed issues with sorting and first/last page instructions
- Speed increase for larger templates (upwards of 30% faster)
- Support for ScriptDirector



STEP 1: INSTALLING THE NEW CLIENT

- 1.1 Double-click the new executable that we have provided via download and let the installation run.
- 1.2 When you are asked to choose the Setup Type, we recommend the following selections:
 - For an Administrator's installation, choose the **Full** install option.
 - For a workstation that is not expected to perform any administration of FormFusion, choose the **Typical User** option.



STEP 2: UPGRADING THE DATABASE TABLES

There are several tables that will be updated by completing the steps below.

- 2.1 On the FormFusion menu in Developer, click on **Tools** and select **Administration Wizard**.
- 2.2 Select the database instance to administer.
- 2.3 Now click the **Tables** button. This area of the Administration Wizard will update the existing tables of FormFusion to the newer format. At this point, a prompt will appear to log in as the EVISIONS user.

*IMPORTANT: Make sure the Evisions user is logged in and not another DBA user. This will insure that the proper permissions are in use to alter one of the FormFusion tables.

After logging in, the **Database Conversion** dialog will appear and guide the conversion process. Click **Next** to begin the conversion process.

Since a new table (EVIFDSQL) is being created, a prompt will ask if a public synonym should be created for this table. Click **Yes** to create synonym.

- 2.4 Next, click on the **Create Sequence** button and press **OK** on the window. NOTE: This step requires the EVISIONS user to have the CREATE SEQUENCE privilege in Oracle. If the EVISIONS user does not have this privilege the message window will say the sequence was created, but an error will occur when updating existing templates or importing new templates saying sequence not found. See Appendix A for more info on creating sequences.
- 2.5 Now click **Finish** to return to the main Administration Wizard.
- 2.6 Click **Finish** to end the Administration Wizard for FormFusion.
- 2.7 Log into FormFusion.

At this point, a dialog should appear informing you that a newer version of FormFusion Server exists on your local machine. This message is referring to the source files that are compiled to create the EVILP process on your server. Click **Yes** to copy the newer files to your server.

You have completed the Administration steps for configuring a database for use with FormFusion 1.9. To configure another database, repeat the configuration process beginning with step 2.1 above.

NOTE: *PLEASE CONTACT EVISIONS TECHNICAL SUPPORT IF YOU HAVE ANY PROBLEMS WITH THIS PHASE OF THE UPDATE.*



STEP 3: COMPILING THE NEW SERVER PROCESS

- 3.1 The **eviadm.pc** file is located in the **C:\Program Files\Evisions\FormFusion\Server** directory on the client component. FTP the file in ASCII mode to the evisions directory on the server host.
- 3.2 Log in to the Banner account.
- 3.3 Change to the **evisions** directory that contains the new **eviadm.pc** file you transferred.
- 3.4 Compile **eviadm.pc** by entering the commands specific to your system:

Unix

```
make -f $BANNER_LINKS/sctproc.mk eviadm
CHECKOPT=sqlcheck=limited
```

VMS

```
@gen$com:sctproc eviadm "limited"
```

NT

Set the following environment variables by typing the text below, replacing **PROD** with the appropriate database instance (**PPRD**, **TRNG**, **SEED**, etc.):

```
ORAENV PROD
```

Set your path according to your specific system. Make sure to use the short directory name if there are spaces or any directory names exceeding eight characters.

```
set EVIPATH=c:\sct\banner\evisions
```

Enter the text below:

```
set INCLUDE=%EVIPATH%;%INCLUDE%
```

Compile **eviadm.pc** by entering the command below on one line with no carriage returns. The text appears on multiple lines below for illustration purposes only!

```
perl %BANNER_HOME%\general\misc\sctproc.pl  
-prog="%EVIPATH%\eviadm.pc"  
-checkopt="sqlcheck=limited include=%EVIPATH%"
```



STEP 4: RUNNING THE NEW SERVER PROCESS

4.1 Choose the correct path based on your system and start **eviadm**:

Unix

Entering the following text at the command prompt from **\$BANNER_HOME/evisions**:

```
$EXE_HOME/eviadm
```

VMS

Enter the following text at the command prompt from **BAN_HOME:[evisions]**:

```
run GEN$EXE:eviadm
```

NT

NOTE: *IF YOU INTERRUPTED THE INSTALL PROCESS AFTER EXECUTING THE PREVIOUS STEP, BE SURE TO RE-ESTABLISH THE PROPER ORACLE AND BANNER ENVIRONMENTS BY EXECUTING THE EVIPATH AND INCLUDE COMMANDS IN STEP 3.4.*

Enter the following text at the command prompt from **e:\sct\banner\evisions**:

```
e:\sct\banner\general\exe\eviadm
```

NOTE: *IN THE TEXT ABOVE, E:\SCT\BANNER REPRESENTS YOUR SYSTEM'S PATH TO THE GENERAL\EXE DIRECTORY.*

4.2 You should now see the FormFusion Server Administration menu. This menu will allow you to compile the **evilp** server software. The main menu will present you with two options:

"A" - Import Tables

"B" - Compile FormFusion Software

Select option "**B**" unless Evisions Technical Support provides you with other instructions.

- 4.3 Because FormFusion works directly within Banner security, the server process needs to be compiled with the proper Banner encryption seeds. You will be presented with the following options:

1. Manually type these values
2. Automatically detect (requires a DBA user login)
3. Reference seed values in "guassed.h"

Option 2 is used most commonly so that the menu will automatically detect what the seed values are for your system. After selecting any of the above options you will be presented with an additional prompt asking for information.

If you selected option 2 you will be required to provide a valid Oracle DBA login name and password. The menu then goes to the proper Banner table and retrieves the seed values that FormFusion needs.

- 4.4 After providing the required seed values you will be presented with the different versions of **evilp** that exist in your FormFusion program table (EVIPROGRAM). You will be prompted to enter the version you would like to compile.

You should select **version 1.9**. If you do not see this version or a newer version than this one, please contact Evisions technical support.

- 4.5 Once you have accepted the default or typed in the version to compile, you will be prompted with the following:

Choose the operation to perform:

- A. Compile/Execute all
 1. Execute "sh comppcl.shl"
 2. Compile "evilp"
- X. Exit this menu

Select option **A** unless Evisions Technical Support provides you with other instructions.

The **eviadm** program will extract from the database the version you have typed and compile the source code into an **evilp** executable.

NOTE: PLEASE LET US KNOW IF THE COMPILATION DID NOT COMPLETE SUCCESSFULLY. WE MAY BE ABLE TO SPECIFY ADDITIONAL FLAGS TO COMPLETE THE COMPILATION PROPERLY ON YOUR SYSTEM.

You have now completed the upgrade! Since you have previously used FormFusion with Banner, you do not need to modify your **gjajobs** file.



BACKING UP FORMFUSION DATA

There are several methods that can be used to back up data in an Oracle database. The technique we recommend to backup your FormFusion installation is to use the database dump technique, which stores all Oracle data from specific tables into a dump (DMP) file.

On your host server, create a file named **export_ff1_6.par** and add the following text to the file:

```
TABLES=(
  EVIARCHV, EVIARUSR, EVIAUDIT, EVIAUSER, EVIBLOB, EVICFORM, EVICFSQL,
  EVICFVAR, EVICOPY, EVIFDARC, EVIFDDIR, EVIFDEML, EVIFDFAX, EVIFDPRT,
  EVIFDWEB, EVIFONTS, EVIFPCL, EVIFSTMP, EVILOCK, EVIMAPF, EVIMFAFLD,
  EVIMFFLD, EVIMFOFLD, EVIPCLO, EVIPDTAF, EVIPGRP, EVIPIMG, EVIPLGRD,
  EVIPLINE, EVIPMOD, EVIPRECT, EVIPROC, EVIPTEXT, EVISCTP, EVISPP,
  EVISPPVAR, EVIVSORT)
FILE=EXPORT_FF1_6.dmp
GRANTS=N
```

Next run the Oracle export command as shown in the example below.

```
exp evisions/password@PROD parfile=export_ff1_6.par
```

- Depending on the version of Oracle installed, you may have to type exp73, exp80, etc.
- Replace **password** with the password used to log in as the EVISIONS user.
- Replace **PROD** with the database instance you are backing up.
- Edit the PAR file and change the **FILE** line between exports to avoid overwriting previous dumps.

For your convenience and to help avoid potential typing errors, the above PAR file is available on the Evisions website at

http://evisions.com/downloads/export_ff1_6.par.



APPENDIX A: CREATE SEQUENCE

FormFusion creates a sequence in Oracle to generate internal ID numbers. Creating a sequence requires the EVISIONS user to have the corresponding privilege in Oracle. If the EVISIONS user does not have this privilege the following error will occur when importing new templates or making updates to existing templates:

ORA-02289 – sequence does not exist

To fix this problem first grant CREATE SEQUENCE to the EVISIONS user. This will need to be done with a DBA login for Oracle. The following SQL command will grant this privilege:

```
GRANT CREATE SEQUENCE TO EVISIONS
```

Once the EVISIONS user has the CREATE SEQUENCE privilege the following steps will create the sequence.

1. On the FormFusion menu in Developer, click on **Tools** and select **Administration Wizard**.
2. Select the database instance to administer.
3. Now click the **Tables** button. This area of the Administration Wizard will update the existing tables of FormFusion to the newer format. At this point, a prompt will appear to log in as the EVISIONS user.
4. Next, click on the **Create Sequence** button and press **OK** on the window.