

Ancora Verify User Plugin

These directions cover the installation of the plugin required for capturing the Verification user when processing documents through Ancora. You will need this document, the plugin files folder, and Notepad++ is recommended as the files you need to edit are in protected directories, so it's ability to launch as admin and save anyway is convenient.

Installing the Ancora Verify User Plugin on the Ancora Server:

1 - In each of the DFD's for which you would like to capture the Data Verify User data, create a field called "Verify User" with an ID of "FT_VERIFY_USER" There should be no formulas on this field, and the only flag that should be selected is "hidden" to remove it from the user view. Ancora will automatically include the "Assignable" flag, so be sure to remove that before saving the DFD.

2 - Stop the Ancora Server service (EPICOR IDC Server) in the Windows Services panel.

3 - Copy data below into the **SsiServer.exe.config** file located in:

C:\Program Files (x86)\EPICOR IDC\EPICOR IDC Server

```
<runtime>
    <assemblyBinding xmlns="urn:schemas-microsoft-com:asm.v1">
        <probing privatePath=".\\Plugins\\WorkStepsPlugin\\Bin"/>
    </assemblyBinding>
</runtime>
```

The lines should be copied after the final </WorkflowConfig> tags, right before the </configuration> tag. Note: you might just need to update the default values in some versions.

4 - Copy template folder "Plugins" to:

C:\Program Files (x86)\EPICOR IDC\EPICOR IDC Server\Plugins

5 - Edit the **workflow-config.xml** file located in:

C:\Program Files (x86)\EPICOR IDC\EPICOR IDC Server\Plugins\WorkStepsPlugin\Config

Somewhere in the realm of line 6 there will be a couple connection strings. The second connection string "AncoraDbDefault" should be updated with the database location and credentials required to access the IDC Server Database. Save and close the file when you have finished inserting the credentials.

6 - Finally, access the path below:

*C:\Program Files (x86)\EPICOR IDC\EPICOR IDC
Server\Plugins\WorkStepsPlugin\Config\Default*

Rename the “Template” folder to the name of your Batch Type. For any additional Batch Types, create a copy of the template folder and name it until you have a folder matching each of the Batch Types you would like to enable this feature on.

Testing the Ancora Plugin:

Once you have completed the installation following the directions above, access the following path and launch the **SsiServer.exe** file as administrator. This application runs the Ancora Server in a command prompt window which we can capture from to check for any errors.

C:\Program Files (x86)\EPICOR IDC\EPICOR IDC Server

Disable the EPICOR Import by turning off the automatic import in the EPICOR Client application and then restarting the Eclipse Automation Service.

Import a file into Ancora and process it. Once you are done click submit and look for it in the normal export location. The XML file should contain the field we created. Use the XML field to map the data to the correct EPICOR field, and then restart the import process so files will again flow freely into EPICOR.

Once you have repeated testing for each document type, and added the field mapping for each EPICOR import, you can close the SsiServer.exe window and restart the normal Ancora Server Service (EPICOR IDC Server) in Windows. You're now good to go.