Tungsten AP Agility
Merging Transformation Project Customizations
Best Practices Guide

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TUNGSTEN
AUTOMATION

Table of Contents

Preface

This guide describes the recommended best practices that you should follow while using Tungsten AP Agility and working with subclasses to improve extraction performance.

Related documentation

The full product document set for Tungsten AP Agility is available here:

https://docshield.tungstenautomation.com/Portal/Products/APAgility/2025.1-j1u9a8a63z/APAgility.htm

The product document set for Tungsten TotalAgility is available for the following supported versions:
- 7.9.0
- 7.10.0
- 7.11.0
- 8.0.0
- 8.1.0

Select the documentation link for the Tungsten TotalAgility version that you are currently using.

If you select the incorrect link, it is possible that some features documented are not in your installed version.

In addition to this guide, the AP Agility document set includes the following items:

Tungsten AP Agility Release Notes

This guide contains late-breaking product information that may not be included in other Tungsten AP Agility documentation. Release notes are also available for each of your installed Tungsten Automation applications.

Tungsten AP Agility Installation Guide

This guide provides instructions for installing Tungsten AP Agility and integrating it with Tungsten TotalAgility.

For more information about installing Tungsten TotalAgility refer to *Tungsten TotalAgility Installation Guide*

Tungsten AP Agility On-Premise Multi-Tenant Installation Guide

This guide provides information about installing the on-premise components you may needed to get Tungsten AP Agility to work in a multi-tenant TotalAgility environment or a Tungsten Automation hosted TotalAgility Azure environment.

Tungsten AP Agility Configuration Help

This help provides detailed information on how to configure Tungsten AP Agility for your environment.

Tungsten AP Agility PIX Correction activity Help

This help provides detailed information about how to navigate through the PIX Correction activity. It also includes details about how to use the PIX Correction activity when processing documents with Tungsten AP Agility Invoice Processing.

Tungsten AP Agility Scan activity Help

This help provides information on how to scan documents for Tungsten AP Agility Invoice Processing.

Tungsten AP Agility Line Pairing Correction activity

This help provides use cases and examples for correcting a document that fails line pairing during Invoice Processing.

Tungsten AP Agility Validation activity Help

This help provides information about validating a document in Tungsten AP Agility Invoice Processing.

Additional documentation about validating documents is available in the *Tungsten TotalAgility Validation activity Help*.

Tungsten AP Agility Error Handling Help

This helps provides information on how to handle documents that end up in an error state during Invoice Processing.

Tungsten AP Agility AP Workflow Help

This help provides information about how to use the various activities that are part ofs the AP Agility AP Workflow. This includes general information that is relevant for all activities as well as specific information related to the Approval activity, the Coding activity, the Exception activity, the Line Pairing Exception activity, the Hold activity, and the Comment Request activity.

Analytics for AP Agility Installation Guide

This guide provides information about installing Analytics for AP Agility and integrating it with Tungsten AP Agility.

Analytics for AP Agility Help

This help provides detailed information on how to generate and interpret the various reports that are available in Analytics for AP Agility .

Training

Tungsten Automation offers both on-demand and instructor-led training to help you make the most of your product. To learn more about training courses and schedules, visit the Tungsten Automation Learning Cloud.

Getting help with Tungsten Automation products

The Tungsten Automation Knowledge Portal repository contains articles that are updated on a regular basis to keep you informed about Tungsten Automation products. We encourage you to use the Knowledge Portal to obtain answers to your product questions.

To access the Tungsten Automation Knowledge Portal, go to https:// knowledge.tungstenautomation.com/.

> ⓘ The Tungsten Automation Knowledge Portal is optimized for use with Google Chrome, Mozilla Firefox, or Microsoft Edge.

The Tungsten Automation Knowledge Portal provides:
- Powerful search capabilities to help you quickly locate the information you need.

  Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.

  To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:
- Access the Tungsten Automation Community (for all customers).

  On the Resources menu, click the **Community** link.
- Access the Tungsten Automation Customer Portal (for eligible customers).

  Go to the Support Portal Information page and click **Log in to the Customer Portal**.
- Access the Tungsten Automation Partner Portal (for eligible partners).

  Go to the Support Portal Information page and click **Log in to the Partner Portal**.
- Access Tungsten Automation support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

  Go to the Support Details page and select the appropriate article.

Chapter 1

Overview

Upgrading Tungsten AP Agility is relatively straightforward. You can install the new version over top of the existing version.

However, if you have made any customizations to the InvoiceProcessignAgility shared project in the Transformation Designer, some additional manual steps are required to merge your changes.

Chapter 2

Transformation Designer project customizations

In most cases, changes to the project in Transformation Designer are required. This is because your organization may have specific requirements that are not available in the out-of-the-box solution.

The following guidelines should be met when customizing your project. These guidelines ensure that any customizations are still available in future versions of Tungsten AP Agility.

> ℹ️ Keep notes about all changes made to a project. This is so that you can manually redo them if necessary, or to confirm if a future upgrade and merge are successful. Also, before an upgrade is performed, ensure that you have no unsaved customizations in the Transformation Designer project and release the project if necessary.
>
> Save a backup copy of any scripts to a location outside of the Transformation Designer. These are needed after an upgrade.

It is important that you do not delete, move, or rename the following.
- Classes.
- Field Groups.
- Fields.
- Locators.

    If you delete one of these items and then add it back, the internal ID is no longer the same, so the item does not behave as it should.
- All new Classes, Field Groups, Fields, or Locators should have a name that will not conflict with future releases of the solution. For example, add the "Custom_" prefix to all new items.
- Do not remove any Databases, Dictionaries, Recognition Profiles, Table Models, or other dependent settings.
- You can modify Recognition Profiles by adding an additional language.
- Add script below the marking line that says `'Modify script only below this line`. Any modifications above this line can cause problems with the package and are not included in a future merge.
- In script, refer to lookup fields and other items by their name and not by their index IDs. This is because the indexes can change and the names are not likely to change.

Document sets and training sets are included in the merge process. This means that if you have documents in either the classification training set or the extraction straining set, make a copy of them outside of the training folder to ensure that they are not lost during the merge. You can copy them back after the merge.

Merge Transformation Designer project customizations

If you have made changes your Transformation Designer project it is necessary to merge those changes after an upgrade.

You can merge your project by by following these steps:

1. Open the Transformation Designer.
2. On the menu, select **File** > **Merge Local Changes from Previous Version**.
   The **Choose Project Version with Desired Local Changes** window is displayed.
3. Each time a project is released, a new version number is assigned. From the list of versions, select the most recent version and then click **OK**.
   A **Data Transfer** progress window and then the **Comparing Project Version** progress window indicate the merge process. when they are complete, the **Select Items to Merge** window is displayed.
4. In this window, any differences between the old version and the new version are selected automatically.
   Review the selections to ensure that only the changes you have made are selected. Do not revert any locators, table models, or table header pack. When you are done, click **OK**.
   When the merge is complete, click **OK**.
5. Optionally, restore any custom scripts.
6. If you have made any of the following changes to your project, these were lost with the merge. Redo these changes as appropriate.
   - Tungsten Search and Matching Server database configurations
   - Searchable columns in ASE databases
   - If you have added any custom fields, regenerate and then edit the validation form to include the additional custom fields.
7. **Release** the project.
   The merges from the older project are saved and available in the newly released project.
8. Test the released project to ensure that it works as expected.