

Course Exercises Guide

# IBM Datacap 9.0.1: Introduction

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# Unit 1. Introduction to Datacap

## Estimated time

07:00 hours

## Unit overview

This unit contains these lessons.

### Lessons

[Lesson 1.1, "Datacap overview," on page 1-3](#)

[Lesson 1.2, "Datacap process," on page 1-5](#)

[Lesson 1.3, "Role-based Datacap clients," on page 1-7](#)

[Lesson 1.4, "Architecture configurations," on page 1-9](#)

[Lesson 1.5, "Architecture components," on page 1-11](#)

[Lesson 1.6, "Datacap Desktop," on page 1-14](#)

[Lesson 1.7, "Application design," on page 1-18](#)

[Lesson 1.8, "Introduction to Datacap Navigator," on page 1-27](#)

[Lesson 1.9, "Datacap web client \(Optional\)," on page 1-40](#)

### Requirements

The activities in this unit assume that you have access to the student systems configured for these activities.

### Do this first



#### Important

If your student system contains two VMWare images, for this course, use the Server image for all the lab exercises.

1. If you are prompted to log in to the system, use:

Type	User ID	Password
Operating system	Administrator	passw0rd

2. Start the Datacap Server.
  - a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.  
The Datacap Server Manager window is shown.
  - b. Click the Service tab.
  - c. Click Start in the lower left corner, to start the Datacap Server Service if it is not already started. The Start operation is disabled if it is already started.
  - d. When the status changes to running, click Close to close the Datacap Server Manager window.
3. Start WebSphere.
  - a. Open the "WebSphere Admin" folder on the Desktop.
  - b. Double-click the Start Server1.bat script file. It takes a few minutes for the Startup script to complete. When it is finished the command window closes.  
It starts the IBM FileNet Content Manager, and the Content Navigator.

## System check

The activities in this unit assume that all system services are running when you begin an activity session. Perform a system check whenever you start an IBM FileNet Content Manager system or start working on a system that is in an unknown state.

Use procedures in Appendix A to check the following components:

1. P8 Content Platform Engine  
Procedure 2, "Check the Content Engine," on page A-4
2. IBM Content Navigator  
Procedure 1, "Start student system components," on page A-2
3. Datacap Content Navigator  
Procedure 2, "Start Datacap Server," on page A-2
4. See Appendix A for additional procedures to Start, Check, and Restart components on the Student system.

# Lesson 1.1. Datacap overview

## Overview

### Why is this lesson important to you?

This lesson provides an overview of the business solution that IBM Datacap provides, and its capabilities.

## Activities

- Quiz 1: Datacap overview, on page 1-4

## Quiz 1: Datacap overview

For each question, indicate the correct answer or mark the statement True or False.

1. Datacap supports both structured and unstructured documents.

**True or False**

2. Which of the following descriptions apply to IBM Datacap? Select more than one option. Circle all that apply.
    - a. Automates capturing documents and the extraction of appropriate data.
    - b. Improves efficiency and optimizes business processes.
    - c. Supports compliance and Risk mitigation.
    - d. Reduces costs and speeds up the response.
    - e. Improves customer service.
- 



**Note**

Refer to Appendix , "Lesson 1.1. Datacap overview: Quiz," on page 1-46 for answer keys to the questions.

---



# Lesson 1.2. Datacap process

## Overview

### Why is this lesson important to you?

This lesson provides an overview of Datacap process.

## Activities

- Quiz 1: Datacap process, on page 1-6

## Quiz 1: Datacap process

For each question, indicate the correct answer or mark the statement True or False.

1. The Scanners and Multi-Functional Devices input channels support which of the following file types? Select more than one option. Circle all that apply.
  - a. TIFF
  - b. JPEG
  - c. TXT
  - d. HTML
  - e. PDF
  - f. DOCX
  - g. ZIP
2. Both one- and two-dimensional Barcodes are used for page recognition.

**True or False**

3. Datacap captured documents and data can be exported to content repositories or can be used in applications.

**True or False**

4. Which of the following items are Datacap page identification methods? Select more than one option. Circle all that apply.
  - a. Keyword
  - b. Batch Process
  - c. Pattern recognition
  - d. Fingerprint
  - e. Document export
  - f. Input channel



### Note

Refer to [Appendix , "Lesson 1.2. Datacap process: Quiz,"](#) on page 1-47 for answer keys to the questions.

---

# Lesson 1.3. Role-based Datacap clients

## Overview

### Why is this lesson important to you?

This lesson provides an overview of different Datacap clients for different business roles.

## Activities

- Quiz 1: Role-based Datacap clients, on page 1-8

## Quiz 1: Role-based Datacap clients

For each question, indicate the correct answer or mark the statement True or False.

1. Which one of the following items is not a Datacap client for business users to process a batch?
  - a. Datacap Navigator
  - b. Datacap Mobile
  - c. Datacap Desktop
  - d. Datacap FastDoc
  - e. Datacap Studio
2. Datacap FastDoc can be used to rapidly configure the Datacap applications and as a client to scan and verify the documents.

**True or False**



### Note

Refer to Appendix , "Lesson 1.3. Role-based Datacap clients: Quiz," on page 1-48 for answer keys to the questions.

---

# Lesson 1.4. Architecture configurations

## Overview

### Why is this lesson important to you?

As a Datacap business analyst, application builder, or administrator you are involved in the configuring or maintaining your Datacap Capture system.

To do these tasks effectively, you must be familiar with the Datacap system components and architecture of the configuration variations for a Datacap Capture system.

## Activities

- Quiz 1: Identify architecture configuration, on page 1-10

## Quiz 1: Identify architecture configuration

For each question, indicate the correct answer or mark the statement True or False.

1. Many production Datacap installations can be configured with a Single system configuration.

**True or False**

2. The most efficient and cost effective Datacap installations are client/server configurations where all software components are installed on dedicated servers.

**True or False**

3. Most production Datacap systems have some Datacap components that are installed on dedicated systems and some components on shared systems.

**True or False**

4. Consider the terms "Centralized Deployment" and "Distributed deployment". Which of the following statements is correct.
  - a. Centralized and Distributed refer to how Datacap components are deployed across servers in a Datacap configuration.
  - b. Centralized and Distributed refer to geographic location of Datacap services and tasks.
5. Consider the scenario where all of the Datacap services are provided by servers that are in a single-server room. Scanning and verification tasks are done from a workstation or scanning stations throughout multiple buildings at the same physical address and all connected to the same LAN. What is the classification for this scenario?
  - a. Centralized.
  - b. Decentralized.
6. Consider the scenario where all of the Datacap servers are at one physical location. Scanning and verification tasks are done from the location and from remote locations that are connected over the Internet. What is the classification for this scenario?
  - a. Centralized.
  - b. Decentralized.



### Note

Refer to [Appendix , "Lesson 1.4. Identify architecture configuration: Quiz,"](#) on page 1-49 for answer keys to the questions.

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# Lesson 1.5. Architecture components

## Overview

### Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system and communicate solution details to the solution architect, administrator, and users.

To do these tasks effectively, you must be familiar with the Datacap system components and architecture of the configuration variations for a Datacap Capture system.

## Activities

- [Quiz 1: Identify architecture components](#), on page 1-12

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin



### Note

Passwords are always case-sensitive.

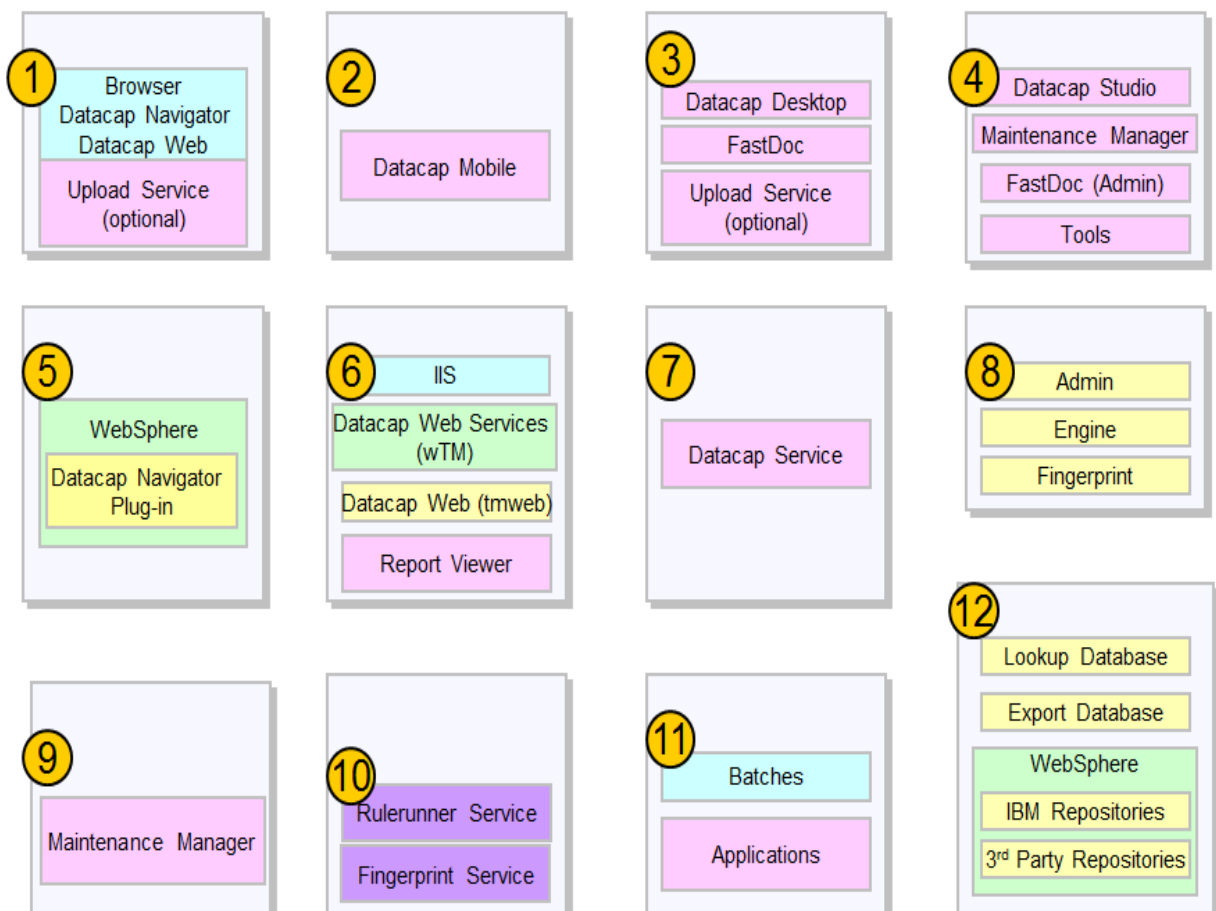
---

## Quiz 1: Identify architecture components

In the following table, enter the number that corresponds to the Datacap component name from the following Datacap system architecture diagram.

Number	Datacap component name	Number	Datacap component name
	Developer Workstation		Web Client Workstation
	Datacap Navigator Server		Datacap Web Server
	Database Server		Maintenance Manager Server
	Datacap Client Workstation		Mobile Device
	File Server		Datacap Server
	Rulerunner Server and Fingerprint Services Server		External Systems

Diagram of Datacap system architecture.



### Note

Refer to Appendix , "Lesson 1.5. Identify architecture components: Quiz," on page 1-50 for answer keys to the questions.





# Lesson 1.6. Datacap Desktop

## Overview

### Why is this lesson important to you?

As a Datacap business analyst, you create capture workflows that are processed with the Datacap Desktop Client.

To do these tasks effectively, you must be familiar with the Datacap Desktop client.

## Activities

- [Exercise 1: Explore the Datacap Desktop interface](#), on page 1-15

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin



### Note

Passwords are always case-sensitive.

---

# Exercise 1: Explore the Datacap Desktop interface

## Introduction

In this activity, you open Datacap Desktop, and explore the client user interface.

## Procedures

Procedure 1, "Open the Datacap Desktop," on page 1-15

Procedure 2, "Explore the Monitor view," on page 1-16

Procedure 3, "View Batch process shortcuts," on page 1-17

If for any reason the image was restarted or the WebSphere Server and the Datacap Manager server are not running, follow the instructions at the beginning of the unit under the heading "Do this first" to restart these services.

### ***Procedure 1: Open the Datacap Desktop***

1. Log in to Datacap Desktop.
  - a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop.  
 You can also use the "Datacap Desktop" shortcut on the Windows desktop.
  - b. Enter the following values for the authentication fields:
    - User ID: `admin`
    - Password: `admin`
    - Station ID: `1`
  - c. Click Start.
2. Select an Application to process.
  - a. From the upper left, click the list under "Applications", and select an application to view.  
 Example: `ExpenseDemo`



### **Troubleshooting**

`Expense8` application is not configured for this lesson. You can select all applications except `Expense8`.

---

3. Observe the "Task Shortcuts" in the left pane.
  - a. Notice that the "All" and "Background" shortcuts are visible.
  - b. Select different applications from the list.
  - c. Notice that the rest of the shortcuts vary based on what Tasks are defined in the application.

## Procedure 2: Explore the Monitor view

In this procedure, you explore the Monitor view of the Datacap Desktop.

1. Select the `ExpenseDemo` Application.
  - a. Click the “All” shortcut from the left pane.
  - b. In the right pane, a list of batches for the selected application is shown.
  - c. It provides a Monitor view for the batches. You can customize this view.
2. The “Status” column shows the status for a task as an icon, and the “Task” column specifies the task at which the batch is currently pending.
  - a. Hover over the status icon in the table to see the status name. Example: pending or hold.
3. Select (single click) a batch in the middle pane to preview.
  - a. The details for the batch are shown in the rightmost pane.



- b. The preview has two tabs: Details and Page View.
- c. Select each tab and check the display.

Resize or collapse the preview pane with the control at the upper right of the pane.



### Note

If you double-click the item, the item gets processed.

4. Adjust the column size and position.
  - a. Drag the individual column by header to change its relative position in the table.
  - b. Click a column header to sort by that column.
5. Specify which columns to show and clear the columns that you want to hide.
  - a. Click the “Select Columns” list.
  - b. Clear the following columns: “DCO File” and “Task Time”.
  - c. Verify that the columns that you cleared are not visible.
6. Filter the list with the filter criteria.
  - a. Select a value for the “Filter” field (Example: `Queue ID`).
  - b. Enter a value that is available in Queue ID column, (Example: `177`) in the “By” field. Then, press Enter.
  - c. Check that only one item with the specified Queue ID is shown.
  - d. Optionally, test another criterion (`Task = Verify`).

**Procedure 3: View Batch process shortcuts**

1. Select the `ExpenseDemo` Application to process.
  - a. From the upper left, click the list under “Applications”, and select an application to view.

Example: `ExpenseDemo`

2. Select “VScan” from the left pane.
  - a. A new batch is opened, and you are prompted to select images to scan.
  - b. Scroll down and click Cancel to go back to the main page.
  - c. Click OK when you get the message that the Batch is canceled.
  - d. Click Stop to stay on the main page.
3. Leave the Datacap Desktop window for the next lesson.

**Note**

You are going to process a batch in Datacap Desktop in the Application Design lesson.

---

# Lesson 1.7. Application design

## Overview

### Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system and communicate solution details to the solution architect, administrator, and users.

To do these tasks effectively, you must be familiar with the design principles for the Datacap Application and how to process a batch.

## Activities

- Exercise 1: Scan and process a batch, on page 1-19

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap Desktop	admin	admin



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Scan and process a batch

### Introduction

This activity gives you the knowledge to Process a document batch in Datacap Desktop client.

### Procedures

Procedure 1, "Run the VScan Task," on page 1-19

Procedure 2, "Run Profiler Task," on page 1-21

Procedure 3, "Review the Profiler Task Output," on page 1-21

Procedure 4, "Run the Verify Task," on page 1-22

Procedure 5, "Review the Verify Task Output," on page 1-22

Procedure 6, "Run the Export Task," on page 1-23

### ***Procedure 1: Run the VScan Task***

The task in this procedure completes the page input.

1. If the Datacap Desktop is already opened from the previous lesson, skip to step 3.
2. Log in to Datacap Desktop.
  - a. Click Start > Programs > IBM Datacap Clients > Datacap Desktop.
  - b. Enter the following values for the authentication fields:
 

User ID: `admin`

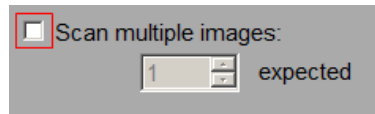
Password: `admin`

Station ID: `1`
  - c. Click Start.
3. Select an Application to process.
  - a. Select `ExpenseDemo` from the Applications list at the top of the left panel.
4. Scan a batch.
  - a. Select "VScan" from the Shortcut list.
  - b. Click the "Browse for Files to import" icon in the top of the middle pane.



- c. Go to `C:\DC9-Lab Exercises\Expense`
- d. Select the `car1.tif` image and click Open.

- e. Clear the “Scan multiple images” option.



### Note

If you select only one image, and select the “Scan multiple images” option (“expected”=0), it scans all of the images in the folder. If you select multiple images, the “Scan multiple images” option is selected automatically. The expected field is set to the number of the images that you selected.

- f. Click Scan.
- g. Verify that the image details are listed in the “Batch View” on the rightmost pane.
- h. The image is shown in the “Image View” on the leftmost pane.
5. Complete the batch scan.
  - a. Scroll down and click Submit.
  - b. Click OK to acknowledge the message that the Batch is completed.
6. Click Stop to stay on the main page.
  - a. Leave the Datacap Desktop open for the other procedures.

## Review the Scan Task Output

7. View results in the Batches folder:
  - a. Open Windows Explorer, go to the batches folder C:\Datacap\ExpenseDemo\batches.
  - b. Verify that the batch that you scanned created a folder with a name that has today’s date in this format: <date.00000N> where N is a number.  
 Example: 20150105.00000N
8. Check the VScan.xml file for the <date.00000N> batch.
  - a. Open the <date.00000N> batch folder.
  - b. Double-click the VScan.xml file to open it in a browser.
  - c. Click “Yes”, if you are prompted to allow the scripts to run.
  - d. Verify that the page you scanned is identified.
    - The Batch Type is “Expenses”.
    - The Document Type is not set yet.
    - The page type is “Other”.
  - e. Close the browser tab.



## Procedure 2: Run Profiler Task

The task in this procedure completes the page identification and document assembly.

1. Click the “All” shortcut from the Task Shortcut list in Datacap Desktop.
  - a. Select the batch that you created with today’s date and time. The Task name is “Profiler”.
  - b. Double-click the batch to process it.
  - c. Click OK to acknowledge the message that the Batch is finished.
2. The “All” shortcut is already selected. Verify that your batch is moved to “Verify” task.
3. Leave the Datacap Desktop open for the other procedures.



### Note

To run the “Profiler” task for all the pending batches, click the “Profiler” shortcut from the Task shortcut list. It automatically processes the pending batches. The user has options to stop a particular batch or to continue to process each of the next pending batches.

## Procedure 3: Review the Profiler Task Output

1. Open Windows Explorer and go to the C:\Datacap\ExpenseDemo\batches folder.
2. Check the Profiler.xml file for the <date.00000N> batch.
  - a. Open the <date.00000N> batch folder.
  - b. Double-click the Profiler.xml file to open it in a browser.
  - c. Click “Yes”, if you are prompted to allow the scripts to run.
3. Verify that the page type is identified as Rental\_Agreement.
4. Verify that the document type is identified as Car for the Rental\_Agreement page.

<b>B</b>	<b>20150105.000002</b>
TYPE :	Expenses
STATUS :	0
ScanOperator :	admin
ScanStation :	1
<b>D</b>	<b>20150105.000002.01</b>
TYPE :	Car
STATUS :	0
<b>P</b>	<b>TM000001</b>
TYPE :	Rental_Agreement
STATUS :	0

5. Close the browser tab.

## Procedure 4: Run the Verify Task

The task in this procedure completes the data validation and verification.

1. Click the “All” shortcut from the Task Shortcut list in Datacap Desktop.
  - a. Select the batch that you processed with today’s date and time. The Task name is “Verify”.
  - b. Double-click the batch to process it. You see the verify panel with field names and values.
    - You should not see any error here if you used the car image. There will be a green check mark next to each field.
    - If there were any errors or warnings they would likely be because of field validation errors or the character confidence threshold was exceeded for one or more characters.
    - You would validate and correct any errors and then click Submit.
  - c. Scroll down and click Submit.
  - d. Click OK to acknowledge the message “Validations failed. Override and continue?”.
 

Note: You see in the next procedure why the validation failed message was raised.
  - e. Click OK to acknowledge the message “All documents are complete. Finish Batch?”.
  - f. Click OK to acknowledge the message that the Batch is finished.
2. The “All” shortcut is already selected. Verify that your batch is moved to “Export” task.
3. Leave the Datacap Desktop open for the other procedures.



### Note

To run the “Verify” task for all the pending batches, click the “Verify/Fix” shortcut from the Task shortcut list.

---

## Procedure 5: Review the Verify Task Output

1. In Windows Explorer, go to the C:\Datacap\ExpenseDemo\batches folder.
  - a. Open the <date.00000N> folder.
2. Check the Verify.xml file for Batch <date.00000N>.
  - a. Double-click the Verify.xml file to open it in a browser.
  - b. Click “Yes”, if you are prompted to allow the scripts to run.
  - c. Verify that the DATAFILE field has a value: tm00000n.xml
 

Example: tm000001.xml
  - d. Close the file.

## Procedure 6: Run the Export Task

The task in this procedure completes the export of the data to a FileNet Content Manager repository.

1. Click the “All” shortcut from the Task Shortcut list in Datacap Desktop.
  - a. Select the batch that you processed with today’s date and time. The Task name is “Export”.
  - b. Double-click the batch to process it. It automatically processes the batch.
  - c. Click OK to acknowledge the Batch is completed message.
2. The “All” shortcut is already selected. Verify that your batch is removed from the list because all the processes are completed for your batch.
3. If the Export task completes successfully, go to step 5.
4. If the Export step fails it might be because the P8Admin password needs to be set.
  - a. Open the Datacap Application Manager from the desktop icon.
  - b. Select ExpenseDemo in the application column.
  - c. Click the Custom values tab.
  - d. For FileNetPassword Advanced value, type the password IBMFileNetP8.
  - e. Return to procedure 1 step 4 and process another batch to verify that the Export now works.
5. Close Datacap Desktop.



### Note

To run the “Export” task for all the pending batches, click the “Export” shortcut from the Task shortcut list. It automatically processes the pending batches. The user has options to stop a particular batch or to continue to process each of the next pending batches.

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## Review the Export Task Output

6. In Windows Explorer, go to the C:\Datacap\ExpenseDemo\batches folder.
  - a. Open the <date.00000N> folder.
7. Check the Export.xml file for Batch <date.00000N>.
  - a. Double-click the `Export.xml` file to open it in a browser.
  - b. Click “Yes”, if you are prompted to allow the scripts to run.
  - c. Verify that the `FILEUPLOADED` entry has a value for the location of an pdf file.
  - d. Close the browser tab.
8. In the same folder as in Step 1a, check that a pdf file that contains your batch name is created.

## Check the export in the repository

9. In the Internet Explorer browser, open the Datacap Navigator for business users.

a. Click the “DCN-Datacap” shortcut or enter the following URL:

`http://ecmedu01:9080/navigator/?desktop=datacap`

b. Enter the following values:

User ID: `admin`

Password: `admin`

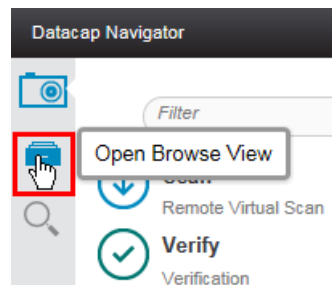
c. Click Login. The Datacap view opens.



### Note

The Datacap Navigator on the student image is configured to show the Browse and Search features; you can check the documents (that are exported into the repositories) directly in Datacap Navigator.

10. Click the “Browse View” icon (cabinet icon) on the left pane.



11. Login to the DCExport repository.

User ID: `P8Admin`

Password: `IBMFileNetP8`

12. Select the “DCExport” repository > “Expenses” folder from the left pane.

13. Verify that you have an item that is listed with today’s date, and with the name: “MILLARD BRYAN” on the right pane.

a. Click the document to see the properties in the rightmost pane.

b. Verify that the properties contain values that were extracted from the scan image.

The screen capture shows the document that is added to the repository, in Datacap Navigator.

The screenshot shows the Datacap Navigator interface. On the left, a folder tree under 'DCExport' highlights the 'Expenses' folder. The main pane shows a list of documents, with '20150520.000010-CarRental-MILLARD BRYAN' selected. A purple-bordered inset table displays the following data:

?	Name	Value
✓	Receipt_Number	703142974
✓	Name	MILLARD BRYAN
✓	Pickup_Date	04/18/10
✓	Total	260.05
✓	Miles	174

On the right, a 'Properties' panel shows the following details:

Class:	Expenses
Document Title:	20150520.000010-MILLARD BRYAN
Date:	4/17/2010, 8:00 AM
Employee_Name:	MILLARD BRYAN
ReferenceNumber:	703142974
Total:	260.05



### Note

The inset diagram in purple is a screen capture from the Datacap Desktop (Verify step) for comparison. It shows the values that are extracted from the original image.

14. Double-click the document to open it and view the stored image in the viewer.



### Troubleshooting

You might see an error message warning about a CIWEB1014 error. It is a security issue that only exists on this test image but the document content is still displayed. You will not see this problem on your production systems.

You might also be prompted for “Java Update Needed”. Select “Do not ask again...” option, and click “Later”.

Datacap Navigator - Viewer

MILLARD BRYAN x

Thank you for renting with  
Rental E-Receipt

Rental Agreement Number: 703142974

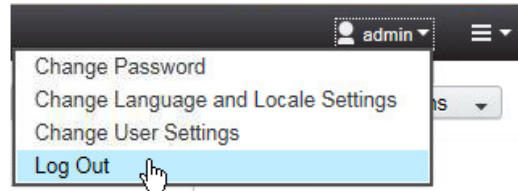
**Rental Car Co.**

Customer Information:		Vehicle Information	
Customer Name:	MILLARD BRYAN	Car Group Rented:	FULL SIZE 4 DOOR
Wizard Number:	***25H	Car Group Charged:	FULL SIZE 4 DOOR
Avis Worldwide Discount Number:	L198397	Car Make Model:	WHI TOYO CAMR 4DR
Customer Status:	Rental Car co. FIRST	Plate Number:	MIN788GTE
Method of Payment:	AMEX	Car Number:	42457553
Credit Card #:	CAXXXXXXXXXX1037	Mileage Out:	5109
		Mileage In:	5283
		Mileage Driven:	174
Freq Traveler:	DL2059946760		

Rental Information	
Pickup Date/Time:	18APR10/2115
Pickup Location:	MINNEAPOLIS-ST. PAUL INTL APO 4850 GLUMACK DR ST PAUL, MN 55111 US 612-726-5229
Return Date/Time:	23APR10/1551
Return Location:	MINNEAPOLIS-ST. PAUL INTL APO 4850 GLUMACK DR ST PAUL, MN 55111 US 612-726-5229

a. Close the image.

15. Log out of Datacap Navigator and close the browser.



# Lesson 1.8. Introduction to Datacap Navigator

## Overview

### Why is this lesson important to you?

As a Datacap business analyst, you test your application workflow tasks in Datacap Navigator.

As a business user, you scan and process your batches in Datacap Navigator.

To do these tasks effectively, you must be familiar with the Datacap Navigator interface and with processing batches.

## Activities

- [Exercise 1: Explore the Datacap Navigator Interface](#), on page 1-28
- [Exercise 2: Process a batch with Datacap Navigator](#), on page 1-33

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Explore the Datacap Navigator Interface

### Introduction

In this activity, you explore the Datacap Navigator client to view the task processing and Job Monitor capabilities.

### Procedures:

Procedure 1, "Start Datacap Navigator," on page 1-28

Procedure 2, "Explore the Datacap Navigator," on page 1-28

Procedure 3, "View batch information," on page 1-29

Procedure 4, "User Settings," on page 1-31

Procedure 5, "Explore the Administrator view," on page 1-32

### **Procedure 1: Start Datacap Navigator**

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
  - a. Click the "DCN-Datacap" shortcut or enter the following URL:
 

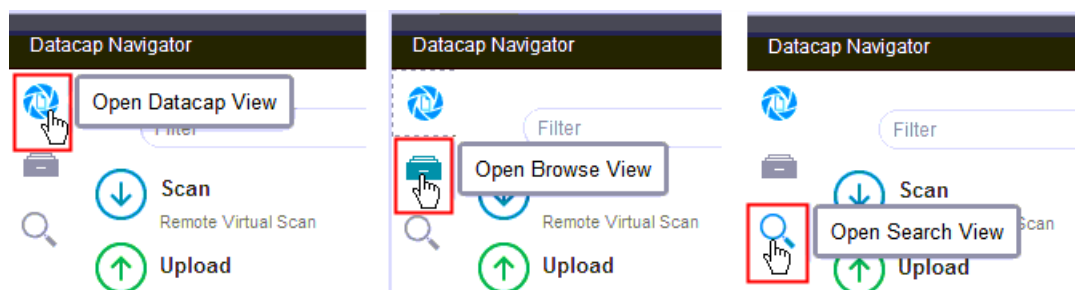
`http://ecmedu01:9080/navigator/?desktop=datacap`
  - b. Enter the following values:
 

User ID: admin

Password: admin
  - c. Click Login. The Datacap view opens.

### **Procedure 2: Explore the Datacap Navigator**

1. Review the main sections in this view.
  - Feature List - Datacap, Browse, and Search views
  - a. Hover over each icon in the leftmost pane to identify them.



2. In "Datacap View", explore the shortcuts for different tasks in the Shortcut pane.
  - Navigator Scan, Upload, Verify, and FixUp



3. In “Datacap View” > “Job Monitor”, a list of batches are shown.



### Hint

When you click the “Browse View” icon (cabinet icon) or “Search View” icon (magnifying glass icon) on the left pane, you are prompted to log in to the IBM FileNet Content Manager repository.

4. Log in to the DCEExport repository.

User ID: P8Admin

Password: IBMFileNetP8

5. Select the “DCEExport” repository > “Expenses” folder from the left pane to view.

6. Leave Datacap Navigator open for the next procedure.

## Procedure 3: View batch information

1. In “Datacap View”, select an Application to process.
  - a. In the banner, to the left of the logged in user, verify or select `TravelDocs` from the Applications list.
2. In “Datacap View” > “Job Monitor”, select (single click) a batch in the Job Monitor list.



### Note

If you double-click an item, it opens for processing.

3. Check that a preview of the scanned image is shown on the right side of the page.
4. Verify that Properties pane displays on the right side of the page.
  - a. Click the blue triangle next to “System Properties” to expand the section and show the detailed information for the selected batch.
  - b. Collapse and expand the Properties pane with the control (gray triangles at the edge of the panes).
  - c. You can also click and hold the edge of the panes, and drag to resize the width.
5. Adjust the batch information columns.
  - a. Click a column header to sort by that column.




### Note

Which columns to show, and what column order can be configured for each application. Your administrator can customize the columns for the Datacap repository in Content Navigator administration desktop.

## 6. View the batch history.

- a. Select (single click) a batch in the Job Monitor list, and click “View History” from the menu bar.
- b. Batch history opens in a separate window.
- c. Depending on the task step that batch is at, the history details vary.

Batch history for 20141205.000000 

Task	Station	Operator	Start Time	Run Time
Scan	1	admin	12/5/2014 2:12:40 PM	1419
NUpload	1	admin	12/5/2014 2:15:34 PM	4
PageID	1	admin	12/5/2014 2:30:22 PM	3
NProfiler	1	admin	12/5/2014 2:30:25 PM	0
NVerify	1	admin	12/5/2014 2:30:54 PM	68
Export	1	admin	12/5/2014 5:02:09 PM	0

- d. Click Close to close the window.

## 7. Filter the job list with the filter criteria.

- a. Type a value from the “Task” column, in the “Filter” field (Example: `Export`) on the upper right of the page.

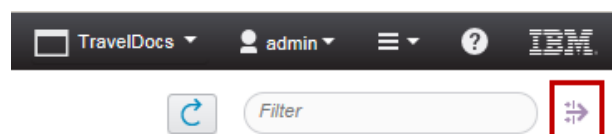
**Important**

The value that you enter must be available in the “Task” column.

- b. Check that only the items with the specified Task are shown.
- c. Optionally, test another criteria for example, a value from the “Status” column (Example: `Job done`)

**Note**

You can do an advanced filtering by clicking the arrow icon next to the Filter field.



8. Select a different Application.
  - a. In the banner, select `ExpenseDemo` from the Applications list.
  - b. You might be prompted to log in.
 

User ID: `admin`

Password: `admin`
  - c. Click Login. The Datacap Batch Monitor view opens.
  - d. Verify that a list of batches are shown.
  - e. The Job column shows “Main Job”.



### Note

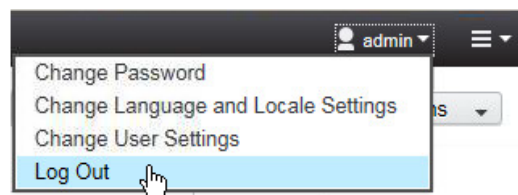
On the student image, some batches are processed in Datacap Desktop for the “ExpenseDemo” application. Those batches are listed in Desktop Navigator when you select the “ExpenseDemo” application. You can monitor the jobs for those batches.

The Task Shortcut pane is not visible for the ExpenseDemo application because this application is not configured to process in Datacap Navigator. In another course, you are going to configure this application to include a Navigator Job with compatible tasks profiles.

## Procedure 4: User Settings

Business users can change the settings.

1. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.
2. In the “Global” tab, observe that you can configure to hide the following features.
  - Title bar for all the widgets.
  - Shortcut pane when you start the task.
3. Observe the tabs for each task such as Scan, Upload, Classify, and Verify.
4. Click Cancel to close the window and log out of the Datacap Navigator.
5. Log out the Datacap Navigator and close the browser.



## ***Procedure 5: Explore the Administrator view***

Administrators access this Datacap Navigator view to configure features. The functions available in this view is equivalent to what is available on the tmweb Administrator tab.

1. In the Internet Explorer browser, open the Datacap Navigator for administrators.

a. Click the “DCN-dcAdmin” shortcut or enter the following URL:

`http://ecmedu01:9080/navigator/?desktop=dcadmin`

b. Enter the following values:

User ID: admin

Password: admin

c. Click Login. The Administration view in Datacap Navigator opens.

2. Explore the features that are available in this view.

a. Click each feature in the following list to see the details:

- Workflows
- Groups
- Users
- Stations
- Shortcuts
- Panels

3. Log out the Datacap Navigator and close the browser.



### **Note**

You are going to learn about this view and the administration topics in detail in the Datacap Administration course.

---

## Exercise 2: Process a batch with Datacap Navigator

### Introduction

In this activity, you process a document batch in Datacap Navigator.

### Procedures

Procedure 1, "Scan batches," on page 1-33

Procedure 2, "Review the Upload Task Output," on page 1-36

Procedure 3, "Start Datacap Rulerunner Service," on page 1-36

Procedure 4, "Run the PageID and Profiler Tasks," on page 1-36

Procedure 5, "Run the Verify Task," on page 1-37

Procedure 6, "Review the Verify Task Output," on page 1-38

### ***Procedure 1: Scan batches***

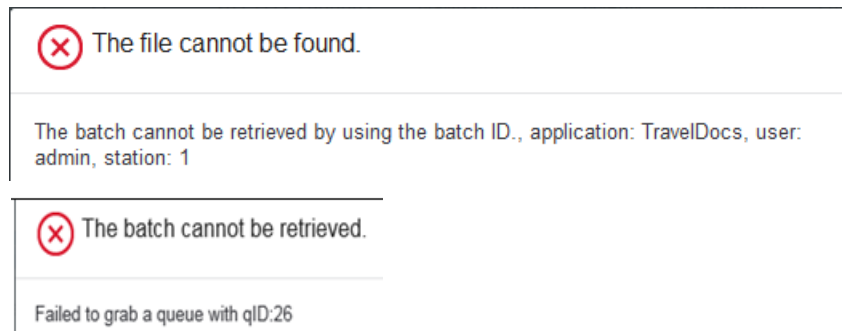
The task in this procedure reads the batch pages.

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
  - a. Click the "DCN-Datacap" shortcut or enter the following URL:  
`http://ecmedu01:9080/navigator/?desktop=datacap`
  - b. Enter the following values:  
User ID: `admin`  
Password: `admin`
  - c. Click Login. The Datacap view opens.
2. In Datacap Navigator, select an Application to process.
  - a. In the banner, verify or select `TravelDocs` from the Applications list.
3. Scan a batch.
  - a. Click "Navigator Scan" (Blue down arrow icon) from the Shortcut list on the left.



## Troubleshooting

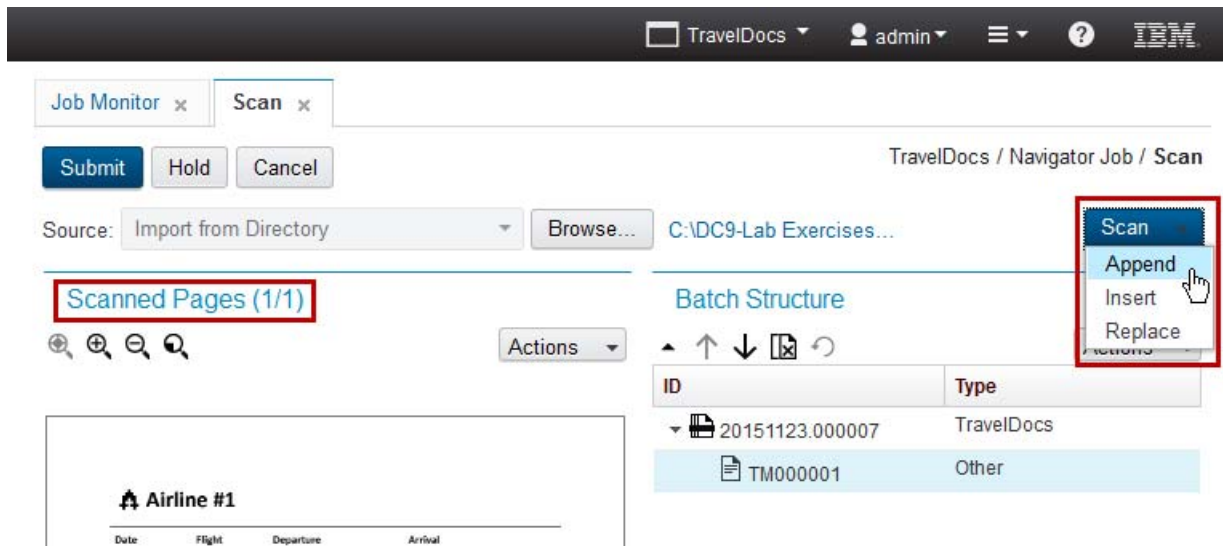
If you are prompted with errors as shown in the following screen captures, click “Close”. Click “Cancel” on the “Scan” tab. Restart the browser and open the Datacap Navigator. Then start the Scan again.



If you are prompted with “Java Update Needed”, select the “Do not ask again...” option and click “Later”.

If you are prompted with any “Security Warning”, select the “Do not show this again...” option and click “Allow”.

- b. Click “Browse” next to the “Source” field.
  - c. In the “Choose File to Upload” window, go to C:\DC9-Lab Exercises\TravelDocs
  - d. Select the `Flight1.tif` image and click Open.
  - e. Click “Scan” at the top-right of the page.
4. Verify that image ID is listed in the “Batch Structure” and the image is shown in the viewer.
5. Rescan an image.
  - a. Click “Browse” next to the “Source” field.
  - b. In the “Choose File to Upload” window, go to C:\DC9-Lab Exercises\TravelDocs
  - c. Select the `Carl.tif` image and click Open.
  - d. Click “Scan” and verify that you have more options in the list (“Append”, “Insert”, or “Replace”).
  - e. You can rescan the image, or scan more images to add to the batch.



- f. Select “Append”, verify that the image is added.

“Scanned Pages(2/2)” shows that there are 2 pages as shown in the following screen capture.



- g. Optionally, test the other options: “Insert” or “Replace”.
6. Click Submit.
7. Notice that the Upload task runs automatically.



### Note

The Upload task uploads the scanned pages to the Datacap Server. The student image is configured to run the “Upload” task automatically.

- h. Leave the Datacap Navigator open for the other procedures.

## Review the Scan Task Output

8. View results in the Batches folder:
- In Windows Explorer, go to the batches folder C:\Datacap\TravelDocs\batches.
  - Verify that the batch that you scanned created a folder with a name that has today's date in this format: <date.00000>.

Example: 201501123.000000

9. Check the nscan.xml file for Batch <date.00000N>.
  - a. Open the <date.00000N> batch folder.
  - b. Double-click the nscan.xml file to open it in Internet Explorer browser.
  - c. Click “Yes”, if you are prompted to allow the scripts to run.
  - d. Verify that the page you scanned is identified.
    - o The Batch Type is “TravelDocs”.
    - o The Document Type is not set yet.
    - o The page type is “Other”.
  - e. Close the browser tab.
10. Leave the Windows Explorer folder open for rest of this lab.

### ***Procedure 2: Review the Upload Task Output***

In the previous procedure, Upload task ran automatically. In this procedure, you review the files that are created.

1. In Windows Explorer, go to the C:\Datacap\TravelDocs\batches folder.
  - a. Open the <date.00000N> folder.
2. Check the nupload.xml file for Batch <date.00000N>.
  - a. Double-click the nupload.xml file to open it in Internet Explorer browser.
  - b. Click “Yes”, if you are prompted to allow the scripts to run.
  - c. The file contains value for the “IMAGEFILE” field.
  - d. Close the browser tab.
3. Leave the Windows Explorer folder open for rest of this lab.

### ***Procedure 3: Start Datacap Rulerunner Service***

1. Click Start > All Programs > IBM Datacap Services > Datacap Rulerunner Manager.
  - a. You can also use the “Datacap Rulerunner Manager” shortcut on the desktop.
2. In the “Datacap Rulerunner Manager” window, select the “Rulerunner” tab.
  - a. If the Status shows that the service is not running, click “Start” to start the server.
 

Note: The Start operation is disabled if it is already started.
  - b. Click Close to close the window.

### ***Procedure 4: Run the PageID and Profiler Tasks***

The two tasks in this procedure complete the page identification and document assembly. Rulerunner is configured to run the PageID, Profiler, and Export task automatically.

1. When you started Rulerunner in the previous procedure the “PageID” and “Profiler” tasks run automatically.



2. In Windows Explorer, in the same batch folder as in the previous procedure, verify that the following two files are located.

PageID.xml  
Profiler.xml

3. Check the PageID.xml file for Batch <date.00000N>.
  - a. Double-click the PageID.xml file to open it in a browser.
  - b. Click “Yes”, if you are prompted to allow the scripts to run.
  - c. Verify that the page type is identified as Air\_Ticket.
  - d. Close the browser tab.
4. Check the Profiler.xml file for Batch <date.00000N>.
  - a. Double-click the Profiler.xml file to open it in a browser.
  - b. Click “Yes”, if you are prompted to allow the scripts to run.
  - c. Verify that the document type is identified as Flight for the Air\_Ticket page.

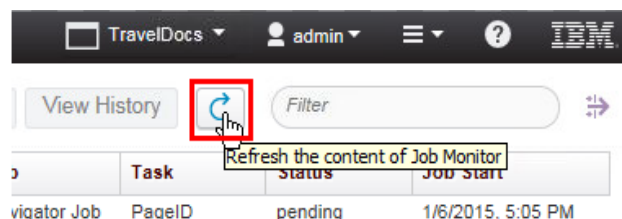
B	20150520.000000
	STATUS : 0
	TYPE : TravelDocs
	NeedsFixup : No
D	20150520.000000.01
	TYPE : Flight
	STATUS : 0
P	TM000001
	STATUS : 1
	TYPE : Air Ticket
	ScanSrcPath : C:\DC9-Lab Exercises\TraveDocs\Flight1.tif

- d. Close the browser tab.

### Procedure 5: Run the Verify Task

The task in this procedure completes the data verification.

1. Refresh the list in the Datacap Navigator Monitor view.



- a. Verify that your batch is now in the pending state for the “Verify” task. The Batch has today’s date.



## Troubleshooting

If there are no exceptions, the batch advances to the “Verify” task after the “PageID” and “Profiler” tasks.

If there are any exceptions in the pages that are scanned, the batch item moves to “NFixUp” step after the “PageID” and “Profiler” tasks.

2. Double-click your batch.

- a. Your batch item is opened in the “Verify” tab.
- b. Click Submit twice (if necessary) to complete the 2 pages.
- c. Click OK to acknowledge the message dialog, “All documents are complete. Do you want to finish batch?”



## Note

To run the “Verify” task for all the pending batches, click the “Verify” shortcut from the Task shortcut list. The user can configure the Datacap Navigator to automatically open the next pending batch in the queue when you submit a current batch.

## Procedure 6: Review the Verify Task Output

1. In Windows Explorer, go to the batches folder C:\Datacap\TravelDocs\batches.
  - a. Open your batch folder.
  - b. Double-click the `verify.xml` file to open it in a browser.
  - c. Click “Yes”, if you are prompted to allow the scripts to run.
  - d. Verify that the DATAFILE field has a value: `tm00000n.xml`

Example: `tm000001.xml`

2. Check the DATAFILE file for the page.
  - a. Click the DATAFILE file link [tm00000n.xml](#) to open it in the browser.
  - b. Click “Yes”, if you are prompted to allow the scripts to run.
  - c. Note all the fields have valid data.
  - d. Close the browser tab.
  - e. Close the Windows Explorer.

**Procedure 7: Check your batch status**

After you complete “Verify” task, your batch moves to the “Export” task. The Export task runs automatically, and the batch is completed.

1. Verify your batch status.
  - a. Refresh the list in the Datacap Navigator Monitor view.
  - b. Check your batch information. The “Task” column has the value: “Export”. The Status column has the value: “Job done”.
2. Logout of the Datacap Navigator.
  - a. Click the down-arrow on the banner area next to the user name and select Log Out.
  - b. Close the Internet Explorer window.

**Procedure 8: Stop Datacap Rulerunner Service**

1. Click Start > All Programs > IBM Datacap Services > Datacap Rulerunner Manager.
  - a. You can also use the “Datacap Rulerunner Manager” shortcut on the desktop.
2. In the “Datacap Rulerunner Manager” window, select the “Rulerunner” tab.
  - a. If the service is running, click “Stop” to stop the server.
  - b. Click Close to close the window.

# Lesson 1.9. Datacap web client (Optional)

## Overview

### Why is this lesson important to you?

As a Datacap business analyst, you test your need to configure and monitor the Datacap system with the Datacap web client.

To do these tasks effectively, you need to be familiar with the Datacap web client interface.

## Activities

- [Exercise 1: Explore the Datacap web client](#), on page 1-41
- [Quiz 1: Datacap web client interface](#), on page 1-44

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Explore the Datacap web client

### Introduction

This activity demonstrates opening Datacap Navigator and views the application configuration, administration, and task processing capabilities. It also demonstrates how Navigator is used as a local processing client and a Datacap Server client.

### Procedures

Procedure 1, "Datacap web client capabilities," on page 1-41

#### ***Procedure 1: Datacap web client capabilities***

1. Log in to tmweb.
  - a. Open the Internet Explorer browser.
  - b. Type URL: `http://ecmedu01/tmweb.net`

Login Credentials:  
 Select an application: TravelDocs  
 User ID: `admin`  
 Password `admin`  
 Station: 1
  - c. Click Login.
2. Operations - Run Shortcuts
  - The operations view is the first view that you see. This view is where you run tasks that are configured to run from the Datacap Web client.
  - These task shortcuts are configured as Web-Job shortcuts on the tmweb > Administrator > Shortcuts view.
  - Only Web Job shortcuts are displayed in the Operations view.
3. Click the Monitor tab.
  - With the top row of controls you can:

Items per page  ▼ Delete batches Filter... Refresh rate  ▼ Default

- Select the Number of batched displayed on a page.
- Delete all batches in this application, irrespective if they are complete or not.
- Configure advanced filter options.
- Refresh the display.
- Select a default refresh rate.
- Set all configuration options back to their default value.

- The second row of controls is column filters.

Batch	Job	Task	Status	Operator	Station
<input type="text"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text" value="v"/>

- Filter by Batch number, Job name, Task name, Batch status, Operator ID, or Station number.
  - The third area is the batch monitor area that shows the properties and status for batches that are active or complete.
  - The fourth area is the column selection area.
- Click the Pages column selection object.
    - Notice that it turns gray and the Pages column disappears from the monitor view.

#### 4. Administrator - Workflow view

- Click the Administrator tab.
  - The view for the Workflow tab is shown.
  - Notice the jobs that are configured for the various clients that are able to process tasks.
  - Main Job for Datacap Desktop and FastDoc
  - Web Job for tmweb
  - Navigator Job for Datacap Navigator.
- Expand the Main Job node.
- Click the VScan task.

There can be only one Batch creation task. It is normally the Scan task.

The program is set to Multiple. This selection means that multiple clients and services can run the task. Example Desktop, FastDoc, and Rulerunner.

- Click Setup.

Verify that you see parameter section for Rulerunner, Desktop, and FastDoc.

- Close the setup window.
- Click the PageID task.

Notice that Program Value is set to Rulerunner.

- Click Setup.

Notice that there is only a Rulerunner and Desktop parameter sections.

- Close the setup window.

#### 5. Administrator - Groups view

- Click the Groups tab.

Selected task details

Name: VScan

Description: Run VScan Rules

Mode: Batch creation

Queue by: None

Store: None

Apply

Parameters

Key	Value
Program	Multiple

Setup...

Compatible tasks: Default set

Copy setup

You can create new groups from scratch or by copying an existing group and modifying it. You can also remove groups.

- b. Click the Everyone group. Notice that you can:
  - Configure group Privileges.
  - Configure Permissions.
  - Select the users that are members of this group.

#### 6. Administrator - Users view

- a. Click the Users tab. Notice that you can:
  - Create new user from scratch.
  - Copying an existing user and modifying it.
  - Remove users.
- b. Click the edit1 user. Notice that you can:
  - Configure user Privileges.
  - Configure Permissions.

#### 7. Administrator - Stations view

- a. Click the Station tab. Notice that you can:
  - Create new stations from scratch.
  - Copying an existing station and modifying it.
  - Remove stations.

A station is just a logical designation that can be used for managing batch flow.

#### 8. Administrator - Shortcuts view

- a. Click the Shortcuts tab. Notice that you can:
  - Create new stations from scratch.
  - Copying an existing station and modifying it.
  - Remove stations.
- b. Click the Verify shortcut.

The permissions determine which tasks are visible for each Job definition.

The user and group permissions set through the User and Group tabs also influence which tasks are visible in the various clients, for processing batches.

#### 9. Logout and close the tmweb window.

- a. Click Logout on the right side of the tab/heading bar.
- b. Click OK to acknowledge the verification message.
- c. Close the tmweb window.

## Quiz 1: Datacap web client interface

For each of the following statements, indicate whether the statement is accurate by marking it True or False. Taskmaster Web Client is abbreviated to tmweb in this exercise.

1. tmweb is the Datacap Capture application development environment.

**True or False**

2. tmweb is one of the capture job processing environments.

**True or False**

3. tmweb provides direct access to the Application Wizard through an icon on the icon bar.

**True or False**

4. tmweb provides the capability to process document batches manually through every task of the capture process.

**True or False**

5. tmweb Client provides the capability to process document batches manually through some task of the capture process.

**True or False**

6. Taskmaster Administrator functions are done on the tmweb > Administrator tab subtabs.

**True or False**

7. Taskmaster Administrator functions are done on the tmweb > Configuration tab subtabs.

**True or False**

8. The tasks on the tmweb > Operations tab are configured on the tmweb > Administrator > Workflow tab and the tmweb > Administrator > Shortcut tabs.

**True or False**



### Note

Refer to Appendix , "Lesson 1.9. Datacap Web Client interface: Quiz," on page 1-51 for answer keys to the questions.

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# Appendix 1. Answer keys to quizzes

This section shows the answer keys to the quizzes that you have done in the above lessons.

## Lesson 1.1. Datacap overview: Quiz

For each question, indicate the correct answer or mark the statement True or False.

1. Datacap supports both structured and unstructured documents.

True or False

**Answer = True**

2. Which of the following descriptions apply to IBM Datacap? Select more than one option. Circle all that apply.
- a. Automates capturing documents and the extraction of appropriate data.
  - b. Improves efficiency and optimizes business processes.
  - c. Supports compliance and Risk mitigation.
  - d. Reduces costs and speeds up the response.
  - e. Improves customer service.

**Answer = a, b, c, d, and e**

## Lesson 1.2. Datacap process: Quiz

For each question, indicate the correct answer or mark the statement True or False.

1. The Scanners and Multi-Functional Devices input channels support which of the following file types? Select more than one option. Circle all that apply.

- a. TIFF
- b. JPEG
- c. TXT
- d. HTML
- e. PDF
- f. DOCX
- g. ZIP

**Answer = a, b, and e**

2. Both one- and two-dimensional Barcodes are used for page recognition.

True or False

**Answer = True**

3. Datacap captured documents and data can be exported to content repositories or can be used in applications.

True or False

**Answer = True**

4. Which of the following items are Datacap page identification methods? Select more than one option. Circle all that apply.

- a. Keyword
- b. Batch Process
- c. Pattern recognition
- d. Fingerprint
- e. Document export
- f. Input channel

**Answer = a, c, and d**

## Lesson 1.3. Role-based Datacap clients: Quiz

For each question, indicate the correct answer or mark the statement True or False.

1. Which one of the following items is not a Datacap client for business users to process a batch?
  - a. Datacap Navigator
  - b. Datacap Mobile
  - c. Datacap Desktop
  - d. Datacap FastDoc
  - e. Datacap Studio

**Answer = e**

2. Datacap FastDoc can be used to rapidly configure the Datacap applications and as a client to scan and verify the documents.

True or False

**Answer = True**

## Lesson 1.4. Identify architecture configuration: Quiz

For each question, indicate the correct answer or mark the statement True or False.

1. Many production Datacap installations can be configured with a Single system configuration.

True or False **Answer = False**

2. The most efficient and cost effective Datacap installations are client/server configurations where all software components are installed on dedicated servers.

True or False **Answer = False**

3. Most production Datacap systems have some Datacap components that are installed on dedicated systems and some components on shared systems.

True or False **Answer = True**

4. Consider the terms “Centralized Deployment” and “Distributed deployment”. Which of the following statements is correct.

- a. Centralized and Distributed refer to how Datacap components are deployed across servers in a Datacap configuration.
- b. Centralized and Distributed refer to geographic location of Datacap services and tasks.

**Answer = b**

5. Consider the scenario where all of the Datacap services are provided by servers that are in a single-server room. Scanning and verification tasks are done from a workstation or scanning stations throughout multiple buildings at the same physical address and all connected to the same LAN. What is the classification for this scenario?

- a. Centralized.
- b. Decentralized.

**Answer = a**

6. Consider the scenario where all of the Datacap servers are at one physical location. Scanning and verification tasks are done from the location and from remote locations that are connected over the Internet. What is the classification for this scenario?

- a. Centralized.
- b. Decentralized.

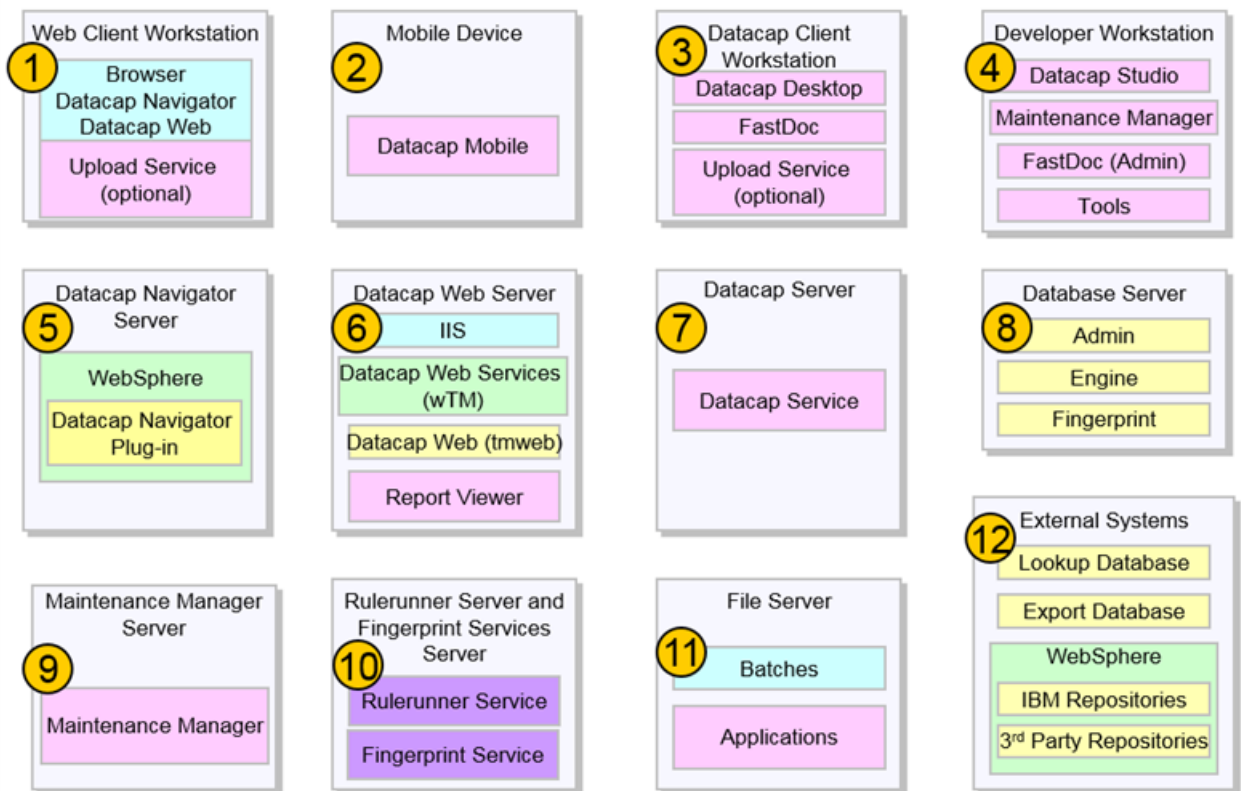
**Answer = b**

## Lesson 1.5. Identify architecture components: Quiz

In the following table, enter the number that corresponds to the Datacap component name from the following Datacap system architecture diagram.

Number	Datacap component name	Number	Datacap component name
4	Developer Workstation	1	Web Client Workstation
5	Datacap Navigator Server	6	Datacap Web Server
8	Database Server	9	Maintenance Manager Server
3	Datacap Client Workstation	2	Mobile Device
11	File Server	7	Datacap Server
10	Rulerunner Server and Fingerprint Services Server	12	External Systems

Diagram of Datacap system architecture.



## Lesson 1.9. Datacap Web Client interface: Quiz

For each of the following statements, indicate whether the statement is accurate by marking it True or False. Taskmaster Web Client is abbreviated to tmweb in this exercise.

1. tmweb is the Datacap Capture application development environment.

True or False

**Answer = False**

2. tmweb is one of the capture job processing environments.

True or False

**Answer = True**

3. tmweb provides direct access to the Application Wizard through an icon on the icon bar.

True or False

**Answer = False**

4. tmweb provides the capability to process document batches manually through every task of the capture process.

True or False

**Answer = False**

5. tmweb Client provides the capability to process document batches manually through some task of the capture process.

True or False

**Answer = True**

6. Taskmaster Administrator functions are done on the tmweb > Administrator tab subtabs.

True or False

**Answer = True**

7. Taskmaster Administrator functions are done on the tmweb > Configuration tab subtabs.

True or False

**Answer = False**

8. The tasks on the tmweb > Operations tab are configured on the tmweb > Administrator > Workflow tab and the tmweb > Administrator > Shortcut tabs.

True or False

**Answer = True**

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# Appendix A. System Check for Your Student System

## Appendix overview

This appendix contains the following activities.

## Activities

Start student system components, on page A-2

Check the WebSphere Application Server, on page A-4

Restart the student system, on page A-7

## System Components

The server image is a Microsoft Server 2008 with an IBM FileNet P8 Platform 5.2.1, IBM Navigator, IBM Datacap 9.0.1 The server image also has Tivoli, DB2, WebSphere Application Server, Visual Studio, installed.

All files that are required for the student activities are on the image.



# Start student system components

## Procedures

Procedure 1, "Start student system components," on page A-2

Procedure 2, "Start Datacap Server," on page A-2

### ***Procedure 1: Start student system components***

1. Start your Server 2008 system:
  - a. Log in as `administrator` user (password: `passw0rd`)

2. Start the WebSphere hosted system components.

There is a WebSphere Admin folder on the image desktop. This folder contains scripts to start stop and manage the WebSphere components. There are WebSphere instances but you use only Server 1 in this class.

Start the WebSphere components by running the start script.

- a. From the image desktop, double-click the `WebSphere Admin Folder`.
- b. Double-click the `Start Server1.bat` script.
- c. A Windows command window opens while the script is running. Wait for the command window to close, which signifies that the WebSphere components are started.

The start process can take several minutes.

- d. The Terminal window closes when the services started.



#### **Information**


The following components are hosted on WebSphere Server1:

- DatacapEDSService
  - FileNetEngine
  - IDSWebApp
  - SampleEDSServices
  - WorkplaceXT
  - Navigator
- 

### ***Procedure 2: Start Datacap Server***

1. Click `Start > All Programs > IBM Datacap Service > Datacap Server Manager`.

The Taskmaster Server Manager window is shown.

2. Click the Service tab.
3. Click the Start icon  to start the The Datacap Taskmaster Server Service if it is not already started. The Start operation is disabled if it is already started.
4. Click Close to close the Taskmaster Server Manager window.

# Check the WebSphere Application Server

## Procedures

Procedure 1, "Check the WebSphere Application Server," on page A-4

Procedure 2, "Check the Content Engine," on page A-4

Procedure 3, "Check the Process Engine," on page A-5

Procedure 4, "Check the Administration Console," on page A-5

Procedure 5, "Check the IBM Navigator," on page A-5

Procedure 6, "Check the Datacap Components," on page A-5

### **Procedure 1: Check the WebSphere Application Server**

1. On your image desktop, double-click the WebSphere Admin folder if it is not already open.
2. Double-click the Administrative console server1 shortcut to go to the WebSphere login window at <https://ecmedu01:9043/ibm/console/logon.jsp>.
3. Log in as p8admin user with IBMFileNetP8 as the password.  
If the WebSphere server is running, the page shows the Integrated Solution Console.  
a. Log out of the Integrated Solutions Console.
4. If an error page is shown instead, the WebSphere is not running. Start it as directed in the procedure Start student system components, on page A-2.
5. Leave the browser open for the next procedure.

### **Procedure 2: Check the Content Engine**

1. In the Internet Explorer browser click Bookmarks > P8 CPE-Ping or enter the following URL:  
<http://ecmedu01:9080/FileNet/Engine>.

Log in using User = p8admin Password = IBMFileNetP8

The Content Engine is running if you get the *Content Engine Startup Context (Ping Page)* page as shown in the following screen capture.

Content Engine Startup Context (Ping Page)	
Key	
Product Name	P8 Content Platform Engine - 5.2.1
Build Version	dap521.234
Operating System	Windows Server 2008 R2 6.1

2. If an error page is shown instead, the Content Engine is not running. Start it as directed in the procedure Start student system components, on page A-2.

### Procedure 3: Check the Process Engine

1. In the Internet Explorer browser click Bookmarks > PE Server-Ping or enter the following URL: <http://ecmedu01:9080/peengine/IOR/ping>.
2. Log in as p8admin with password IBMFileNetP8.

The Process Engine is running if you get the *Process Engine Server Information (Ping Page)* page as shown in the following screen capture.

Process Engine Server Information (Ping Page)	
Key	
Product Name	P8 Content Platform Engine - 5.2.1
Build Version	dap521.234 pe.jar:dap521.234, 10/06/2014 09:32:10
Operating System	Windows Server 2008 R2 6.1 amd64

3. If an error page is shown instead, the Process Engine is not running. Start it as directed in the procedure Start student system components, on page A-2.

### Procedure 4: Check the Administration Console

1. In the Internet Explorer browser click the ACCE-CPE shortcut or enter the following URL: <http://ecmedu01:9080/acce>.
2. Log in as p8admin with password IBMFileNetP8.
3. The Administrative Console for Content Platform Engine is running if the Browse page opens. The page shows a list of Object Stores.
4. If Administrative Console for Content Platform Engine does not open, start it as directed in the procedure Start student system components, on page A-2.

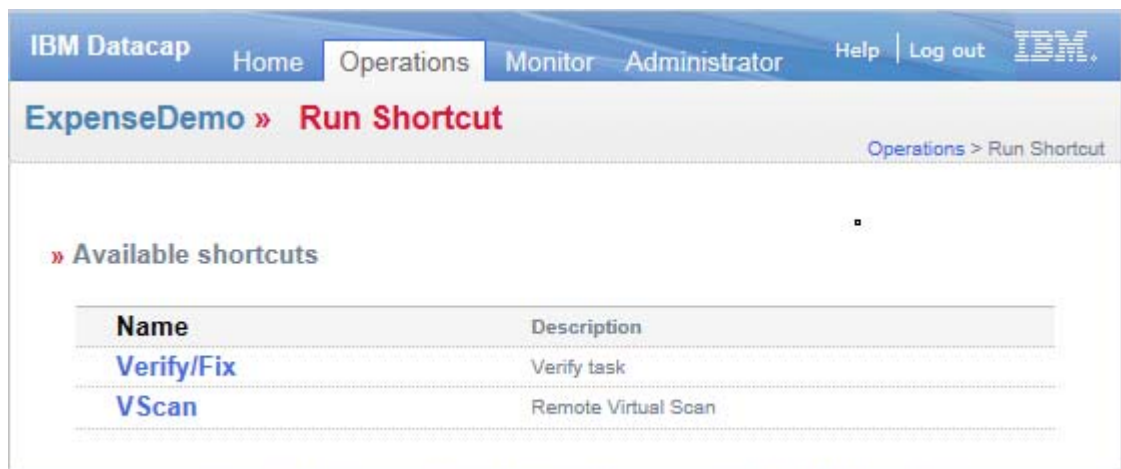
### Procedure 5: Check the IBM Navigator

1. In the Internet Explorer browser click the ICN-ADMIN shortcut or enter the following URL: <http://ecmedu01:9080/navigator>.
2. Log in as p8admin with password IBMFileNetP8.
3. The IBM Content Navigator is running if you get the IBM Content Navigator page.
4. If IBM Content Navigator does not open, start it as directed in the procedure Start student system components, on page A-2.

### Procedure 6: Check the Datacap Components

1. Check Datacap Navigator.
  - a. In Internet Explorer browser click the DCN-Datacap shortcut or enter the following URL: <http://ecmedu01:9080/navigator/?desktop=datacap>.

- b. Log in as `admin` with password `admin`.
  - c. The Datacap Navigator is running if the Datacap Navigator page opens.
2. Check the `tmweb` client.
- a. In the Internet Explorer browser click the `tmweb` shortcut or enter the following URL:  
<http://ecmedu01/tmweb.net>.  
 Select the TravelDocs Application.  
 User ID: `admin`  
 Password: `admin`  
 Station 1
  - b. Click Login.
  - c. The `tmweb` page opens showing the Operations tab view.



- d. If the login fails, it is possible that the Datacap Server Service was not started.
- e. Click log out and close the explorer window.

# Restart the student system

## Procedures

Procedure 1, "Restart the student system (if needed)," on page A-7

Procedure 2, "Start the Content Engine (use only if required)," on page A-7

### ***Procedure 1: Restart the student system (if needed)***


If you need to reboot your student system, do the following steps.

1. Stop the WebSphere hosted system components.

Stop the WebSphere components by running the stop script from the WebSphere Admin folder on the image desktop.

- a. On the desktop, double-click the WebSphere Admin Folder.
- b. Double-click the StopServer1.bat script.
- c. A Windows command window opens while the script is running. Wait for the command window to close.
- d. The Terminal window closes when the components are stopped.

2. Stop the Datacap Server service.

- a. Click Start > All Programs > IBM Datacap Service > Datacap Server Manager.
- b. The Taskmaster Server Manager window is shown.
- c. Click the Service tab.
- d. Click the Stop icon  to start the The Datacap Taskmaster Server Service if it is not already started.
- e. Click Close to close the Taskmaster Server Manager window.

3. Restart the windows server.

- a. Click Start > Restart.
- b. Do Procedure 1, "Start student system components," on page A-2
- c. Do Procedure 2, "Start Datacap Server," on page A-2



### **Important**

Perform the following procedures **only** if you need to manually start individual components. After starting your Server 2008 system, and running Procedure 1, the script should start all of the required components on your student system. If you need to check or start individual WebSphere components do the following procedure.

---

### ***Procedure 2: Start the Content Engine (use only if required)***

1. On your system desktop, double-click the WebSphere Admin folder.

2. Double-click the Administrative console server1 shortcut to go to the WebSphere login window at <https://ecmedu01:9043/ibm/console/logon.jsp>.
3. Log in as `p8admin` user with `IBMFileNetP8` as the password.
4. Expand the Applications > Application Types node in the left pane, and then click WebSphere enterprise applications.

In the right pane, the Content Engine application is listed as `FileNetEngine`.

5. Check the status of the application. If a red X is shown in the Application Status column, the application is stopped.
6. If the `FileNetEngine` application is stopped, select the check box for `FileNetEngine` and click Start.
7. Log out of the console and close the browser.

# Configure Datacap Rulerunner for TravelDocs

## Procedures

### ***Procedure 1: Stop and Connect***

1. Open the Rulerunner Server Service properties.
  - a. Double-click the Rulerunner Server Manager on the desktop.
  - b. Click Stop if the Rulerunner is already started.
  - c. Click the Rulerunner Login tab to display it.
  - d. Select Taskmaster Authentication.
 

Type:  
User ID: admin  
Password: admin  
Station ID: 1
  - e. Click Save if you changed the User ID or Station ID. If you only entered the password the Save control will not be active.
 

It is critical that these credentials are saved because they are used at runtime.
  - f. Click Connect.

### ***Procedure 2: Configure TravelDoc tasks.***

2. Configuring Rulerunner to run tasks.
  - a. Click the Workflow:Job:Task tab to display it.
 

The names of the applications from the datacap.xml file are displayed in the left pane. The right pane does not contain threads the first time you use Rulerunner Manager.
  - b. If you don't see a list of application in the top left pane, click the full screen icon in the top right corner.



#### **Note**

This server image is used for multiple Datacap classes. You can see in the right pain that tasks have already been configured for Rulerunner to run the Navigator Job tasks for the TravelDocs application.

- 
- c. If a thread did not already exist or if you want to create a new thread then right-click in the right pane, select Threads, then select Add Thread.
 

A new thread is created in the right pane. For this exercise you use the existing thread.
  - d. In the left pane, click the TravelDocs check box.



- e. The application tree expands with the Server, Administrator, and Engine databases selected.
  - f. Click the check boxes under the Main Job, Web Job and the Navigator Job for the PageID, Profiler, and Export tasks.
  - g. Click the Main Job text and drag it to the thread0 node in the right pane. Release the mouse key while the cursor is hovering over thread0.
  - h. Verify that PageID, Profiler, and Export tasks appear under thread0 for the Main Job, Web Job and the Navigator Job.
  - i. Click Save (or CTRL+S) to save your changes.
  - j. If you see a warning that the file does not exist, click Yes acknowledge the warning and to save the configuration file.
  - k. Make sure that the thread0 check box in the right pane is selected.
3. Disconnect from the application
- a. Click the Rulerunner Login tab.
  - b. Click Disconnect.
  - c. Close the Datacap Rulerunner Manager Window.

## Enable Datacap Rulerunner logging.

1. If Rulerunner is connected then do Procedure 1, "Stop and Connect," on page A-9 to open and connect to Datacap Rulerunner Manager.
2. Configure Logging.
  - a. Click the Settings tabs and click *Write to Debug. Log Queuing activity in debug table.*
  - b. Click Save or CTRL+S to save your changes.
  - c. Click the Logging tab.
  - d. Click the Quick Log tab.
  - e. Slide the Number of Messages slider to No.
  - f. The Quick Log setting sets the ATM Rulerunner, and RRS log logging options.
3. Disconnect from the application
  - a. Click the Rulerunner Login tab.
  - b. Click Disconnect.
  - c. Close the Datacap Rulerunner Manager Window.

## **Start the Datacap Rulerunner Manager Service.**

### ***Procedure 1: Start the Rulerunner service.***

1. Double-click the Datacap Rulerunner Manager icon on the Desktop.
2. Click the Rulerunner tab.
3. Click Start.
4. Close the Datacap Rulerunner Manager window.



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