

Course Exercises Guide

# IBM Datacap 9.0.1: Datacap Navigator Configuration

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# Unit 1. Datacap Navigator Configuration

## Estimated time

08:00

## Unit overview

This unit contains these lessons.

### Lessons

[Lesson 1.1, "Navigator Updates,"](#) on page 1-7

[Lesson 1.2, "Change Datacap Navigator User Settings,"](#) on page 1-10

[Lesson 1.3, "Configure Users and Groups,"](#) on page 1-19

[Lesson 1.4, "Enable Rescan for the Verify task,"](#) on page 1-23

[Lesson 1.5, "Create Custom Panels,"](#) on page 1-29

[Lesson 1.6, "Implement External Data Services,"](#) on page 1-40

[Lesson 1.7, "Transactional Capture,"](#) on page 1-56

[Lesson 1.8, "Install and Customize Datacap Navigator,"](#) on page 1-71

### Requirements

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



**Windows**

All exercises in this unit are done exclusively on the server image ECMEDU01.

---

### Do this first

1. In your server system, if you are prompted to log in to the system, use:

Type	User ID	Password
Operating system	Administrator	passw0rd



## Important

Switch to the LLLDAP Authentication Method and configure TravelDocs to use an LLLDAP enabled Database.

The Tivoli Directory Services database is already configured for LLLDAP group authentication. Because TravelDocs is configured as the default Datacap Navigator repository, it must be configured with Datacap groups defined in the Tivoli Directory Services Database.

- If you are continuing this unit as part of the Administration course (F262), then in the Unit 1, you configured the TravelDocs application for LLDAP authentication already. You can skip step 2 to 4 and go to step 5.
- If you are taking this unit as a standalone class (F257), then you must do Steps 2 - 4 to configure the TravelDocs application to Authenticate using LLDAP.

2. In your server image, copy the LLLDAP enabled Database Admin database for TravelDocs.

- a. In Windows Explorer, go to C:\DC9-Lab Exercises\TravelDocsDB.
- b. Right-click the TravelDocsAdm-LLLDAP.mdb file and select Copy.
- c. Go to C:\Datacap\TravelDocs.
- d. Right-click anywhere in the folder and select Paste.

3. In your server image, Connect to LLLDAP enabled Adm database file.

Configure the TravelDocs Admin Database connection string to point to an admin database that has the groups included.

- a. Click Start > All Programs > IBM Datacap Services > Datacap Application Manager.
- b. Scroll and select the TravelDocs application in the left pane.
- c. In the right pane, the database paths are on the Main tab.
- d. In the Main tab > for the "Administration" field, click the Ellipsis at the right of the field.
- e. In the "Database connection parameters" dialog box > "Database type or provider name" field, select Microsoft Access (Jet) from the list.
- f. Click the Database Ellipsis and browse and select the database:  
C:\Datacap\TravelDocs\TravelDocsAdm-LLLDAP.mdb
- g. Click Open.
- h. Click OK.
- i. Click "Save changes" and then close the Datacap Application Manager.

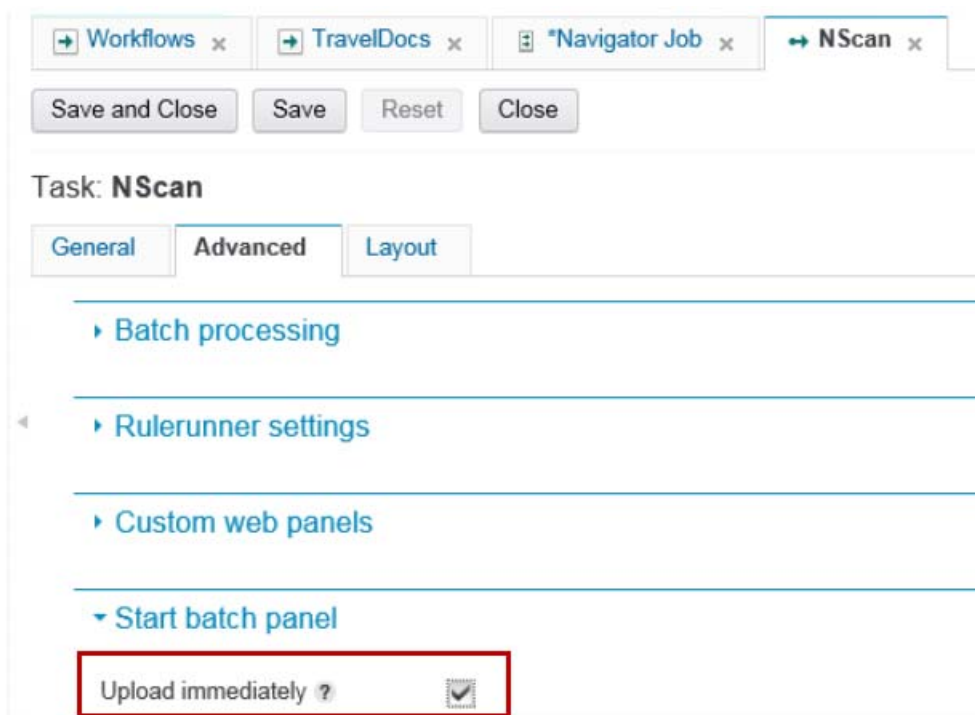
4. In your server image, select the LLLDAP Authentication Method.

- a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager. or use the shortcut on the desktop.
- b. In the "Service" tab, click Stop (Red rectangle).

- c. Click the Datacap tab.
  - d. If the “Advanced settings” are not showing, then click “Show advanced”.
  - e. For the “Authentication System” field, select the LLLDAP option from the list.
  - f. In Windows Explorer, open the C:\DC-Lab Exercises\Authentication\DCServiceTemplates.txt file.
  - g. Copy LLLDAP Authentication path template string from the file.
  - h. Paste it in the Authentication path template field.
  - i. Click Save.
  - j. Click Close to close the Datacap Server Manager window.
5. In your server image, verify and if needed, start Datacap Taskmaster Server services.
- a. Double-click the Datacap Server Manager shortcut on the desktop.
  - b. In the Datacap Server Manager > Service tab, click Start (Right green arrow) to start the Datacap Server.
  - c. Click Close to close the Datacap Server Manager window.
6. In your server image, verify and if needed, start WebSphere Application Server.
- a. Open the “WebSphere Admin” folder on the Desktop.
  - b. Double-click the Start Server1.bat script file.
- It starts the IBM FileNet Content Manager, and the IBM Content Navigator.
7. In your server image, verify and if needed, start the Rulerunner services.
- a. Double-click the “Datacap Rulerunner Manager” shortcut on the desktop.
  - b. In the “Datacap Rulerunner Manager” window, select the “Rulerunner” tab.
  - c. If the Status shows that the service is running, click “Stop” to stop the server.
- Note: The Stop operation is disabled if it is already stopped.
- d. In the “Rulerunner Login” tab, click “Disconnect” if it is already connected.
  - e. Select the “Taskmaster Authentication” option.
  - f. Verify or enter the following values:
    - User ID: datacap
    - Password: class
    - Station ID: 1
  - g. Click Save and then click Connect.
  - h. In the “Rulerunner” tab, click “Start” to start the server.
  - i. Click Close to close the window.

## In your server image, verify and if needed, set “upload immediately”

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: `susan`  
 Password: `class`
  - c. Click Login. The Datacap Navigator Administration view opens.
2. In the Administration view, select “Workflows” from the left pane.
  - a. In the “Workflows” tab, click “TravelDocs” and click Edit.
  - b. In the “TravelDocs” tab, click “Navigator Job” and click Edit.
  - c. In the “Navigator Job” tab, click “NScan” and click Edit.
  - d. In the “NScan” tab, select “Advanced” tab.
  - e. For the “Start batch panel” section, verify and select the “Upload immediately” option.
  - f. Click Save and Close.
  - g. In the “Navigator Job” tab, click Save and Close.
  - h. In the “TravelDocs” tab, click Save and Close.



3. Logout of Datacap Navigator and close the browser.



## System check

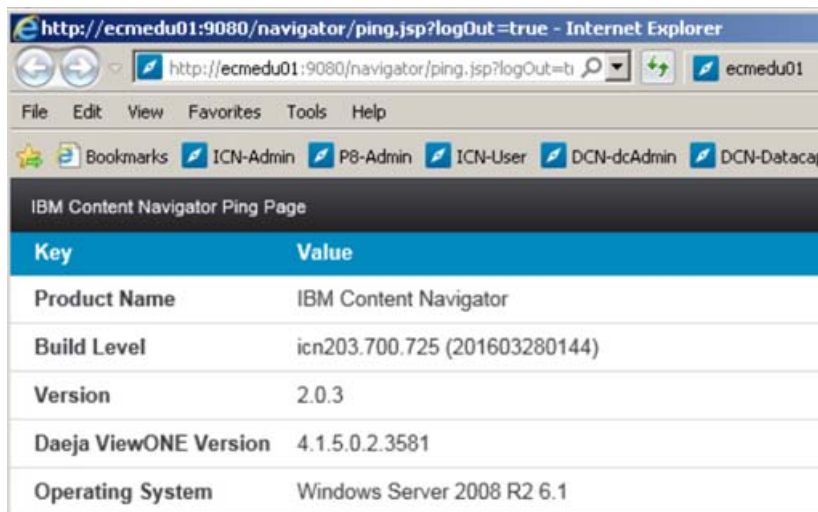
The activities in this unit assume that all system services are running when you begin an activity. Perform a system check whenever you start an IBM FileNet Content Manager system or start working on a system that is in an unknown state.

1. In the student server image > Internet Explorer browser, go to IBM Content Navigator Ping page and check that the IBM Content Navigator is working:

URL: <http://ecmedu01:9080/navigator/Ping>

You can also use the “ICN Ping Page” shortcut in the Internet Explorer browser.

- a. Log in using p8admin/IBMFielNetP8.
- b. Verify that the Navigator Ping page is displayed as shown in the following screen capture.  
This page displays the version information for Content Navigator and Operating system.



Key	Value
Product Name	IBM Content Navigator
Build Level	icn203.700.725 (201603280144)
Version	2.0.3
Daeja ViewONE Version	4.1.5.0.2.3581
Operating System	Windows Server 2008 R2 6.1

2. In the student server image, log in to Datacap Navigator administration desktop as susan/class to verify that the Datacap Server is active and connected.
  - a. Click the “DCN-dcAdmin” shortcut or enter the following URL:  
<http://ecmedu01:9080/navigator/?desktop=dcadmin>
  - b. Enter the following values:  
User ID: susan  
Password: class
  - c. Click Login. The Datacap Navigator administration view opens.
  - d. If you logged in successfully, then log out and close the browser window.
3. In the student server image, check Tivoli Directory Services.
  - a. Select Start > Administrative Tools > Services.

- b. Check that the Tivoli services are Started:  
DB2 - TDSV63DB2 - DB2TDS63-0  
DB2 - TDSV63DB2 - DSRDBM01  
  
also  
  
IBM Tivoli Directory Admin Server V6.3 - dsrdbm01  
IBM Tivoli Directory Server Instance V6.3 - dsrdbm01
  - 4. In the student server image, check the Tivoli Server is started.
    - a. Select Start > All Programs > IBM Tivoli Directory Server 6.3 > Web administration Tool.
    - b. Login as cn=root/IBMFileNetP8
    - c. Click Server administration.
    - d. Click Start/stop/restart server.
    - e. Click Start if the server is not started.
    - f. In the left pane, scroll down and click Logout.
    - g. Close the "Tivoli Directory Server Web administration Tool" window.
  - 5. See Appendix A for procedures to Start, Check, and Restart components on the student system.
- 

## End of exercise

# Lesson 1.1. Navigator Updates

## Overview

### Why is this lesson important to you?

As a Datacap Administrator you migrate applications built on earlier versions of the Datacap product to be compatible with Datacap.

To do this you must be familiar the required application configuration changes.

## Activities

[Exercise 1: Datacap Navigator Single Sign On \(SSO\)](#), on page 1-8

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
P8 Administrator	p8admin	IBMFileNetP8
Datacap user	susan	class



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Datacap Navigator Single Sign On (SSO)

### Introduction

In this activity, you configure an application to allow single sign on for components that honor the Single Sign On capability.

---



#### Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.

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### Procedure

[Procedure 1, "Enable SSO for your application,"](#) on page 1-8

[Procedure 2, "Verify SSO configuration,"](#) on page 1-9

---



#### Important

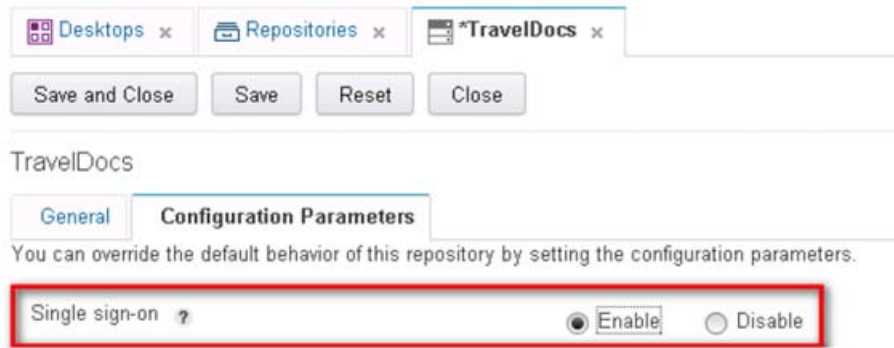
Ensure that you complete the [Do this first](#), on page 1-1 and the [System check](#), on page 1-5 procedure at the beginning of this unit, before stating this lesson.

---

### ***Procedure 1: Enable SSO for your application***

1. Access the IBM Content Navigator administration tool.
  - a. In the Internet Explorer browser, click the ICN-Admin bookmark.  
URL: `http://ecmedu01:9080/navigator/?desktop=admin`  
User name: p8admin  
Password: IBMFileNetP8
  - b. Click Repositories in the left pane.
  - c. In the Repositories tab on the right pane, select the TravelDocs repository and click Edit.
  - d. Select any editable field to allow the "Connect" option to become enabled.
  - e. Scroll down, click Connect and log in to the application.  
User Name: susan  
Password: class
  - f. Click Login. Select the Configuration Parameters tab.

- g. Click Enable for the Single sign-on parameter.



- h. Click "Save and Close".
- i. Logout of IBM Content Navigator administration tool.

## **Procedure 2: Verify SSO configuration**

1. Log in to Datacap Navigator Desktop.
  - a. In the Internet Explorer browser, click the DCN-Datacap bookmark:  
 URL: <http://ecmedu01:9080/navigator/?desktop=desktop>  
 User name: susan  
 Password: class
  - b. Click the "Open Browser View" (Drawer) in the left most control panel.
  - c. The Datacap DCExport repository should open directly without being prompted again to provide the p8admin username and password.
  - d. You now see the folders in the DCExport repository.
  - e. Logout and close the Internet Explorer window.

---

## **End of exercise**

# Lesson 1.2. Change Datacap Navigator User Settings

## Overview

### Why is this lesson important to you?

As a Datacap business user, you process capture workflows in the Datacap Navigator Client.

As a Datacap administrator, you configure User Settings in the Datacap Navigator Client.

To do these tasks effectively, you must be familiar with the Datacap Navigator User Settings.

## Activities

- [Exercise 1: Change the User Settings](#), on page 1-11

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	susan	class



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Change the User Settings

### Introduction

In this activity, you change the options available in User Settings for each task and check the behavior change when you process a Batch.

### Procedures

[Procedure 1, "Hide the title bar and shortcuts pane,"](#) on page 1-11

[Procedure 2, "Set options for the Scan task in User Settings,"](#) on page 1-13

[Procedure 3, "Change the layout for the Scan task,"](#) on page 1-14

[Procedure 4, "Configure to submit the batch automatically,"](#) on page 1-16

[Procedure 5, "Show only fields with errors for the Verify task,"](#) on page 1-16

[Procedure 6, "Configure the Job Monitor view,"](#) on page 1-18

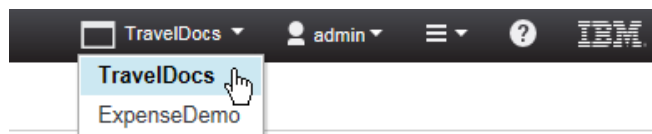


#### Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.

### ***Procedure 1: Hide the title bar and shortcuts pane***

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: `susan`  
 Password: `class`
  - c. Click Login. The Datacap view opens.
2. In the Datacap Navigator view, verify that the "TravelDocs" application is selected in the banner.
  - a. If not already selected, select "TravelDocs" from the Applications list.



3. Scan a batch to check the default settings for the title bar and the Shortcuts pane.
  - a. Click "Navigator Scan" (Blue down arrow icon) from the Shortcut list on the left.

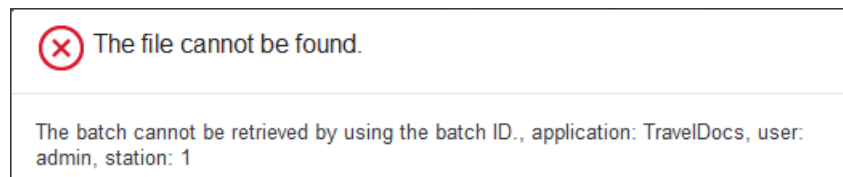


## Troubleshooting

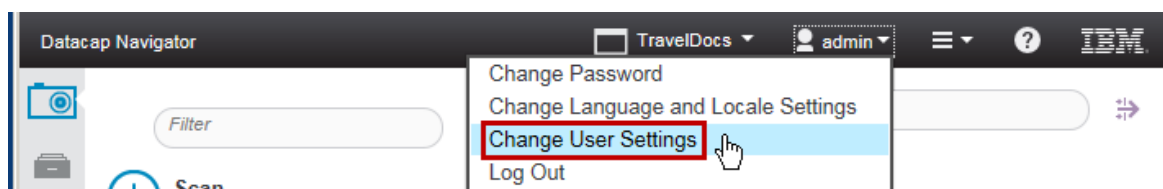
If you are prompted with “Java Update Needed”, select the “Do not ask again...” option and click “Later”.

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

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



- b. Notice that the Shortcuts pane is visible when you start the Scan task.
  - c. Notice the title bars for each widget in blue text: “Scanned Pages (0/0)” and “Batch Structure”.
- You are going to change the User Settings to hide the title bars and the Shortcuts pane.
- d. Click “Cancel” in the toolbar to close the “NScan” tab.
4. Edit the User Settings in Global tab.
- a. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.



- b. Verify that the “Global” tab is selected.
  - c. Select the “Hide the title bar in all widgets” and “Hide the Shortcuts pane when you start a task” options.
  - d. Click “Save”.
5. Scan a batch to verify the changes to the user settings for the title bar and the Shortcuts pane.
- a. In the Job Monitor, click “Navigator Scan” from the Shortcut list.





## Troubleshooting

If you get an error with a message “this batch can not be created”, close the window, and redo the step.

- b. Verify that the Shortcuts pane is hidden when you start the Scan task.
- c. Verify that the title bars for each widget in blue text (Examples: “Scanned Pages (0/0)” and “Batch Structure”) are not visible.



## Note

The changes that you made in the “Global” tab of User Settings affect the entire Datacap Navigator client. The Shortcuts pane and the title bars for each widget are hidden for all the tasks in the Datacap Navigator.

- d. Click “Cancel” in the toolbar to close the “NScan” tab.
6. Revert the changes to the User Settings in Global tab.
  - a. To see the widget title bar names again, revert the changes.
  - b. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.
  - c. Clear the “Hide the title bar in all widgets” and “Hide the Shortcuts pane when you start a task” options.
  - d. Click Save.
  - e. If needed, refresh the browser to see the Shortcuts pane.
  - f. Leave the Datacap Navigator open the next procedure.

## ***Procedure 2: Set options for the Scan task in User Settings***

1. Scan a batch to check the default settings.
  - a. In the Job Monitor, refresh the browser to see the Shortcut list, if it is not visible.
  - b. Click “Navigator Scan” from the Shortcut list.
  - c. Click “Browse” next to the “Source” field.
  - d. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
  - e. Select the `Flight1.tif` image.
  - f. Click Open and then click Scan.
2. Verify that image ID is listed in the “Batch Structure” on the right pane, and the image is shown in the viewer on the left.
  - a. Click Submit.

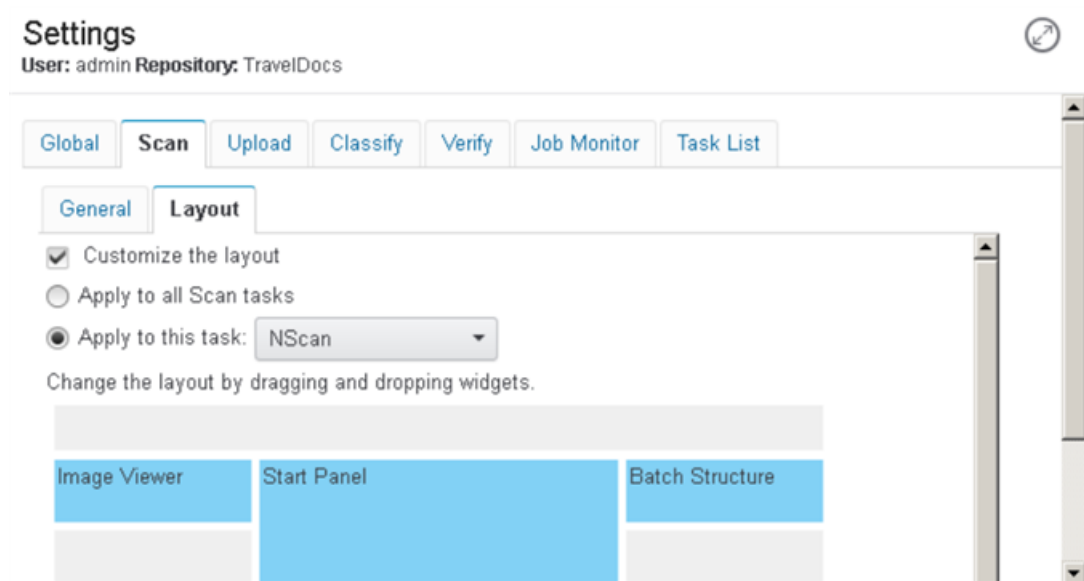
3. Notice that when the current batch is completed, the “Scan” tab is closed, and the Job Monitor page is shown.

You are going to change the User Settings to start the next batch automatically.

4. Edit the User Settings in “Scan” tab.
  - a. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.
  - b. Select the “Scan” tab.
  - c. Select the “Automatically start the next pending batch after the current batch is submitted” option.
  - d. Click “Save”.
5. Scan a batch to verify the changes.
  - a. In the Job Monitor, click “Navigator Scan” from the Shortcut list.
  - b. Click “Browse” next to the “Source” field.
  - c. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
  - d. Select the `Carl.tif` image and click Open.
  - e. Click Scan.
  - f. Click Submit.
6. Notice that when the current batch is completed, the “Scan” tab is opened again to start the next batch.
  - a. Click Cancel to close the “NScan” tab.
7. Reset the changes to the User Settings in Scan tab.
  - a. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.
  - b. Select the “Scan” tab.
  - c. Clear the “Automatically start the next batch after the current batch is submitted” option.
  - d. Leave the “User Settings” window open for the next procedure.

### ***Procedure 3: Change the layout for the Scan task***

1. In the “User Settings” window, the “Scan” tab is already opened.
  - a. Select the “Layout” subtab.
  - b. Select the “Customize the layout” option.
  - c. Observe that the layout can be applied to all Scan tasks in your system or to a specific one.
  - d. Verify and if needed select the “Apply to this task” option.



- e. Drag the widgets (blue boxes) to rearrange their position.



### Important

You can move a widget to an “empty” box (gray colored) only and not the one that has a widget already (blue colored).

- f. As an example, in the screen capture, “Batch Structure” is moved to the far left and “Image Viewer” is moved to the far right.
- g. Click “Save”.
2. Scan a batch to verify the changes.
  - a. In the Job Monitor, click “Navigator Scan” from the Shortcut list.
  - b. Click “Browse” next to the “Source” field.
  - c. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
  - d. Select the `Flight1.tif` image and click Open.
  - e. Click Scan.
3. Verify that the new layout that you configured.
  - a. The “Batch Structure” widget (ID list) is shown on the left.
  - b. The “Image Viewer” widget (scanned image) is shown on the right.
  - c. Click Submit to complete the scan.
  - d. Leave the Datacap Navigator open for next procedure.



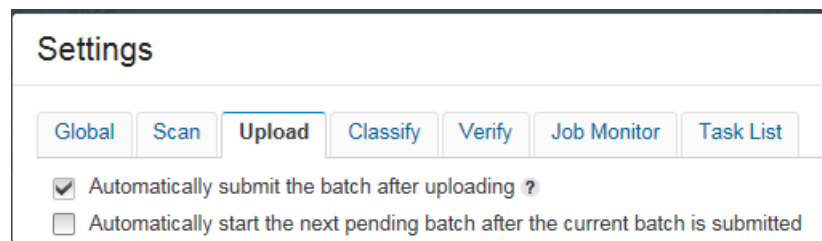
### Information

The layout for the “Classify” and “Verify” pages can be customized in the User settings. The steps are similar to the [Procedure 3, “Change the layout for the Scan task,”](#) on page 1-14.

## **Procedure 4: Configure to submit the batch automatically**

This setting is already done on your student image for the other labs to be able to process the batches. In this procedure, you verify this configuration in the User Settings.

1. In the Datacap Navigator, open the User Settings.
  - a. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.
  - b. The “Settings” window opens.
2. Edit the User Settings in Upload tab.
  - a. Select the “Upload” tab.
  - b. Verify that the “Automatically submit the batch after uploading” option is selected. If not, select the option.



- c. Click “Save”. This configuration enables the system to submit the batch automatically after the upload.
  - d. Leave Datacap Navigator opened for the next procedure.

## **Procedure 5: Show only fields with errors for the Verify task**

1. Check the default settings for the Verify task.
  - a. In the Job Monitor, refresh the browser.
  - b. Select a batch that is in the “pending” state at the Verify task from the list. (Do not use the batches in the Hold state.)
  - c. Skip to Step 8 in this procedure.
  - d. If there is no pending batch at the Verify task available in the list, create a batch with the steps in the “Hint” section.

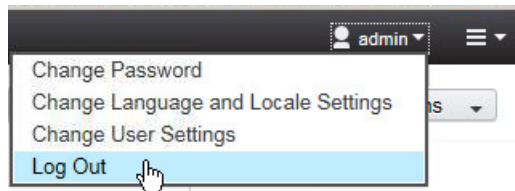
**Hint**

Create a batch and process it up to the Verify task. Do Steps 2-7.

2. Scan a batch.
    - a. Click “Scan” from the Shortcut list.
    - b. Click “Browse” next to the “Source” field.
    - c. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
    - d. Select the `Flight1.tif` image and click Open.
    - e. Click Scan.
  3. Verify that image ID is listed in the “Batch Structure” and the image is shown in the viewer and click Submit.
  4. The NUpload task runs automatically.
    - a. It processes the batch and uploads the file.
  5. The “PageID” and “Profiler” tasks are configured to run automatically.
  6. It takes a few seconds. Refresh the list in the Job Monitor view.
  7. Verify that your batch is now in the pending state for the “Verify” task. The Batch has today’s date.
- 
8. Double-click your batch to open the Verify task.
  9. In the “Verify” tab, check the fields that are listed in the “Field Details” pane (middle column).
    - a. All the fields that are in the document are shown.  
After you configure in User Settings, only the fields that have errors are shown.
  10. Open the “User Settings” window and select the “Verify” tab.
    - a. In the “General” subtab, select the “Show only fields that have errors” option.
    - b. Click “Save”.
  11. Check the new configuration for the Verify task.
    - a. If the task is not opened, select the same batch with Verify task that you checked before configuring the “Verify” tab in “User Settings”.
    - b. Check the fields that are listed in the “Field Details” pane (middle column).
    - c. Verify that only the fields that have errors are shown.
  12. Reset the change to the User Settings.
    - a. Open the “User Settings” window and select the “Verify” tab.
    - b. In the “General” subtab, clear the “Show only fields that have errors” option.
    - c. Click “Save” and close the “User Settings” window.
  13. Complete the Verify step or close the Verify tab.

## Procedure 6: Configure the Job Monitor view

1. Check the default settings in Job Monitor.
  - a. In the Job Monitor, check the order of “Batch”, “Job”, “Task”, “Status”, and “Job Start” columns.
  - b. Scroll to the right and check the “Job Time” and “Pages” columns.  
 You are going to change the order of the columns and remove some columns in the User Settings to change the display in Job Monitor.
2. Open the “User Settings” window and select the “Job Monitor” tab.
  - a. Move the “Pages” columns from the “Selected Columns” to “Available Columns”. Use the backward arrow.  
 This step removes the specified columns in Job Monitor.
  - b. In the “Selected Columns”, move the “Job” down after “Task”. Use the down arrow.
  - c. Move the “Job Time” up to after “Job Start”. Use the down arrow.
  - d. Click “Save”.
3. Check the new configuration in Job Monitor.
  - a. Verify that the order of “Queue ID”, “Batch”, “Job”, “Task”, “Status”, and “Job Start” columns is changed to “Queue ID”, “Batch”, “Task”, “Job”, “Status”, “Job Start”, and “Job Time”.
  - b. Scroll to the right and verify that the “Pages” columns is removed from the display.
4. Log out of Datacap Navigator and close the window.



## End of exercise

# Lesson 1.3. Configure Users and Groups

## Overview

### Why is this lesson important to you?

As an administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0 system.

You must configure security users and groups for Datacap system.

## Activities

[Exercise 1: Create Users and Groups](#), on page 1-20

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap Desktop	susan	class



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Create Users and Groups

### Introduction

In the administration View, you configure Workflows, Groups, Users, Stations, Shortcuts, and Panels.

As an administrator, you can create users and groups, and set permissions and privileges.

### Procedures

[Procedure 1, "Open the Administrator view,"](#) on page 1-20

[Procedure 2, "Create a user and a group,"](#) on page 1-20

---



#### Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.

---



#### Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first](#), on page 1-1 section at the beginning of this unit.

---

### ***Procedure 1: Open the Administrator view***

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: `susan`  
 Password: `class`
  - c. Click Login. The Datacap Navigator Administration view opens.

### ***Procedure 2: Create a user and a group***

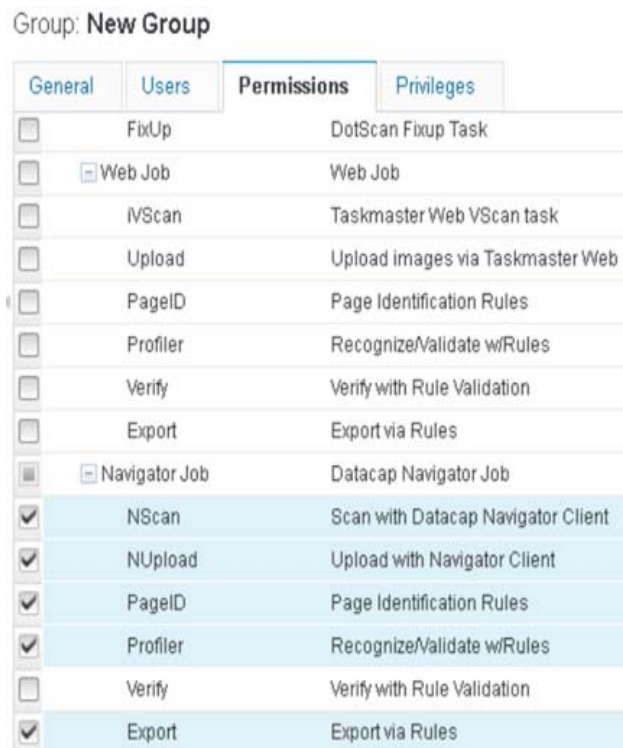
1. In the Administration view, select "Users" from the left pane.
  - a. In the "Users" tab, click "New User".
  - b. In the "New User" tab, enter a name for the user (Example: `test1`).
  - c. Enter a password for the "Password" and the "Retype Password" fields (Example: `test1`).
  - d. Click "Save and Close".
  - e. Verify that the user that you created is listed in the "Users" tab.



**Note**

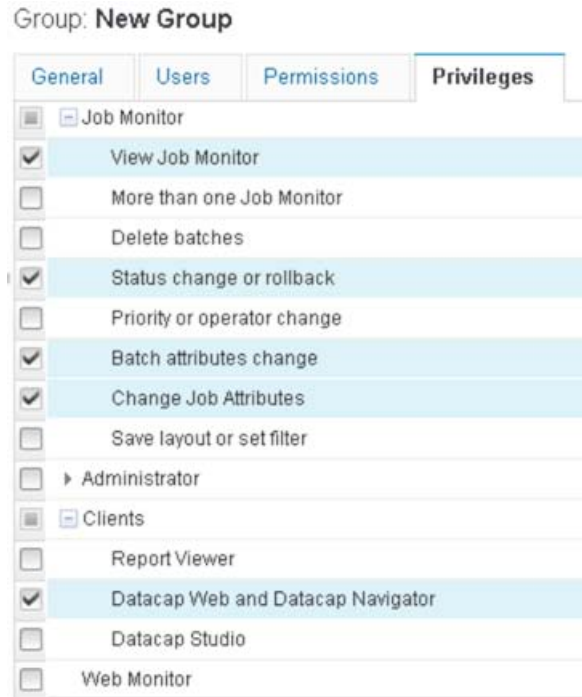
You are going to add this user to a group and set Permissions and Privileges in the Group.

2. Select “Groups” from the left pane.
  - a. In the “Groups” tab, click “New Group”.
  - b. In the “New Group” tab, enter a name for the Group (Example: Testers).
3. Add the user that you created to the group.
  - a. Select the “Users” subtab.
  - b. Move the “test1” user from the “Available Users” pane to the “Selected Users” pane. Use the forward arrow.
4. Set permissions to the group.
  - a. Select the “Permissions” subtab.
  - b. Select the “NScan”, “NUpload”, “PageID”, “Profiler”, and “Export” tasks for the “Navigator Job” as shown in the following screen capture.



5. Set privileges to the group.
  - a. Select the “Privileges” subtab.

- b. Select the following components under the “Job Monitor”:
  - “View Job Monitor”
  - “Status change or rollback”
  - “Batch attributes change”,
  - “Change Job attributes”
- c. Select the “Datacap Web and Datacap Navigator” component under the “Clients”:
- d. The completed page looks like the following screen capture.



- e. Click “Save and Close”.
  - f. Verify that the group that you created is listed in the “Groups” tab.
6. Log out the Datacap Navigator and close the browser.



### Information

Users who are created in the application can be used only in the TMA authentication mode. Since you are using LLDP method for all the labs in this unit, we cannot test them in this mode.

## End of exercise

# Lesson 1.4. Enable Rescan for the Verify task

## Overview

### Why is this lesson important to you?

As an administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0 system.

You enable Rescan for the Verify and Nfixup tasks.

## Activities

[Exercise 1: Enable Rescan for the Verify task](#), on page 1-24

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap Desktop	susan	class



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Enable Rescan for the Verify task

### Introduction

You can rescan documents in the Verify task. By default, the Rescan option is not visible on the task page.

As an administrator, you configure the rescan in the Administration View.

### Procedures

[Procedure 1, "Check the default settings in Datacap Navigator,"](#) on page 1-24

[Procedure 2, "Configure rescan in Datacap Navigator,"](#) on page 1-25

[Procedure 3, "Test the rescan option,"](#) on page 1-26



#### Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.



#### Important

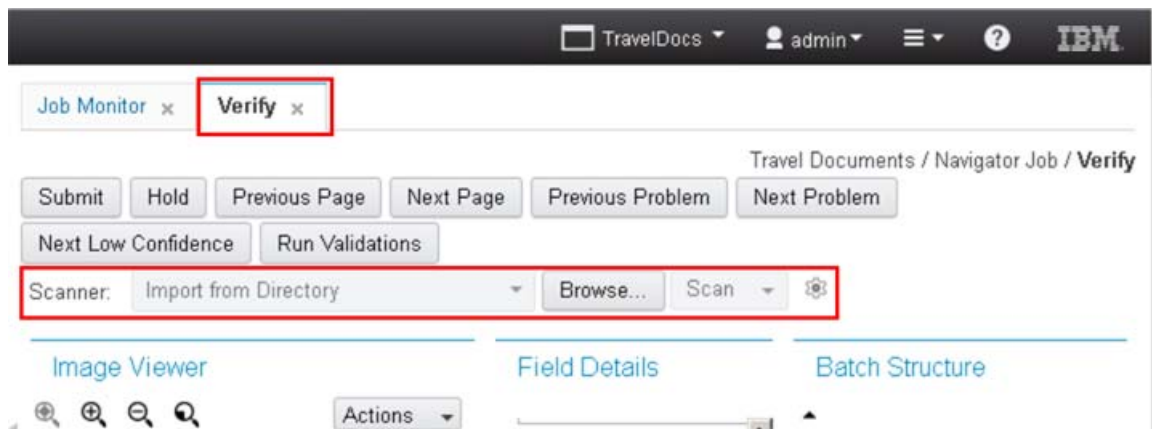
If they are not already started, start the Datacap system components. Use the instructions in the [Do this first](#), on page 1-1 section at the beginning of this unit.

### ***Procedure 1: Check the default settings in 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: susan  
 Password: class
2. Click Login. The Datacap view opens.
3. Make sure TravelDocs application is selected.
  - a. In the banner, verify or select TravelDocs from the Applications list.
4. In the Job Monitor, open a batch that is in the Verify task. Skip to Step 6. If you don't have a batch, follow Steps 4-5 to scan and process a batch.
5. Scan a batch.
  - a. In the Job Monitor, click "Navigator Scan" (Blue down arrow icon) from the Shortcut list on the left.
  - b. Click "Browse" next to the "Source" field.

- c. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
  - d. Select the `car1.tif` image.
  - e. Click Open and then click Scan.
  - f. Verify that image ID is listed in the “Batch Structure” on the right pane, and the image is shown in the viewer on the left.
  - g. Click Submit.
6. When the batch is completed, the “Scan” tab is closed, Upload, Page ID and Profiler task runs automatically. All the three steps take a few moments.
    - a. In the Job Monitor page, click Refresh to see the status of your batch. Check that it is in Verify task.
    - b. Double-click your batch to open the Verify task.
  7. In the Verify tab, check that scan option for rescanning is not available.
    - a. In the next procedure, you are going to enable this option.

The following screen capture shows the Scan widget that becomes available in the Verify task after enabling the scan.

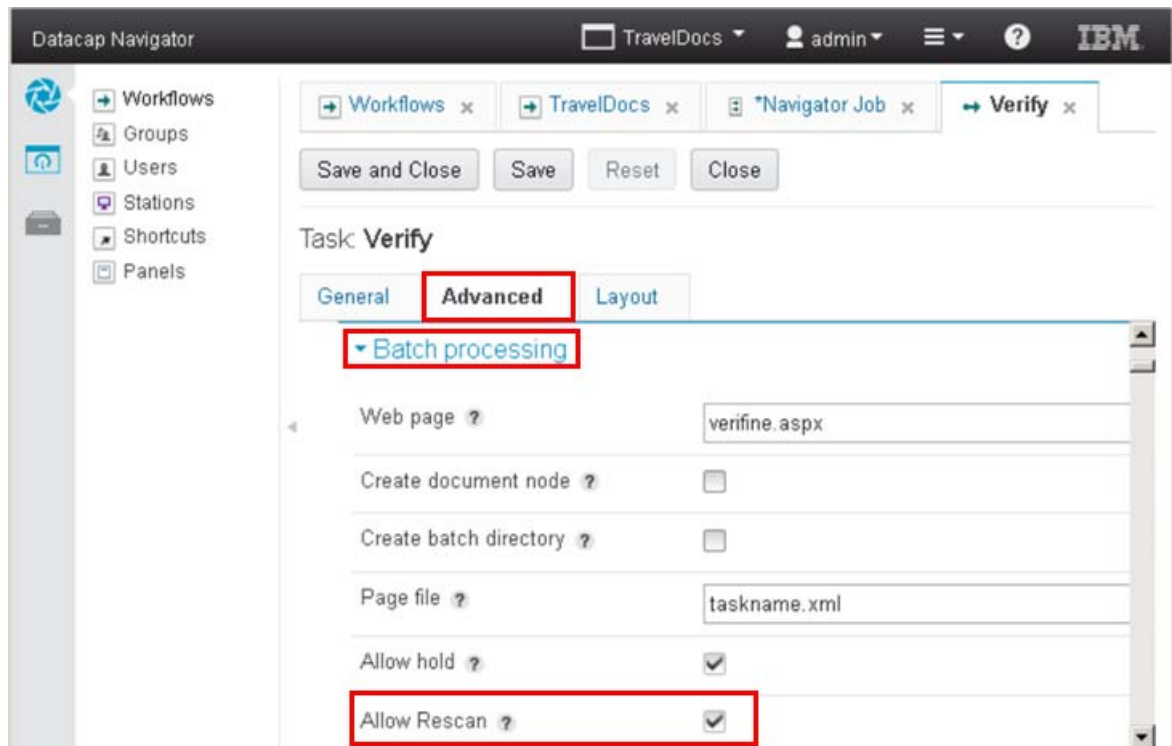


- b. Close the Verify task.
- c. Log out of Datacap Navigator.

## ***Procedure 2: Configure rescan in Datacap Navigator***

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: `susan`  
 Password: `class`
  - c. Click Login. The Datacap Navigator Administration view opens.

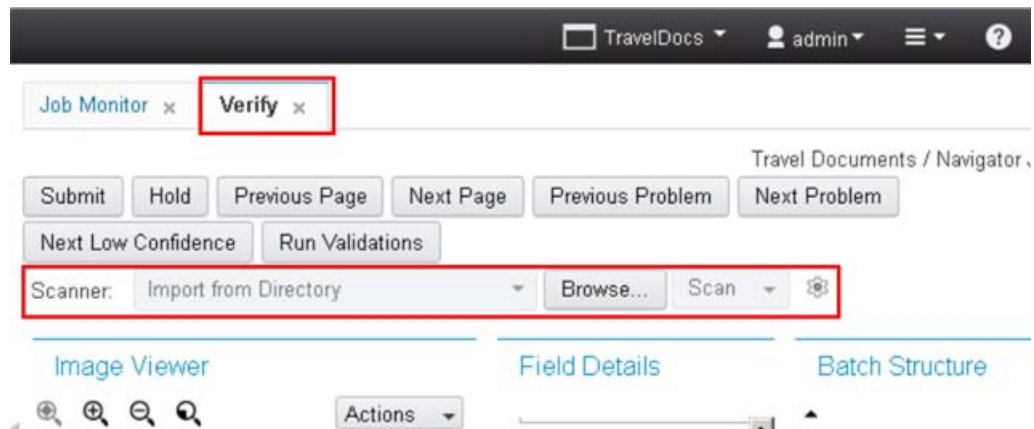
2. In the Datacap Navigator Administration view, select the “Workflows” tab.
  - a. In the Workflows tab, select “TravelDocs” and click Edit.
  - b. In the “TravelDocs” tab, select “Jobs” subtab.
  - c. In the “Jobs” subtab, select “Navigator Job” and click Edit.
  - d. In the “Navigator Job” tab, select the “Tasks” subtab.
3. In the “Tasks” subtab, select “Verify” and click Edit.
  - a. In the “Verify” tab, select “Advanced” subtab.
  - b. In the “Batch processing” section, select the “Allow Rescan” option.



4. Click “Save and Close” on the following tabs to save the changes.
  - Verify
  - Navigator Job
  - TravelDocs
5. Log out the Datacap Navigator and close the browser.

### ***Procedure 3: Test the rescan option***

1. Repeat [Procedure 1, "Check the default settings in Datacap Navigator,"](#) on page 1-24 to open a batch that is in the Verify task.
2. In the Verify tab, check that the rescan option is available.



3. Check the Batch structure.

- a. It has one page (pageType: Car rental agreement).

Batch Structure			
ID	Type	Status	
20160520.000010	Travel Documents	OK	
20160520.000010.01	Car rental	OK	
TM000001	Car rental agreement	Problem	

4. Rescan a document.

- a. Click "Browse" next to the "Scanner" field.
  - a. In the "Choose File to Upload" window, go to C:\Datacap\TravelDocs\images
  - b. Select the car1.tif image and click Open.
  - c. Click "Scan" and select "Insert". You can also select the "Replace" or "Append" options.
  - d. Verify that image ID is listed in the "Batch Structure" on the right pane, and the image is shown in the viewer on the left. Now the Batch structure contains 2 pages.
  - e. Click Submit.
  - f. If needed, select Submit again for the second image.
5. In Job Monitor, if you are batch is at Upload task, click the "Upload" shortcut to complete the upload.
  6. Optional: Verify that the batch advances to the Export task and to the Job Done status.
  7. Log out of the Datacap Navigator.

### ***Procedure 4: Verify the rescan setup in the tmweb client***

The Rescan configuration that you did in Datacap Navigator admin client can be checked in the tmweb client.

1. In the Internet Explorer browser, open the tmweb client.
  - a. Enter the following URL: `http://ecmedu01:9080/tmweb.net/`
  - b. Enter or select the following values:
 

Application: TravelDocs  
 User ID: susan  
 Password: class  
 Station: 1
  - c. Click Login. The tmweb view opens.
2. Open the settings for Verify task.
  - a. Click the “Administrator” tab.
  - b. Expand the “Navigator Job” and click the “Verify” task.
  - c. Click “Setup” in the right pane.
  - d. In the “Verify.set.xml” window, check that the “Allow Rescan” option is selected in the “Batch Processing” section.

Batch processing	
Web page	<input type="text" value="verifine.aspx"/>
Create document node	<input type="checkbox"/>
Create batch directory	<input type="checkbox"/>
Page file	<input type="text" value="taskname.xml"/>
Allow hold	<input checked="" type="checkbox"/>
Allow Rescan	<input checked="" type="checkbox"/>

- e. Close the Setup window, log out of the tmweb client, and close the browser.

### **End of exercise**



# Lesson 1.5. Create Custom Panels

## Overview

### Why is this lesson important to you?

As an administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0 system.

You must create custom panels and associate them with a task.

## Activities

[Exercise 1: Create a custom Panel for a task](#), on page 1-30

[Exercise 2: Modify the custom panel in the panel data file \(optional\)](#), on page 1-37

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap Desktop	susan	class



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Create a custom Panel for a task

### Introduction

A panel is a user interface for data entry. Example: the Start Batch panel on the Scan task, and the Field Details panel in the Verify task.

The system generates the panels dynamically and it does not require any extra setup. If you want to create your own layout, you can create Custom Panels. You can rearrange the fields and change the appearance and behavior of the panel in various ways.

In this activity, you create a new panel for “Verify”, and assign the panel to the Verify task.

### Procedures

[Procedure 1, "Create a batch with a rental car agreement,"](#) on page 1-30

[Procedure 2, "Check the default Panel for Verify task,"](#) on page 1-31

[Procedure 3, "Create a Custom Panel,"](#) on page 1-32

[Procedure 4, "Assign the custom panel to a task,"](#) on page 1-35

[Procedure 5, "Test the Custom Panel,"](#) on page 1-35



#### Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.



#### Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first](#), on page 1-1 section at the beginning of this unit.

### ***Procedure 1: Create a batch with a rental car agreement***

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: `susan`  
 Password: `class`
  - c. Click Login.
2. In the Datacap Navigator view, verify that the “TravelDocs” application is selected in the banner.
  - a. If not selected, select “TravelDocs” from the Applications list.

3. Scan a batch.
  - a. Click “Navigator Scan” from the Shortcut list.
  - b. Click “Browse” next to the “Source” field.
  - c. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
  - d. Select the `car1.tif` image and click Open.
  - e. Click Scan.
4. Verify that image ID is listed in the “Batch Structure” and the images is shown in the viewer.
  - a. Click Submit.
5. In Job Monitor, if you are batch is at Upload task, click the “Upload” shortcut to complete the upload.
6. The “PageID” and “batch Profiler” tasks are configured to run automatically.
7. In the Job Monitor, from the list, select the batch that you created. The Batch has today’s date and Task name is Batch Profiler.
8. Refresh the list in the Job Monitor view.
9. Verify that your batch is now in the pending state for the “Verify” task. The Batch has today’s date.
  - a. Double-click it to open in the Verify tab.
  - b. Leave the browser open for the next procedure.

### ***Procedure 2: Check the default Panel for Verify task***

1. The Verify tab is opened from the previous procedure.
  - a. Check the default panel for the Verify task.
  - b. Notice that in the Field Details panel (in the middle), some of the system generated fields that are not used for this application. They are shown in red box in the following screen capture.  
  
 Example: “Stick Text Field”, “Text\_Field”  
 When you configure a custom panel, you are going to remove these fields.
2. You are also going to rearrange the fields such as “Pickup\_Date”. They are shown in green box in the following screen capture.

Job Monitor x Verify x

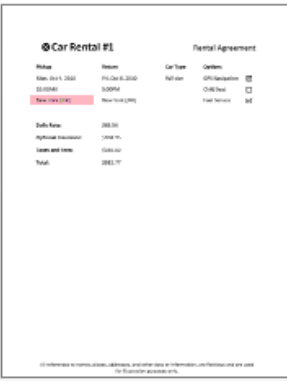
Submit Hold Previous Page Next Page Previous Problem

Next Problem Next Low Confidence Run Validations

TravelDocs / Navigator Job / Verify

**Image Viewer**

⏮ ⏪ ⏩ ⏭ ⏮ ⏪ ⏩ ⏭ ⏮ ⏪ ⏩ ⏭ ⏮ ⏪ ⏩ ⏭



**Field Details**

Stick Text Field

Text\_Field

Pickup\_Date

Mon, Oct 4, 2010

Mon, Oct 4, 2010

Pickup\_Location

New York (JFK)

New York (JFK)

**Batch Structure**

ID	Type	Status
20150422.000000	TravelDoc	OK
20150422.000000.0	Car_Rent	OK
TM000001	Rental_Ag	Problem

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

### Procedure 3: Create a Custom Panel

- In the Internet Explorer browser, open the Datacap Navigator for administrators. For details, see [Procedure 1, "Open the Administrator view,"](#) on page 1-20
- In the Datacap Navigator administration view, verify that the "TravelDocs" application is selected in the banner.
  - If not selected, select "TravelDocs" from the Applications list.
- Select "Panels" on the left pane.
  - The "Panels" tab opens in the right pane.
 

The list is empty. It is going to be populated after you complete your custom panel.
- Create a custom panel.
  - Click "New Panel" and select "Verification Panel" from the list.
  - Verify that "TravelDocs" is selected for the "Workflow" field.
  - For the "Page Type" field, select "Rental\_Agreement" from the list.
 

The Panel Designer with the "Design" tab (at the end of the page) opens.

The default panel layout is constructed in the middle pane.
  - For the "Name" field, enter "EDUVerifyCustomPanel".

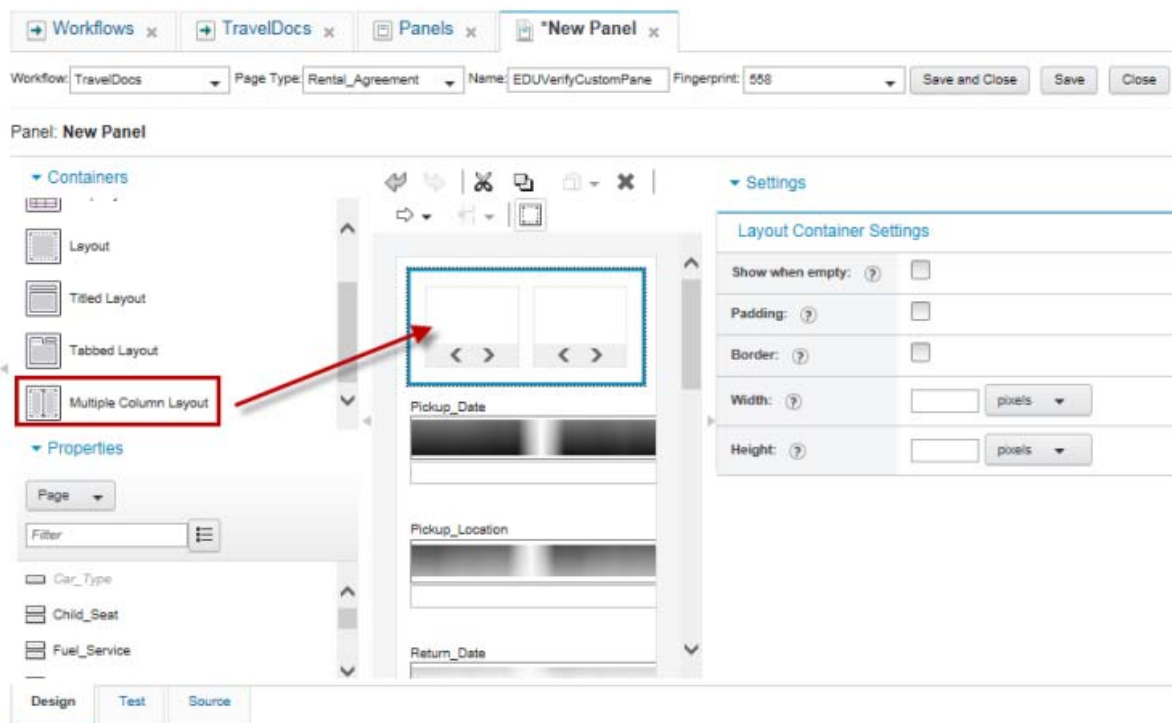
- e. For the “Fingerprint” field, select 558 from the list.
5. Maximize the browser to clearly see the fields in the middle pane in the design tab.
6. Delete the following system generated fields that are not required for this lab.
  - Sticky Field
  - Text Field
  - Options Field



### Hint

You can right-click each field, and select Delete from the list. Or you can select many fields with control and click and then select the Delete icon in the toolbar in the middle pane.

7. Scroll down and select the “Multi-Column Layout” icon from the “Containers” list on the left column of the Design tab.
  - a. Drag it to the center panel and place it above the “Pickup\_Date” field as shown in the following screen capture.



8. Drag the Pick\_Date, Pickup\_Location, Return\_Date, Return\_Location, Car\_Type, and Total\_Cost fields into the Multi-Column Layout.



### Note

By default, all fields are listed vertically. You can rearrange the panel by dragging the fields.

9. A sample of a custom Verification panel is shown in the following screen capture.
- a. Your panel might look different depending on where you dragged the fields.

10. Select a field (in the screen capture above, the “Return\_Location” is selected).
- a. Notice that you can configure a field to be “Read-only”, “required”, “Hidden”, or assign a default value in the “Property Settings” pane.



### Note

In the next lesson, you are going to configure the fields by using an External Data Service.

11. Click “Save and Close”.
- a. Verify the new panel that you created is listed in the “Panels” tab.

ID	Panel Name	Page Type	Workflow
1	EDUVerifyCustomPanel	Rental_Agreement	TravelDocs



### Information

You can also create custom panels for the Start Batch panel and the Batch Editor panel. For the Start Batch Panel, the DCO Type on the Scan task advanced properties is TravelDocs. For the Batch Editor, there is no need to configure tasks settings, the system fetches the last Batch Editor panel that is created for the application.

## Procedure 4: Assign the custom panel to a task

1. Open the “Verify” task.
  - a. In the Workflows tab, select “TravelDocs” and click Edit.
  - b. In the “TravelDocs” tab, select “Jobs” subtab.
  - c. In the “Jobs” subtab, select “Navigator Job”, and click Edit.
  - d. In the “Navigator Job” tab, select “Tasks” subtab.
  - e. In the “Tasks” subtab, select “Verify”, and click Edit.
2. Assign the custom panel to the task.
  - a. In the “Verify” tab, select the “Advanced” tab.
  - b. In the “Advanced” tab, scroll down to the “Custom web panels” section.
  - c. Select the “Use custom web panels” option.
  - d. Replace the existing text and enter `Rental_Agreement` and then `EDUVerifyCustomPanel` for the “Panel for” field.

3. Click “Save and Close” in the “Verify” tab.
  - a. Click “Save and Close” in the “Navigator Job” tab.
  - b. Click “Save and Close” in the “TravelDocs” tab.
4. Logout of Datacap Navigator and close Internet Explorer.

## Procedure 5: Test the Custom Panel

1. In the Datacap Navigator for business users, create a batch and process it. For detailed instructions, refer to the [Procedure 1, "Create a batch with a rental car agreement,"](#) on page 1-30.

2. The Verify tab is opened.
  - a. Observe that the custom panel is used in for “Field Details” for the Verify task.
  - b. Check that in the Field Details panel (in the middle), the system generated fields are not shown since you deleted them for the custom panel.

Example: “Stick Text Field”, “Text\_Field”
3. Verify that the fields such as “Return Location” and “Pickup\_Date” are rearranged as you designed.

The screenshot displays the Datacap Navigator interface in the 'Verify' tab. The top navigation bar includes 'Job Monitor' and 'Verify' tabs. Below the tabs are buttons for 'Submit', 'Hold', 'Previous Page', 'Next Page', 'Previous Problem', 'Next Problem', 'Next Low Confidence', and 'Run Validations'. The main area is divided into three panels: 'Image Viewer' on the left, 'Field Details' in the center, and 'Batch Structure' on the right. The 'Field Details' panel is highlighted with a red border and contains a table of data fields. The 'Batch Structure' panel shows a list of documents with IDs and a 'TMI' button.

Return_Location	Pickup_Date
New York (JFK)	Mon, Oct 4, 2010
New York (JFK)	Mon, Oct 4, 2010

Pickup_Location	Return_Date
New York (JFK)	Fri, Oct 8, 2010
New York (JFK)	Fri, Oct 8, 2010

Car_Type	Total_Cost
Full size	\$582.77
Full size	582.77

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

## End of exercise



## Exercise 2: Modify the custom panel in the panel data file (optional)

### Introduction

The panel designer supports the layout of fields that are designed in Datacap Studio. You can further modify the custom panel that you created in the designer to add other User Interface elements. Example: Add a logo image to your custom panel.

The system generates a file to store the data for each panel. To modify a panel, you edit this file. In this activity, you edit the file to add a logo.

### Procedures

[Procedure 1, "Edit the panel data file,"](#) on page 1-37

[Procedure 2, "Test the changes to the panel,"](#) on page 1-38

#### ***Procedure 1: Edit the panel data file***

Panel data files are stored within their corresponding Datacap application folder.

1. In Windows Explorer, go to the following folder:

C:\Datacap\TravelDocs\navigatorpanel\panels\

2. Open the "eduverifycustompanel" file in Notepad++. When you created a custom panel, the system generated this file.



#### **Note**

This file contains the html\_markup value that the panel designer generates and it is a standard Dojo widget template. You modify it to add an element into the panel. You add the URL of an image file that displays an IBM logo image on top of the panel.

3. Add the following html markup code to the file "html\_markup" : "

`<img src=\"http:\\\\ecmedu01:9080\\navigator\\DCNImages\\DCNIBMLogo.png\" />`

There should be no extraneous new line characters in the file.



#### **Hint**

The HTMLPathforImage.txt file in the C:\DC9-Lab Exercises\Custom Panel folder contains the html code. You can also copy and paste the text from this file.

---



## Information

An image file for the banner logo is already copied into the C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\P8Node01Cell\navigator.ear\navigator.war\DCNImages folder.

4. The completed file looks like the one in the following screen capture. The added code is highlighted in green:

```

1 { "fp_id": "558", "panel_ind": "7", "panel_name": "EDUVerifyCustomPanel", "page_type": "Rental_Agree
html_markup": "<img src=\"http://ecmedu01:9080/navigator/DCNImages/DCNIBMLogo.png\" /><d
data-dojo-type=\"pvr/widget/Layout\"><div
data-dojo-type=\"pvr/widget/MultiColumnContainer\"><div
data-dojo-type=\"pvr/widget/Layout\"><div data-dojo-type=\"pvr/widget/Property\"
data-dojo-props=\"binding: 'DC_Page.Return_Location', editor: 'datacapweb/widget/editors/DCI
Editor'\"></div><div data-dojo-type=\"pvr/widget/Property\"
data-dojo-props=\"binding: 'DC_Page.Pickup_Location', editor: 'datacapweb/widget/editors/DCI
Editor'\"></div><div data-dojo-type=\"pvr/widget/Property\"
data-dojo-props=\"binding: 'DC_Page.Car_Type', editor: 'datacapweb/widget/editors/DCITextBox
\"></div></div><div data-dojo-type=\"pvr/widget/Layout\"><div
data-dojo-type=\"pvr/widget/Property\"
data-dojo-props=\"binding: 'DC_Page.Pickup_Date', editor: 'datacapweb/widget/editors/DCIText
or'\"></div><div data-dojo-type=\"pvr/widget/Property\"
data-dojo-props=\"binding: 'DC_Page.Return_Date', editor: 'datacapweb/widget/editors/DCIText
or'\"></div><div data-dojo-type=\"pvr/widget/Property\"
data-dojo-props=\"binding: 'DC_Page.Total_Cost', editor: 'datacapweb/widget/editors/DCITextB
r'\"></div></div></div></div>\", \"markup_resources\": \"{}\", \"workflow_ind\": \"TravelDocs\" }

```

5. Save and close this file.

## Procedure 2: Test the changes to the panel

1. In the Datacap Navigator for business users, create a batch and process it up to Verify step. For detailed instructions, refer to the [Procedure 1, "Create a batch with a rental car agreement,"](#) on page 1-30.
  - a. Open the Verify task.
  - b. In the Verify tab, verify that a logo is added at the top of the “Field Details” panel in the middle section as shown in the following screen capture.

Job Monitor x

Verify x

Submit

Hold

Previous Page

Next Page

Previous Problem

Next Problem

Next Low Confidence

Run Validations

TravelDocs / Navigator Job / Verify

Image Viewer

Field Details

Return\_Location

New York (JFK)

New York (JFK)

Pickup\_Location

New York (JFK)

New York (JFK)

Car\_Type

Full size

Full size

Pickup\_Date

Mon, Oct 4, 2010

Mon, Oct 4, 2010

Return\_Date

Fri, Oct 8, 2010

Fri, Oct 8, 2010

Total\_Cost

\$582.77

582.77

Batch Structure

ID

20150422.0

20150422.0

TM00

2. Close the task.
  - a. Click Hold.
  - b. Log out of Datacap Navigator and close the browser.

## End of exercise

# Lesson 1.6. Implement External Data Services

## Overview

### Why is this lesson important to you?

As a Datacap system administrator, you customize the Datacap Navigator. One of the aspects in customization is implementing External Data Services (EDS).

To do these tasks effectively, you must be familiar with registering the EDS plug-in and modifying the sample EDS files.

## Activities

- [Exercise 1: Register Datacap Navigator EDS plug-in](#), on page 1-41
- [Exercise 2: Customize Datacap Navigator Job Monitor](#), on page 1-45
- [Exercise 3: Configure data validation for a field](#), on page 1-47
- [Exercise 4: Create Choice Lists with Sample EDS](#), on page 1-52

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	susan	class



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Register Datacap Navigator EDS plug-in

### Introduction

The External Data Services (EDS) web application must be deployed before configuring the plug-in. This deployed EDS must be linked to IBM Content Navigator where you register and configure the EDS plug-in (edsPlugin) in the admin tool.

The sample EDS is already deployed on WebSphere Application Server in your student system. In this lab exercise, you register the EDS plug-in in the IBM Content Navigator.

### Procedures:

[Procedure 1, "Check the default behavior in Job Monitor,"](#) on page 1-41

[Procedure 2, "Check the sample EDS deployment,"](#) on page 1-42

[Procedure 3, "Register the EDS plug-in,"](#) on page 1-42



#### Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.



#### Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first](#), on page 1-1 section at the beginning of this unit.

### ***Procedure 1: Check the default behavior in Job Monitor***

After implementing EDS, the Job Monitor page shows a customized user interface. In this procedure, you check the default behavior before the customization.

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: `susan`  
 Password: `class`
  - c. Click Login. The Datacap view opens.
2. In the Job Monitor, check the default behavior for a cell or a column.
  - a. In the following screen capture, the "Status" column shows all the values in the same style.  
 With the EDS implementation, you can customize a cell to highlight a status value.  
 (Example: "aborted").

- b. The “Job Time” column shows the values as numbers.

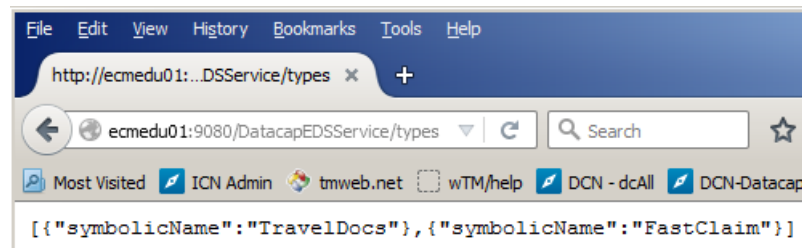
With the EDS implementation, you can customize a column to show a progress bar.

Start		Edit Job	Edit Batch	Delete	View History	Filter	
	Queue ID	Batch	Job	Task	Status	Job Start	Job Time
11	11	20151021.00000	Navigator Job	Scan	hold	10/21/2015, 1:23 AM	12
10	10	20151021.00000	Navigator Job	NVerify	running	10/21/2015, 12:46 AM	2454
9	9	20151020.00000	Navigator Job	Scan	hold	10/20/2015, 10:33 PM	693
8	8	20151020.00000	Navigator Job	Scan	aborted	10/20/2015, 9:03 PM	1236
7	7	20151020.00000	Navigator Job	Scan	running	10/20/2015, 8:58 PM	0
6	6	20151020.00000	Navigator Job	Scan	hold	10/20/2015, 8:26 PM	1379
5	5	20151020.00000	Navigator Job	Scan	running	10/20/2015, 8:10 PM	0
4	4	20141221.00000	Navigator Job	PageID	hold	12/21/2014, 4:35 PM	0
3	3	20141221.00000	Navigator Job	NVerify	hold	12/21/2014, 4:35 PM	21
2	2	20141221.00000	Navigator Job	Export	Job done	12/21/2014, 4:34 PM	1
1	1	20141221.00000	Navigator Job	NUpload	pending	12/21/2014, 4:33 PM	0

3. Log out of the Datacap Navigator.

## Procedure 2: Check the sample EDS deployment

- In a browser, go to <http://ecmedu01:9080/DatacapEDSService/types> (The URL is case-sensitive). You can use the DatacapEDSService shortcut in the Internet Explorer browser.
  - Verify that the data is shown in a JSON format, similar to the one shown in the following screen capture.



## Procedure 3: Register the EDS plug-in

- In a browser, start the IBM Content Navigator administration desktop. (ICN-Admin)
  - URL: <http://ecmedu01:9080/navigator/?desktop=admin>
  - User name: p8admin
  - Password: IBMFileNetP8
- Create a New plug-in.
  - In the admin desktop, click the Plug-ins icon in the left pane.
  - In the Plug-ins tab, click “New Plug-in”.

- c. In the New Plug-in page, select the “JAR file path” option and enter the location for the plug-in JAR file:

C:\Program Files (x86)\IBM\ECMClient\plugins\edsPlugin.jar



### Hint

In Windows Explorer, go to the location of the file. Copy and paste the directory to avoid typing errors.

3. Click Load.

- a. If the file path is valid, the page shows more information as defined for the plug-in.

A plug-in can be either a JAR file or a compiled class file.

**Important:** The IBM Content Navigator web application server must be able to access the plug-in file on the local file system or through a URL.

☒ JAR file path: ?

☐ Class file path: ?

Class name: ?

---

Name: External Data Services Support

---

Version: 2.0.3

- b. Scroll down and enter the value for the “External Data Service URL” field:

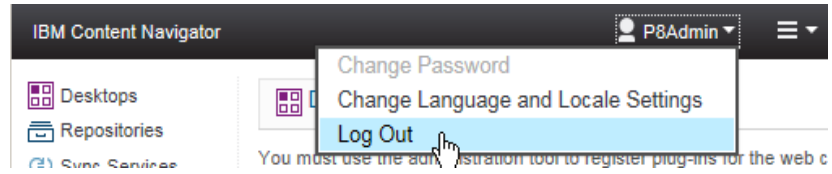
http://ecmedu01:9080/DatacapEDSService

\* External Data Service URL:

4. Click “Save and Close”.
5. Verify that the new plug-in is listed in the Plug-ins tab.

	Name	Version
◀	Datacap Navigator	Datacap 9.0_tm900.003.188
	External Data Services Support	2.0.3

6. Log out of IBM Content Navigator and close the browser.



**End of exercise**



## Exercise 2: Customize Datacap Navigator Job Monitor

### Introduction

The sample EDS application for Datacap Navigator contains customization for the Job Monitor page. You implemented the sample EDS in the previous exercise.

In this lab exercise, you explore the customized Job Monitor.

### Procedures:

[Procedure 1, "Check the customization in Job Monitor,"](#) on page 1-45

[Procedure 2, "Stop the applications,"](#) on page 1-48

---



#### Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.

---



#### Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first](#), on page 1-1 section at the beginning of this unit.

---

### ***Procedure 1: Check the customization in Job Monitor***

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: `susan`  
Password: `class`
  - c. Click Login. The Datacap view opens.
2. In the Job Monitor, if you do not have an item with the value: "aborted" for the "Status" column, do the next step.
3. Edit a Job.
  - a. Select a row.
  - b. Click "Edit Job" from the toolbar.
  - c. In the "Edit Job Properties" page, change the value of the Status field to "aborted". Select the value from the list.
  - d. Click Apply.

4. In the Job Monitor, check the customized behavior for a cell.
  - a. Click the refresh icon to refresh the monitor view.
  - b. The “Status” column shows the cell with the value: “aborted” in a different style (red color) as shown in the screen capture for the next step.
5. In the Job Monitor, check the customized behavior for a column.
  - a. The “Job Time” column shows the values as progress bars.

Start

Edit Job

Edit Batch

Delete

View History

↺

Filter

↻

	Queue ID	Batch	Task	Job	Status	Job Start	Job Time
●	21	20160523.000000	Verify	Navigator Job	hold	5/23/2016, 3:16 PM	100%
●	20	20160520.000012	Verify	Navigator Job	aborted	5/20/2016, 4:48 PM	100%
●	8	20160520.000000	Page ID	Navigator Job	hold	5/20/2016, 12:40 PM	100%
●	6	20160518.000004	Export	Navigator Job	Job done	5/18/2016, 6:11 PM	100%
●	9	20160520.000001	Export	Navigator Job	hold	5/20/2016, 12:41 PM	0%
●	10	20160520.000002	Verify	Navigator Job	hold	5/20/2016, 12:42 PM	0%
●	11	20160520.000003	Batch Profiler	Navigator Job	hold	5/20/2016, 12:50 PM	0%
●	17	20160520.000009	Export	Navigator Job	Job done	5/20/2016, 4:34 PM	0%
●	18	20160520.000010	Export	Navigator Job	Job done	5/20/2016, 4:40 PM	0%

6. Log out of the Datacap Navigator.



### Information

The code for this part of EDS implementation is in the “C:\DC9-Lab Exercises\EDS\UpdateObjectTypeServlet.Java” file.

## End of exercise

## Exercise 3: Configure data validation for a field

### Introduction

In this lab exercise, you register the EDS plug-in and test it in the IBM Content Navigator.

### Procedures:

[Procedure 1, "Check the default behavior in Datacap Navigator,"](#) on page 1-47

[Procedure 2, "Stop the applications,"](#) on page 1-48

[Procedure 3, "Check the ObjectTypes.json file,"](#) on page 1-49

[Procedure 4, "Add Validation for the Total Cost field,"](#) on page 1-50

[Procedure 5, "Start the applications,"](#) on page 1-50

[Procedure 6, "Test the EDS feature,"](#) on page 1-51

### ***Procedure 1: Check the default behavior in 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: susan  
 Password: class
  - c. Click Login. The Datacap view opens.
2. Scan a batch to check the default behavior.
  - a. In the Job Monitor, click "Navigator Scan" (Blue down arrow icon) from the Shortcut list on the left.
  - b. Click "Browse" next to the "Source" field.
  - c. In the "Choose File to Upload" window, go to C:\Datacap\TravelDocs\images
  - d. Select the `car1.tif` image.
  - e. Click Open and then click Scan.
  - f. Verify that image ID is listed in the "Batch Structure" on the left pane, and the image is shown in the viewer on the right.
  - g. Click Submit.
3. When the batch is completed, the "Scan" tab is closed, Upload, Page ID and Profiler task runs automatically. All the three steps take a few moments.
  - a. In Job Monitor, if you are batch is still at Upload task, click the "Upload" shortcut to complete the upload.

- b. In the Job Monitor page, click Refresh to see the status of your batch. Check that it is in Verify task.
  - c. Double-click your batch to open the Verify task.
4. In the Verify tab, scroll down, check the Total\_cost field. There is no red-asterisk for this field that indicates that the property is not a mandatory field.
  - a. Erase the value, and tab out of the field to test the mandatory field. No message or warning is shown now.

5. In the following procedure, you are going to implement EDS, so that this property is configured as a mandatory field.
  - a. Click Hold to Close the Verify task.
  - b. Log out of Datacap Navigator.



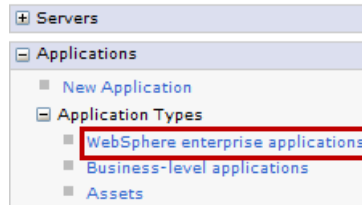
### Note

In a development environment, you copy the Sample EDS project into an IDE such as Eclipse, and edit the JSON files. Then, create a EAR file and deploy it to the Web Application Server. Since the purpose of this lesson is to demonstrate the EDS features and show the files that need to be edited, the JSON files are directly edited from the deployed folder.

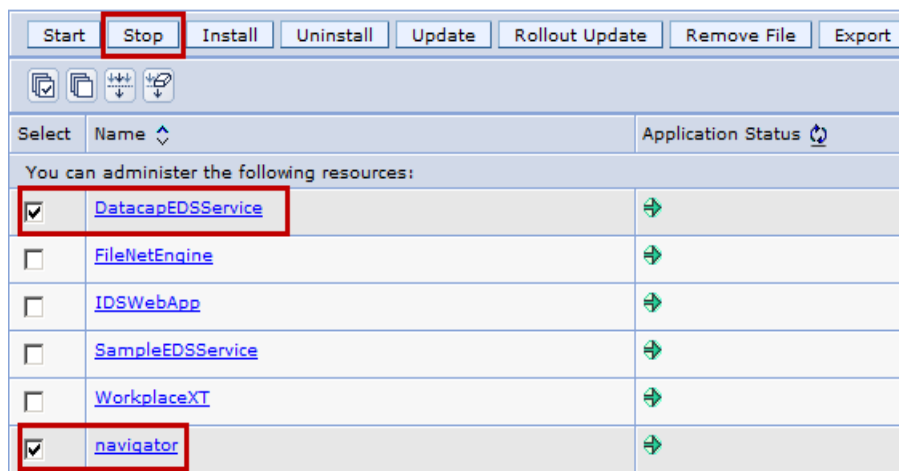
## Procedure 2: Stop the applications

Stop the navigator and DatacapEDSService applications in the WebSphere Application Server administration console, to edit the JSON file. When you start the applications again, the file gets reloaded.

1. In your browser, click the WAS admin link in the Bookmarks or go to the following URL:  
<https://ecmedu01:9043/ibm/console/logon.jsp>
  - a. Enter the account information and click *Login*.
    - User ID: p8admin
    - Password: IBMFileNetP8
2. In the left pane, expand Applications > Applications Types.
3. Click the “WebSphere enterprise applications” link.



1. Select "DatacapEDSService" and "navigator" in the Enterprise Applications page.



4. Click Stop and wait for the stop message to display.
5. Leave the WebSphere Application Server administration console open.

### Procedure 3: Check the ObjectTypes.json file

In this procedure, you check the sample ObjectTypes.json file for the TravelDocs class. This class entry in the EDS service instructs the EDS servlet to respond to any request from IBM Content Navigator for data for the Object class with the symbolic name of "TravelDocs".

1. Open the file.
  - a. In Windows Explorer, go to the EDS service deployment directory:
 

```
C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\
P8Node01Cell\DatacapEDSService.ear\DatacapEDSService.war\WEB-INF\classes
```
  - b. Open the ObjectTypes.json file in a text editor (Notepad++).
  - c. If you are prompted for any updates to Notepad++, ignore them for this lab.
2. Verify that the following line exists in the file.
 

```
{"symbolicName": "TravelDocs"},
```
3. Close the file.

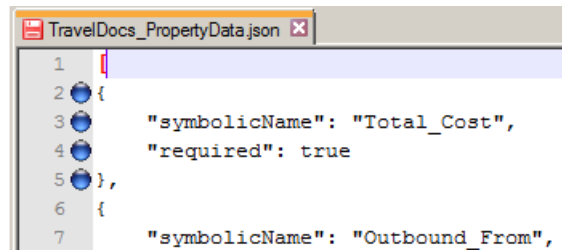
### Procedure 4: Add Validation for the *Total\_Cost* field

You edit the corresponding <Classname>\_PropertyData.json file to change the sample EDS plug-in behavior for that class. In this procedure, you edit TravelDocs\_PropertyData.json so that the “Total Cost” field status becomes a mandatory field.

1. Open the file.
  - a. In Windows Explorer, go to the EDS service deployment directory:
 

```
C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\
P8Node01Cell\DatacapEDSService.ear\DatacapEDSService.war\WEB-INF\classes
```
  - b. Open the TravelDocs\_PropertyData.json file in a text editor (Notepad++).
  - c. If you are prompted for any updates to Notepad++, ignore them for this lab.
2. Edit the file.
  - a. Add the following text at the beginning of the file, after the Square bracket “[”.
 

```
{
  "symbolicName": "Total_Cost",
  "required": true
},
```
  - b. The file now looks like the one in the following screen capture.



3. Save and close the file.



#### Hint

The solution TravelDocs\_PropertyData.json file in the C:\DC9-Lab Exercises\EDS folder for your reference. You can also copy and paste the text from this file.

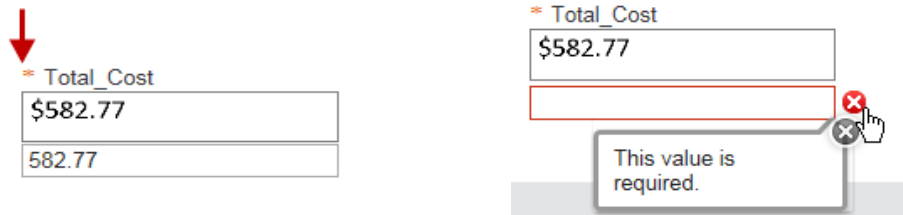
### Procedure 5: Start the applications

Restart the navigator and DatacapEDSService applications in the WebSphere Application Server administration console.

1. Select navigator and DatacapEDSService in the Enterprise Applications page and click Start. Wait for the Start message to display.
2. Logout of the administration console and close the browser.

## Procedure 6: Test the EDS feature

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=atacap`
  - b. Enter the following values:  
 User ID: susan  
 Password: class
  - c. Click Login. The Datacap view opens.
2. If you do not have any batches that are pending or on hold for the Verify task in the Job Monitor, then scan a new batch.
  - a. Follow Steps 1-3 in [Procedure 1, "Check the default behavior in Datacap Navigator,"](#) on page 1-47.
3. Otherwise, open the existing batch item (in Verify task step) that you scanned in [Procedure 1, "Check the default behavior in Datacap Navigator,"](#) on page 1-47.
4. In the Verify tab, scroll down, verify that the Total\_Cost field now has a red-asterisk that indicates that the property is a mandatory field.
  - a. Erase the value, and tab out of the field to test the mandatory field. You get a message “This value is required”.



5. Close the task.
  - a. Click Hold.
  - b. Log out of Datacap Navigator and close the browser.

## End of exercise

## Exercise 4: Create Choice Lists with Sample EDS

### Introduction

In this lab exercise, you add an external choice list to the “Pickup\_Location” field of a scanned document with EDS.

### Procedures:

[Procedure 1, "Stop the applications,"](#) on page 1-52

[Procedure 2, "Edit the JSON file to add a choice list,"](#) on page 1-52

[Procedure 3, "Start the applications,"](#) on page 1-54

[Procedure 4, "Test the choice list,"](#) on page 1-54

### ***Procedure 1: Stop the applications***

Stop the navigator and DatacapEDSService applications in the WebSphere Application Server administration console.

1. In your browser, click the WAS admin link in the Bookmarks or go to the following URL:  
<https://ecmedu01:9043/ibm/console/logon.jsp>
  - a. Enter the account information and click *Login*.
    - User ID: p8admin
    - Password: IBMFileNetP8
2. In the left pane, expand Applications > Applications Types.
3. Click the “WebSphere enterprise applications” link.
4. Select navigator and DatacapEDSService in the Enterprise Applications page and click Stop. Wait for the Stop message to display.
  - a. Refer to the [Procedure 2, "Stop the applications,"](#) on page 1-48 for more details.
5. Leave the administration console open for a later procedure.

### ***Procedure 2: Edit the JSON file to add a choice list***

1. Open the file.
  - a. In Windows Explorer, go to the EDS service deployment directory:  
`C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\
P8Node01Cell\DatacapEDSService.ear\DatacapEDSService.war\WEB-INF\classes`
  - b. Open the TravelDocs\_PropertyData.json file in a text editor (Notepad++).
2. Edit the file.
  - a. Add the following text at the beginning of the file, after the Square bracket “[”.



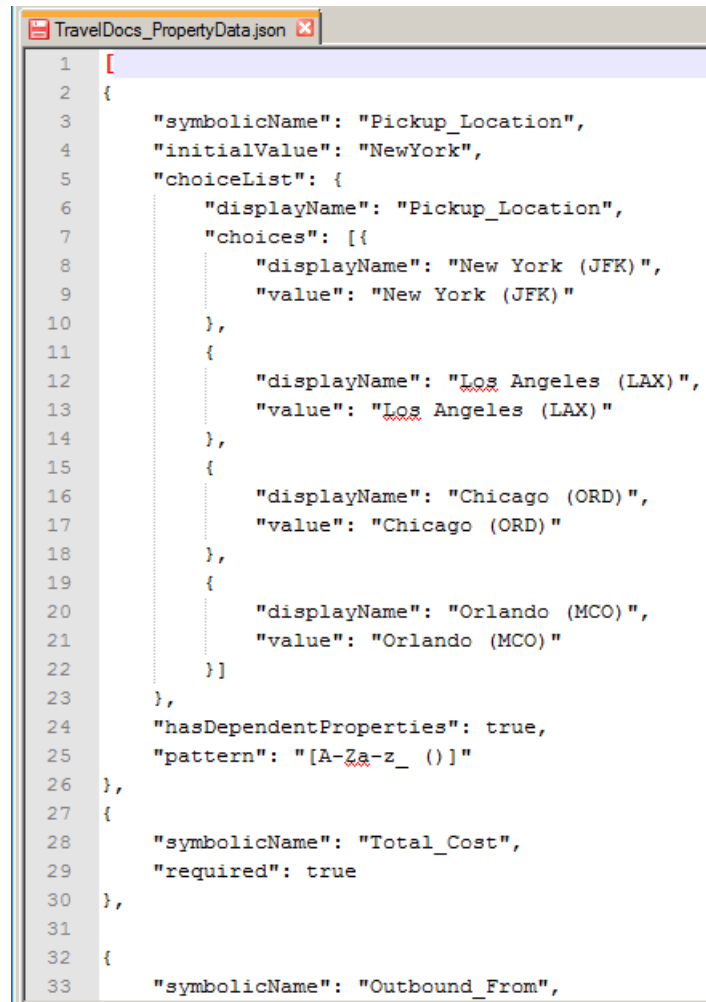
**Hint**

Use the following text for your reference. The solution `TravelDocs_PropertyData.json` file is available in the `C:\DC9-Lab Exercises\EDS` folder. You can copy and paste the text from the solution file to avoid any typing errors.

```
{
  "symbolicName": "Pickup_Location",
  "initialValue": "NewYork",
  "choiceList": {
    "displayName": "Pickup_Location",
    "choices": [{
      "displayName": "New York (JFK)",
      "value": "New York (JFK)"
    },
    {
      "displayName": "Los Angeles (LAX)",
      "value": "Los Angeles (LAX)"
    },
    {
      "displayName": "Chicago (ORD)",
      "value": "Chicago (ORD)"
    },
    {
      "displayName": "Orlando (MCO)",
      "value": "Orlando (MCO)"
    }
  ]
},
  "hasDependentProperties": false,
  "required": true
},
```

3. Save and close the file.

4. The file now looks like the one in the following screen capture.



```

1  [
2  {
3      "symbolicName": "Pickup_Location",
4      "initialValue": "NewYork",
5      "choiceList": {
6          "displayName": "Pickup_Location",
7          "choices": [{
8              "displayName": "New York (JFK)",
9              "value": "New York (JFK)"
10             },
11             {
12                 "displayName": "Los Angeles (LAX)",
13                 "value": "Los Angeles (LAX)"
14             },
15             {
16                 "displayName": "Chicago (ORD)",
17                 "value": "Chicago (ORD)"
18             },
19             {
20                 "displayName": "Orlando (MCO)",
21                 "value": "Orlando (MCO)"
22             }
23         ]
24     },
25     "hasDependentProperties": true,
26     "pattern": "[A-Za-z_ ()]"
27 },
28 {
29     "symbolicName": "Total_Cost",
30     "required": true
31 },
32 {
33     "symbolicName": "Outbound_From",

```

### Procedure 3: Start the applications

Restart the navigator and DatacapEDSService applications in the WebSphere Application Server administration console.

1. Select navigator and DatacapEDSService in the Enterprise Applications page and click Start. Wait for the Start message to display.
  - a. Refer to the [Procedure 5, "Start the applications,"](#) on page 1-50 for more details.
2. Logout of the administration console and close the browser.

### Procedure 4: Test the choice list

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: susan
  - Password: class
- c. Click Login. The Datacap view opens.
2. If you do not have any batches that are pending or on hold for the Verify task in the Job Monitor, then scan a new batch.
  - a. Follow Steps 1-3 in [Procedure 1, "Check the default behavior in Datacap Navigator,"](#) on page 1-47.
3. Otherwise, open the existing batch item (in Verify task step) that you scanned in [Procedure 1, "Check the default behavior in Datacap Navigator,"](#) on page 1-47.
4. In the Verify tab, scroll down, verify that the Pickup\_Location field now has a choice list. You should be able to select a value from a list of values that you entered in the JSON file.
  - a. It also has a red-asterisk that indicates that the property is a mandatory field.

The screenshot displays the Datacap Navigator interface. On the left, the 'Image Viewer' shows a car rental agreement for 'Car Rental #1'. The agreement details include pickup and return dates (Mon, Oct 4, 2010 to Fri, Oct 8, 2010), car type (Full size), and options (GPS Navigation, Child seat, Rent service). The total cost is \$582.77. On the right, the 'Field Details' section shows the IBM logo and a list of fields. The 'Pickup\_Location' field is highlighted with a red box, indicating it is a mandatory field (marked with a red asterisk). The dropdown menu for 'Pickup\_Location' is open, showing a list of locations: New York (JFK), Los Angeles (LAX), Chicago (ORD), and Orlando (MCO). Other fields visible include 'Return\_Location', 'Pickup\_Date', 'Return\_Date', and 'Total\_Cost'.

5. Close the task.
  - a. Click Hold.
  - b. Log out of Datacap Navigator and close the browser.

## End of exercise

# Lesson 1.7. Transactional Capture

## Overview

### Why is this lesson important to you?

As a Datacap system administrator, you install, configure, and customize Datacap Navigator. You can also configure Transaction Capture to do direct scan from IBM Content Navigator.

## Activities

[Exercise 1: Configure Transactional Capture](#), on page 1-57

[Exercise 2: Configure the Datacap application profile](#), on page 1-62

[Exercise 3: Test the Transactional Capture configuration](#), on page 1-65

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
P8 Administrator	p8admin	IBMFileNetP8
Datacap	susan	class



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Configure Transactional Capture

### Introduction

In this lab, you configure the IBM Content Navigator to scan the documents directly into the repository.

### Procedures:

[Procedure 1, "Check the default settings to add a document,"](#) on page 1-57

[Procedure 2, "Configure the menu,"](#) on page 1-58

[Procedure 3, "Assign the new menu to your custom desktop,"](#) on page 1-60

[Procedure 4, "Add the "Add to Batch" menu option,"](#) on page 1-61



#### Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.



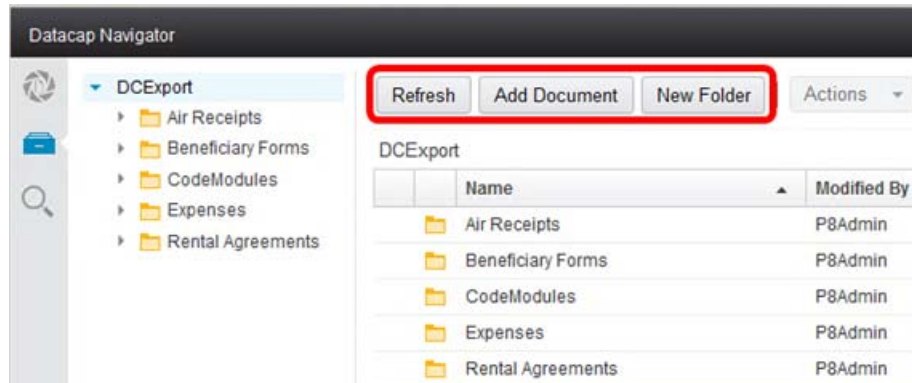
#### Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first](#), on page 1-1 section at the beginning of this unit.

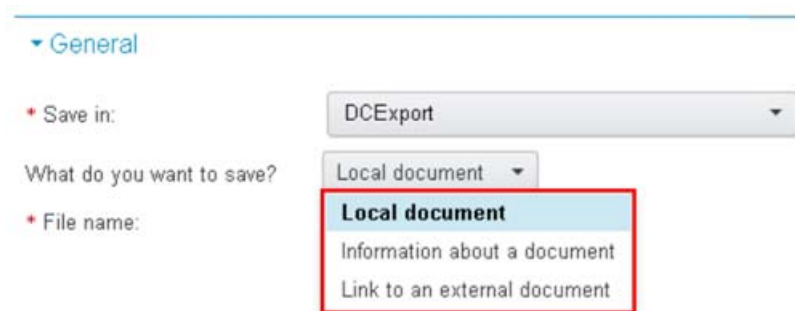
### ***Procedure 1: Check the default settings to add a document***

In this procedure, you check the default settings for adding documents in IBM Content Navigator.

1. In the Internet Explorer browser, open Datacap Navigator desktop.
  - a. Click the "DCN-Datacap" shortcut or enter the following URL:  
     `http://ecmedu01:9080/navigator/?desktop=datacap`
  - b. Enter the following values:  
     User Name: `susan`  
     Password: `class`
  - c. Click Login. The Datacap view opens.
2. Check the default menu items in the toolbar for the Browse View.
  - a. In the leftmost pane, click the "Open Browser View" icon.
  - b. Verify that you are able to expand the "DCExport" repository and see the available folders.
  - c. Observe the menu items available in the toolbar.



- d. You are going to add a menu item to the toolbar for scanning documents.
3. Check the default settings in the Add Document wizard.
  - a. Click "Add Document" in the toolbar.
  - b. Observe the three options in the list for the "What do you want to save?" field.



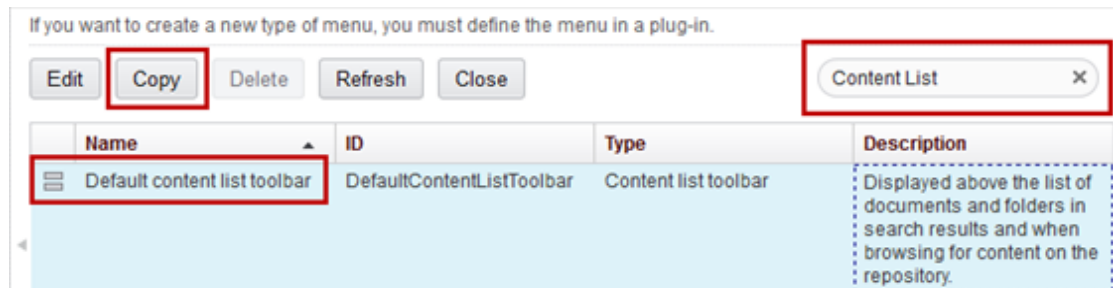
- c. After you configure the menu, "Document from scanner" option is added.
- d. Click Cancel to go back to the main page.
4. Log out of the Datacap Navigator. Click the user icon in the banner. Select "Log Out" from the list.

## Procedure 2: Configure the menu

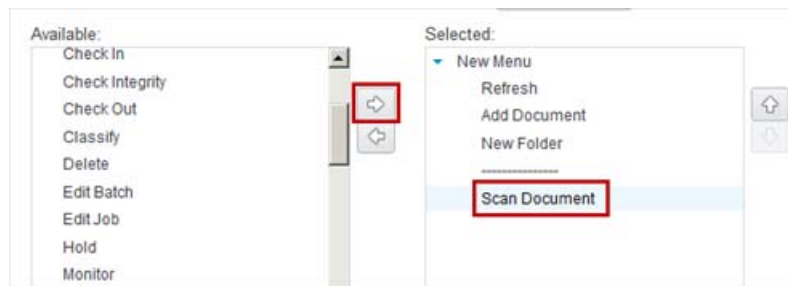
In this procedure, you configure a menu item for scanning in IBM Content Navigator.

1. Start Content Navigator administration Desktop.
  - a. In the Internet Explorer browser, click the "ICN Admin" shortcut.
  - b. Enter the following values:
    - User ID: p8admin
    - Password: IBMFileNetP8
2. In the left pane, select "Menus".

3. Make a copy of an existing menu.
  - a. In the “Menus” tab on the right pane, enter “Content List” in the search field.
  - b. From the search results list, select “Default content list toolbar”.
  - c. Select Copy.



4. Configure the new menu.
  - a. In the “New Menu” tab on the right pane, enter a name (Example: ScanMenu).
  - b. Scroll down and select “Scan Document” from the “Available” column and move to “Selected” Column. Use the forward arrow.



5. Replace the “Add Document” menu item.
  - a. There are 2 “Add Document” menu items with different IDs.

Menu item label: Add Document  
 ID: Import  
 Repository types: Content Manager, FileNet Content Manager, Content Management Interoperability Services (CMIS)  
 Applies when multiple items are selected: True  
 Applies when no items are selected: True  
 Required privileges: addDoc

Menu item label: Add Document  
 ID: TranCapAddDocumentPluginActionForICN  
 Repository types: Content Manager, FileNet Content Manager, Content Management Interoperability Services (CMIS)  
 Applies when multiple items are selected: True  
 Applies when no items are selected: True  
 Required privileges: addDoc  
 Plug-in: DatacapWebPlugin



### Hint

- The “Add Document” item with “ID: Import” is on the “Selected” pane.
- The “Add Document” item with “ID: TranCapAddDocumentPluginActionForICN” is on the “Available” pane.

Hover over each item to see the details for that menu item.

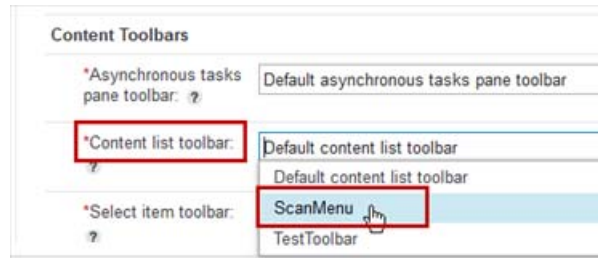
- Move the “Add Document” item (ID: Import) from the “Selected” pane to “Available pane” to remove it from the menu. Use the backward arrow.
  - Move the “Add Document” item (ID: TranCapAddDocumentPluginActionForICN) from the “Available” pane to “Selected” pane to include it in the menu. Use the forward arrow.
  - Click “Save and Close”.
  - In the Menus tab, search for the menu item that you added (ScanMenu) and verify that the menu is added.
- Leave the Content Navigator admin desktop open for the next procedure.

### ***Procedure 3: Assign the new menu to your custom desktop***

In this procedure, you replace the existing default Content list toolbar menu for this desktop with the new one.

- In the Desktops tab, select the “Datacap” desktop.
  - Click Edit.
  - Click the Menus tab.
- Select the new menu.
  - Scroll down and select the ScanMenu for the “Content Toolbar” > “Content list toolbar” field.





- b. Click “Save and Close”.

### ***Procedure 4: Add the “Add to Batch” menu option***

In this procedure, you configure the “Add to Batch” option.

1. Create a custom document context menu.
  - a. Click “Menus” from the left navigation pane.
  - b. Type “document context menu” in the search window.
  - c. Select the “Default document context menu” and click Copy.
  - d. Type “Custom document context menu” for the name.
  - e. In the available left column, select the “Add to Batch” option and click the right arrow to add it to the selected menu options.
  - f. Position the “Add to Batch” option immediately after the “Check In” option.
  - g. Click “Save and Close”.
2. Activate the custom menu on the Datacap Desktop.
  - a. Click “Desktops” from the navigation pane.
  - b. Click the “Datacap” desktop and click Edit.
  - c. Click the Menus tab.
  - d. Scroll down to the “Context Menus” section.
  - e. For the “Document context menu” select the “Custom document context menu”
  - f. Click “Save and Close”.
  - g. Logout of IBM Content Navigator and close the Internet Explorer browser.

---

## **End of exercise**

## Exercise 2: Configure the Datacap application profile

### Introduction

In the previous lab, you customized the IBM Datacap Navigator desktop for Transaction Capture and Direct Scan.

In this lab, you configure a profile for identifying pages and extracting metadata from images. You also create a document class to receive the metadata extracted from the document so that IBM Datacap Navigator can scan directly write documents into the repository.

### Procedures:

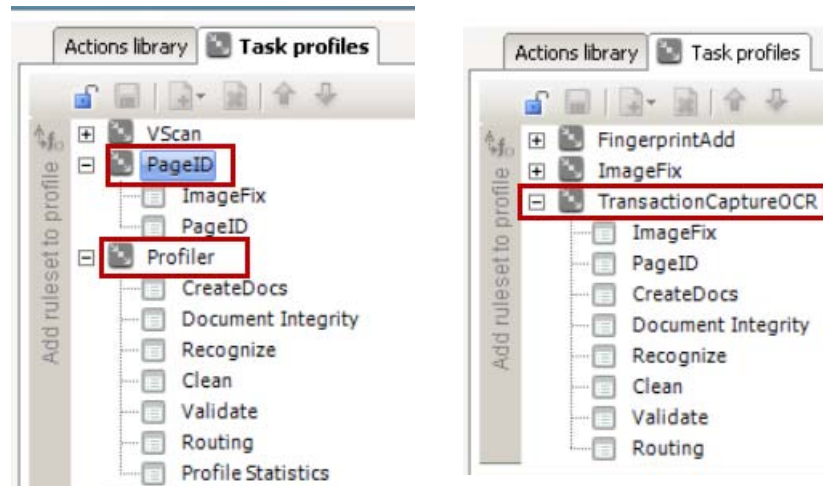
[Procedure 1, "Verify the TransactionCaptureOCR profile,"](#) on page 1-62

[Procedure 2, "Create Document Class for a TravelDocs Document,"](#) on page 1-63

### ***Procedure 1: Verify the TransactionCaptureOCR profile***

In this procedure, you check to see that you have correctly configured profile.

1. Open Datacap Studio.
  - a. Double-click Datacap Studio icon on the desktop.
  - b. Select the TravelDocs application and click Next.
  - c. Log in using susan/class/1 and click Finish.
2. Check the TransactionCaptureOCR profile.
  - a. In Datacap Studio, select the "Task profiles" tab in the rightmost pane.
  - b. In the "Task profiles" tab, expand the TransactionCaptureOCR profile and verify that it has the following rulesets selected in this order:
    - ImageFix
    - PageID
    - CreateDocs
    - Document Integrity
    - Recognize
    - Clean
    - Validate
    - Routing
  - c. In the "Task profiles" tab, expand the PageID and Profiler nodes.
  - d. Verify that all tasks listed in the PageID and Profiler profiles except the Profile Statistics task are included in the TransactionCaptureOCR profile as shown in the following screen captures.



## Procedure 2: Create Document Class for a TravelDocs Document

This procedure is done using the administration Console for Content Platform Manager. The information in table below is used in step 1 and step 3.

Use the table and the instructions below to create the document class

Flight Field table.

Field Names	Data Type
Vendor_Logo	String
Outbound_Date	Datetime
Outbound_From	String
Outbound_To	String
Return_Date	Datetime
Return_From	String
Return_To	String
Airfare	Float
Taxes	Float
Total_Cost	Float

1. Check your Air\_Ticket field names.
  - a. In your Datacap Studio, which is still open, expand the Document hierarchy.
  - b. Expand TravelDocs > Flight > Air\_Ticket.
  - c. Check the field names against the Air\_Ticket Field table.
  - d. Click Exit to close Datacap Studio.

2. Log in to the administration Console for Content Platform Manager.
    - a. Open the Internet Explorer browser and click the ACCE bookmark on the bookmarks toolbar.
    - b. Log in using p8admin/IBMFileNetP8.
  3. Define properties for the Flight Document Class.
    - a. Expand the Object Store node in the navigation pane.
    - b. Click the DCExport object store in the navigation pane.
    - c. Expand the Data Design node and click Property Templates.
    - d. Click New in the Property Templates tab in the right side pane.
    - e. Type the first field name from the Air\_Field table and click Next.
    - f. Select the Data type from the Air\_Field table for the property you are defining and click Next.
    - g. Click Next for the “Select Choice List or Marketing Set” option.
    - h. Click Next for the “Single or Multi-Value” option.
    - i. Click Finish and wait for the process to complete and click Close.
    - j. Repeat step 3.c to 3.h for each field in the Air\_Ticket Field table.
  4. Define the Document Class for the Flight Page.
    - a. Expand Classes under Data Design in the navigation pane.
    - b. Right-click Document and select New Class.
    - c. Type **Flight** for the document class name. **Doc class name must match DC DCO hierarchy document exactly.**
    - d. Click Next and then click Finish.
    - e. Click Open to open the Flight class.
    - f. Click the Property Definitions tab.
    - g. Click Add.
    - h. Scroll through the property list and click the checkbox for each of the properties that you are listed in the Air\_Ticket Field table and click OK.
    - i. Click Save and verify that:
      - There are 10 properties on the Property Definition page.
      - All the entries display DocVersion in the Table Name field.
      - All the entries display a value resembling the Property name in the Column name field.
    - j. Click Close, log out of the administration Console for Content Platform Engine, and close the browser window.
- 

## End of exercise

## Exercise 3: Test the Transactional Capture configuration

### Introduction

In the previous labs, you customized the IBM Datacap Navigator desktop, the Datacap application, and a document Class for Transactional Capture and Direct Scan.

In this lab, you test the Transactional Capture capabilities:

- Verify the Datacap Navigator configuration that you implemented in the earlier lab.
- Test the Read from scanner.
- Automatic extraction of metadata from images.
- Verify that documents are written directly to the repository with the metadata extracted from the Air\_Ticket page.

### Procedures:

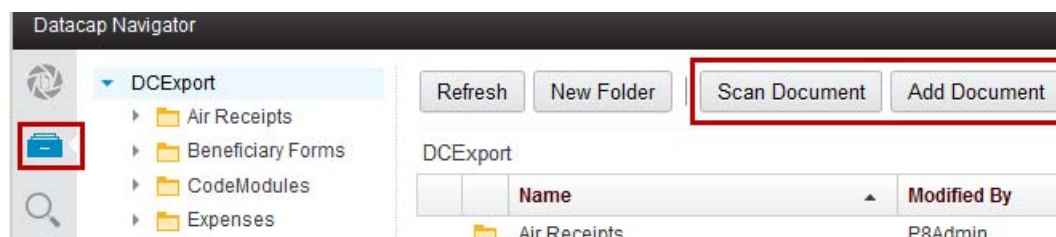
[Procedure 1, "Verify the custom menu,"](#) on page 1-65

[Procedure 2, "Test the "Scan Document" menu item,"](#) on page 1-66

[Procedure 3, "Test the "Add Document" menu item,"](#) on page 1-68

### Procedure 1: Verify the custom menu

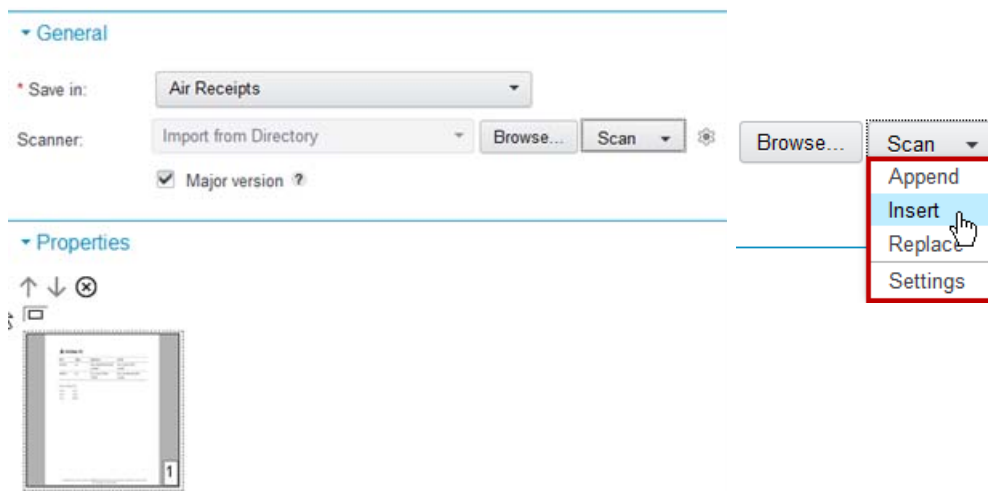
1. In the Internet Explorer browser, open your customized Datacap Navigator desktop.
  - a. Click the "DCN-Datacap" shortcut or enter the following URL:  
`http://ecmedu01:9080/navigator/?desktop=datacap`
  - b. Enter the following values:  
 User ID: susan  
 Password: class
  - c. Click Login. The Datacap view opens.
2. Check the menu item that you added in the toolbar for the Browse View.
  - a. In the leftmost pane, click the "Open browser view" cabinet icon.
  - b. Expand the "DCExport" repository and the available folders.
  - c. Verify that the toolbar now has an additional menu item "Scan Document" that you configured.
  - d. The "Add Document" menu item is replaced with the Datacap plug-in menu item.



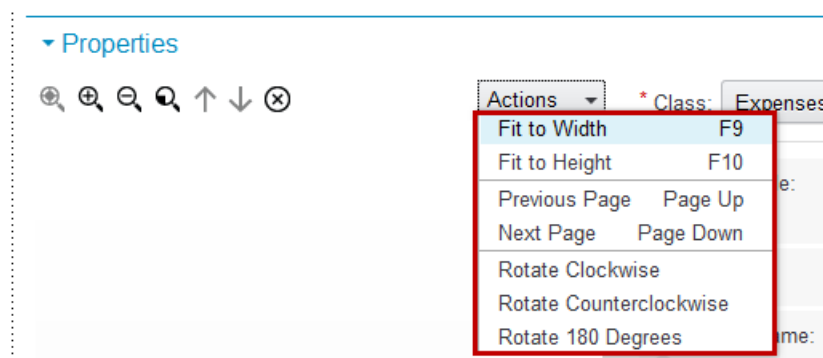
- e. Leave the Datacap Navigator desktop open.

## Procedure 2: Test the “Scan Document” menu item

1. Click the DCEExports node in the navigation pane.
2. Click Scan Document.
  - a. Notice that the user interface contains a section similar to Scan in Datacap Navigator.
3. For the “Save in” field, click the down arrow next to the DCEExport, and select the “Air Receipts” folder.
  - a. Click OK. The “Save in” field now shows “Air Receipts”.
4. For the “Scanner” section, click Browse.
  - a. Select an image (Flight1.tif) from the C:\Datacap\TravelDocs\images folder and click Open.
5. Click “Scan” and select the “Insert” option.
  - a. You can also choose “Replace” or “Append”.
  - b. The “Settings” option (gear icon next to Scan) shows the Scanner settings.
  - c. The thumbnail of the image is shown in the “Properties” section.



- d. Double-click the image to expand it. Check a list of actions available for the image.



6. On the right side of the Properties pane, For the “Class” field, click the down arrow and select “Flight”.
  - a. Click OK. The “Class” field now shows “Flight”.
  - b. Notice that the properties fields that you defined in the Flight Document Class are displayed, but the values are not extracted and in the property fields.

\* Class: Flight


Document Title: ?	tm000001.tif
Vendor_Logo: ?	
Return_To: ?	
Airfare: ?	
Outbound_To: ?	
Taxes: ?	
Outbound_From: ?	
Outbound_Date: ?	M/d/yyyy, h:mm a
Return_Date: ?	M/d/yyyy, h:mm a
Total_Cost: ?	
Return_From: ?	

7. Capture the page properties.
  - a. Click Capture and select Capture Current Page.
  - b. If you are prompted to log in use susan/class.  
Notice that the properties are populated from the Flight fields.
  - c. Change the Document Title to MyScannedDoc.tif.
8. Scroll down to the Security section.
  - a. Optionally, add more users.
9. Click Add in the right-most pane to complete the wizard.
10. Verify that the scanned document is added to the FileNet Content Manager repository folder.
  - a. In the Browse view, under the DCExport repository, click the Air Receipt folder where you added the document.
  - b. Check that a document with the name you entered (MyScannedDoc.tif) is listed.

## 11. Verify the scanned document properties.

- Single-click the document to view its properties.
- Check that in the Properties pane on the right pane, a list of properties with the values extracted from the Air\_Ticket page.

DCEXport &gt; Air Receipts

	Name
	MyScannedDoc.tif

▼ Properties <span>Edit</span>	
Class:	Flight
Document Title:	MyScannedDoc.tif
Vendor_Logo:	Airline #1
Outbound_From:	New York/Newark (EWR)
Outbound_To:	San Francisco (SFO)
Outbound_Date:	12/31/1969, 7:00 PM
Return_From:	San Francisco (SFO)
Return_To:	New York/Newark (EWR)
Return_Date:	12/31/1969, 7:00 PM
Airfare:	760.27
Total_Cost:	824.83

**Procedure 3: Test the “Add Document” menu item**


- In the Browse view, click the “Add Document” menu in the toolbar.
- The “Air Receipts” is still selected for the “Save in” field.
- For the “What do you want to save” section, click the down arrow next to “Local Document”.
- Verify that the “Document from scanner” option is listed. This option is available from the “Add Document” menu item that you configured. Select the option.

What do you want to save?

\* File name:

▼ Properties

Local document ▼

<b>Local document</b>
Information about a document
Link to an external document
<b>Document from scanner</b> 

- Scanner section is shown.



**Note**

The following steps are similar to the previous procedure: [Test the “Scan Document” menu item](#), on page 1-66.

5. For the “Scanner” section, click Browse.
  - a. Select an image (Flight1.tif) from the C:\Datacap\TravelDocs\images folder.
  - b. Click Open.
6. Click “Scan” and select the “Insert” option.
  - a. The image is shown in the “Properties” section.
7. For the “Class” field, click the down arrow and select “Flight”.
  - a. Click OK.
  - b. The “Class” field now shows “Flight”.
8. In the “Class” section, enter values for the fields.
9. Capture the page properties.
  - a. Click Capture and select Capture Current Page.  
Notice that the properties are populated from the Air\_Ticket page fields.
  - b. Change the Document Title to MyDocFromScanner.tif.

▼ Properties <span>Edit</span>	
Class:	Flight
Document Title:	MyDocFromScanner.tif
Vendor_Logo:	Airline #1
Outbound_From:	New York/Newark (EWR)
Outbound_To:	San Francisco (SFO)
Outbound_Date:	12/31/1969, 7:00 PM
Return_From:	San Francisco (SFO)
Return_To:	New York/Newark (EWR)
Return_Date:	12/31/1969, 7:00 PM
Airfare:	760.27
Total_Cost:	824.83

10. Scroll down to the Security section.
  - a. Optionally, add more users.
11. Click “Add” at the lower end in the right-most pane to complete the wizard.

12. Verify that the scanned document is added to the FileNet Content Manager repository folder.
  - a. In the Browse view, under the DCExport repository, click the Air receipts folder where you added the document.
  - b. Check that a document with the name you entered (MyDocFromScanner.tif) is listed.
13. Verify the scanned document properties.
  - a. Single-click the document to view its properties.
  - b. Check that in the Properties pane on the right pane, a list of properties with the values you entered are shown.

#### ***Procedure 4: Test the “Add to Batch”***

1. Select a file add to a batch.
    - a. Click the Air\_Receipts Repository folder.
    - b. Right-click the MyScannedDoc.tif file document that you just created.
    - c. Select “Add to Batch”.
    - d. Click Close on the Successful message screen.
  2. Check that the batch is created in the C:\Datacap\TraveDocs\batches folder.
  3. Logout of the Datacap Navigator and close the browser.
- 

#### **End of exercise**

# Lesson 1.8. Install and Customize Datacap Navigator

## Overview

### Why is this lesson important to you?

As a Datacap system administrator, you install, configure, and customize Datacap Navigator.

To do these tasks effectively, you must be familiar with the options available to customize the Datacap Navigator interface.

## Activities

- [Exercise 1: Install Datacap Navigator as a plug-in](#), on page 1-72
- [Exercise 2: Customize the Datacap Navigator desktops](#), on page 1-78

## User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
P8 Administrator	p8admin	IBMFileNetP8
Datacap	susan	class



### Note

Passwords are always case-sensitive.

---

## Exercise 1: Install Datacap Navigator as a plug-in

### Introduction

In this activity, you install Datacap Navigator as a plug-in to IBM Content Navigator. The plug-in is already installed on the student system to do the lab exercises for the previous lessons. You must delete the existing plug-in before the installation.

The installation of plug-in creates Datacap Navigator desktops for business users and administrators. It also creates a default Datacap repository.

### Procedures:

[Procedure 1, "Start Content Navigator administration Desktop,"](#) on page 1-72

[Procedure 2, "Delete the existing Datacap Navigator plug-in,"](#) on page 1-73

[Procedure 3, "Install the Datacap plug-in,"](#) on page 1-74

[Procedure 4, "Open the Datacap Navigator desktops,"](#) on page 1-76



#### Windows

You complete all the procedures for this lesson on the Server 2008 ECMEDU01 student system.



#### Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first](#), on page 1-1 section at the beginning of this unit.

---

### ***Procedure 1: Start Content Navigator administration Desktop***

1. In the Internet Explorer browser, click the "ICN Admin" shortcut or enter the following URL:

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

- a. Enter the following values:

User ID: p8admin

Password: IBMFileNetP8

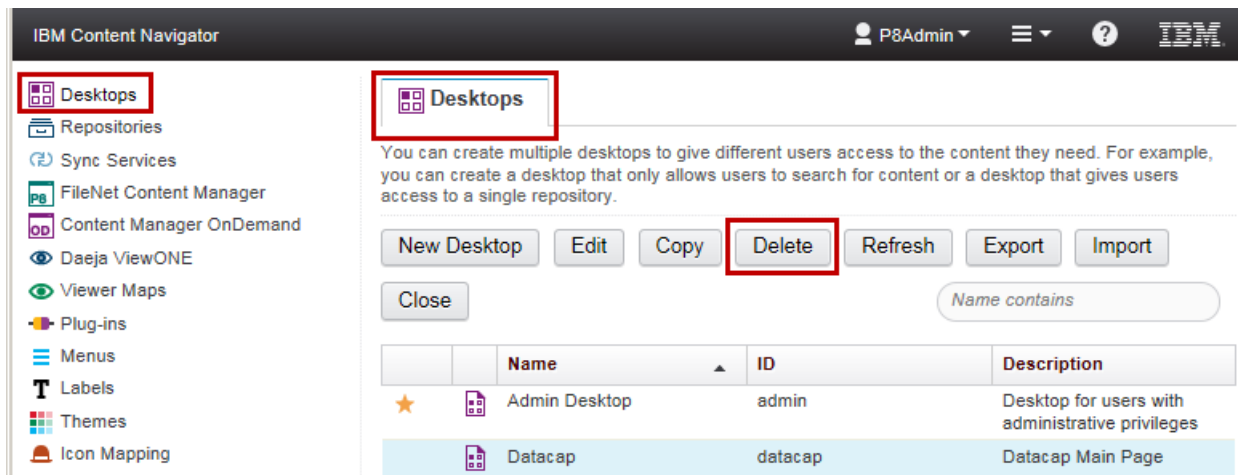
2. Click Login.

The administration view opens.

## Procedure 2: Delete the existing Datacap Navigator plug-in

You must delete the Datacap Navigator desktops that are referenced in the plug-in first. Then, delete the plug-in.

1. Delete the Datacap Navigator desktops.
  - a. Select “Desktops” from the left pane.
  - b. In the “Desktops” tab on the right pane, select “Datacap”.
  - c. Click “Delete” from the toolbar.



- d. When you are prompted to confirm the delete, click Delete in the message box.
  - a. In the “Desktops” tab, verify that the “Datacap” desktop is removed from the list.
2. Repeat Step 1 to delete the following Datacap Navigator desktops.
  - Datacap Admin Desktop.
  - Datacap Advance Desktop.
  - Datacap QuickLaunch Desktop.
  - a. In the “Desktops” tab, verify that the desktops are removed from the list.
3. Delete the Datacap Navigator repository.
  - a. Select “Repositories” from the left pane.
  - b. In the “Repositories” tab on the right pane, select “TravelDocs”.
  - c. Click Delete.
  - d. When you are prompted to confirm the delete, click Delete in the message box.
  - e. In the “Repositories” tab, verify that “TravelDocs” is removed from the list.
4. Repeat Step 3 to delete the “ExpenseDemo” repository.
5. Delete the “Datacap Navigator” plug-in.
  - a. Select “Plug-ins” from the left pane.
  - b. In the “Plug-ins” tab on the right pane, select “Datacap Navigator”.

- c. Click Delete.
- d. When you are prompted confirm the delete, click Delete in the message box.
- e. In the “Plug-ins” tab, verify that the plug-in is removed from the list.
6. Log out of the IBM Content Navigator administration Desktop and close the browser.
7. Restart WebSphere Application Server.
  - a. Open the “WebSphere Admin” folder on the Windows Desktop.
  - b. Double-click the `Stop the Server1.bat` file.
  - c. Wait for the Stop the server Command Window to close.
  - d. In the same folder, double-click the `Start Server1.bat` file.
  - e. Wait for the Start the server Command Window to close.
8. Restart Datacap Services.
  - a. Double-click the “Datacap Server Manager” shortcut on the Windows Desktop.
  - b. In the “Datacap Server Manager” window, select the “Service” tab.  
For the “Service name” field, the “Datacap Taskmaster Server” is selected.

**Hint**

If the Status shows that the server is not running, click the green arrow to start the server.

---

- c. Click the red icon to stop the server. Wait for the server to stop.
- d. Click the green arrow to start the server. Wait for the server to start.
- e. Click Close to close the Datacap Server Manager window.
9. Restart the Datacap Rulerunner Service.
  - a. Double-click the “Datacap Rulerunner Manager” shortcut on the Windows Desktop.
  - b. In the “Datacap Rulerunner Manager” window, select the “Rulerunner” tab.
  - c. Click “Start”. Wait for the server to start.
  - d. Click Close to close the window.

### ***Procedure 3: Install the Datacap plug-in***

1. Start Content Navigator administration Desktop.
  - a. In the Internet Explorer browser, click the “ICN Admin” shortcut.
  - b. Enter the following values:  
User ID: `p8admin`  
Password: `IBMFileNetP8`
  - c. For more details, see [Procedure 1, "Start Content Navigator administration Desktop,"](#) on page 1-72.

2. In the administration view, select “Plug-ins” from the left pane.
3. In the “Plug-ins” tab on the right pane, click “New Plug-in”.
  - a. In the “New Plug-in” tab, select the “JAR file path” option and enter the following value:  
C:\Datacap\tmlweb.java\DatacapWebPlugin.jar



### Hint

For Step 3a, open Windows Explorer and browse to the specified folder. Copy the location and the name for the plug-in JAR file to avoid any typing errors.

- b. Click Load. The details about the plug-in (Example: Name, version, actions, and Features) are shown.
- c. Scroll down and enter the following value for the “Default Application” field: TravelDocs
- d. Enter the following value for the “Default Datacap wTM URI” field:

http://ecmedu01:85/ServicewTM.svc

Review and confirm the values that you just entered using the following table:

Field	Value
JAR file path	C:\Datacap\tmlweb.java\DatacapWebPlugin.jar
Default Application	TravelDocs
Default Datacap wTM URI	http://ecmedu01:85/ServicewTM.svc

4. Click “Generate Default Desktop” at the end of the page.  
This step creates Datacap Navigator desktops.
5. Click “Save and Close” to save the changes and close the tab.
6. Verify that the plug-in that you created is listed in the Plug-ins tab.
  - a. Close the Plug-ins tab.
7. Log out of the Content Navigator administration Desktop and log back in.
  - a. Enter the following values:  
User ID: p8admin  
Password: IBMFileNetP8
8. Verify that the Datacap Navigator desktops are created.
  - a. In the right pane, select “Desktops” tab.

- b. Verify that a list of Datacap desktops are listed as shown in the following screen capture.

	Name	ID	Description
★	Admin Desktop	admin	Desktop for users with administrative privileges
	Datacap	datacap	Datacap Main Page
	Datacap Admin Console	dcadmin	
	Datacap Advance Desktop	dcAll	Contains Datacap Main Feature, Quick Launch Pane and Shortcut Pane
	Datacap QuickLaunch Desktop	dcQuickLaunch	Contains Datacap Main Feature, only enable quick launch pane by default
	Sample Desktop	SampleDesktop	

9. Log out of the Content Navigator client and close the browser.

#### ***Procedure 4: Open the Datacap Navigator desktops***

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 name: susan  
 Password: class
  - c. Click Login.
  - d. Verify that the Datacap view opens.
2. Verify the main sections in this view.
  - Shortcut pane - A list of all of shortcuts for different tasks:  
 Navigator Scan, Verify, FixUp, and Upload
  - Job Monitor view - A list of batches
3. Log out of Datacap Navigator.
4. Switch to the Datacap Navigator for administrators desktop.
  - a. In the Internet Explorer browser, click the “DCN-dcAdmin” shortcut or enter the following URL:  
<http://ecmedu01:9080/navigator/?desktop=dcadmin>
  - b. Enter the following values:  
 User name: susan  
 Password: class
  - c. Click Login.
  - d. Verify that administration view opens.



5. Explore the features that are available in this view.
    - Workflows
    - Groups
    - Users
    - Stations
    - Shortcuts
    - Panels
  6. Log out the Datacap Navigator and close the browser.
- 

## **End of exercise**

## Exercise 2: Customize the Datacap Navigator desktops

### Introduction

In the previous lab, you installed the Datacap Navigator as a plug-in to IBM Content Navigator and created default Datacap Navigator desktops for business users and administrators.

In this lab, you configure Datacap repositories for the applications. You also customize the desktops to include the repositories and features.

### Procedures:

[Procedure 1, "Configure Datacap repositories,"](#) on page 1-78

[Procedure 2, "Add repositories to Datacap Navigator desktop,"](#) on page 1-79

[Procedure 3, "Add features to Datacap Navigator desktop,"](#) on page 1-80

[Procedure 4, "Optional: Change the name and theme for the desktop,"](#) on page 1-81

[Procedure 5, "Test your customized Datacap Navigator desktop,"](#) on page 1-81

[Procedure 6, "Configure the Datacap Navigator for scanning,"](#) on page 1-83

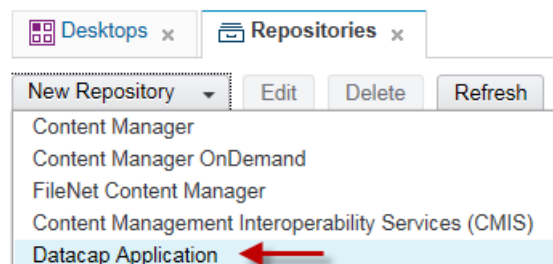
### Procedure 1: Configure Datacap repositories

In this procedure, you configure Datacap repositories for the applications and the repositories becomes available in IBM Content Navigator.

1. Start Content Navigator administration Desktop.
  - a. In the Internet Explorer browser, click the "ICN Admin" shortcut.
  - b. Enter the following values:
 

User ID: p8admin

Password: IBMFileNetP8
  - c. For more details, see [Procedure 1, "Start Content Navigator administration Desktop,"](#) on page 1-72.
2. In the administration view, select "Repositories" from the left pane.
3. In the "Repositories" tab on the right pane, click "New Repository".
  - a. Select "Datacap Application" from the list.



4. In the “New Repository” tab, enter the values for the fields with the data from the following table.
  - a. The ID field is populated automatically based on the Display name value.

Field	Value
Display name	ExpenseDemo
Datacap wTM URI	http://ecmedu01:85/ServiceWTM.svc
Application	ExpenseDemo
Default Station	1

5. Enable the “Configuration Parameters” tab.
  - a. Notice that the “Configuration Parameters” tab is not yet enabled. Click “Connect” at the end of the page.
  - b. Enter the following values for the repository when you are prompted to log in.
 

User name: `susan`  
Password: `class`
  - c. Click “Log In”.
  - d. Check that you are able to select the “Configuration Parameters” tab.



### Note

In the “Configuration Parameters” tab, you can customize the Job Attributes. The values in the “Selected Columns” pane are shown for the list of jobs of this repository in the Job Monitor.

6. Add or remove Job Attributes.
  - a. In the “Configuration Parameters” tab, move a column name (Example: “Batch Directory”) from the “Available Columns” to “Selected Columns” to add the item.
  - b. Move “Operator” from the “Selected Columns” to “Available Columns” to remove the item.
7. Change the order of the columns.
  - a. Select an item from the “Selected Columns”.
  - b. Use the up and down arrows to change the order of the columns.
8. Click “Save and Close”.
9. Verify that the repository that you created is listed in the “Repositories” tab.
  - c. Leave the administration desktop open for the next procedure.

## Procedure 2: Add repositories to Datacap Navigator desktop

1. In the administration desktop, Select “Desktops” tab in the right pane.
  - a. In the “Desktops” tab, select the “Datacap” desktop.
  - b. Click Edit.

The “Datacap” tab opens.

2. In the “Datacap” tab > “General” subtab, notice that “TravelDocs” repository that you configured when you installed the plug-in is used for authentication.
3. Add more repositories to this desktop:
  - a. In the “Datacap” tab, select the “Repositories” subtab.
  - b. From the “Available Repositories” pane, select “ExpenseDemo” and move to the “Selected Repositories” pane by clicking the arrow.
  - c. Repeat Step 3b, to move the following repositories: DCExport.

You can multi-select repositories with Shift and click.
4. Click “Save”.
5. Leave the “Datacap” tab open for the next procedure.

### Procedure 3: Add features to Datacap Navigator desktop

1. In the “Datacap” tab, select the “Layout” subtab.
2. Under the “Displayed features” section, select the “Browse” feature.
  - a. On the rightmost pane, select “DCExport” (FileNet Content Manager repository) for the “Default repository” field.
  - b. For the “Repositories” field, clear all repositories except “DCExport”.



#### Information

If you select “Datacap” type repositories for Browse or search, it produces an error because Datacap repositories are not designed for Content Management. “DCExport” is a FileNet Content Manager type repository that is configured for document Browse and Search)

\* Layout: ? ecm.widget.layout.NavigatorMainLayout

\* Displayed features: ? Move Up Move Down

	Feature
<input checked="" type="checkbox"/>	Datacap Main Page
<input checked="" type="checkbox"/>	Browse
<input type="checkbox"/>	Search
<input type="checkbox"/>	Home
<input type="checkbox"/>	Teamspace

Feature configuration

\* Default repository: ? DCExport

Repositories: ?

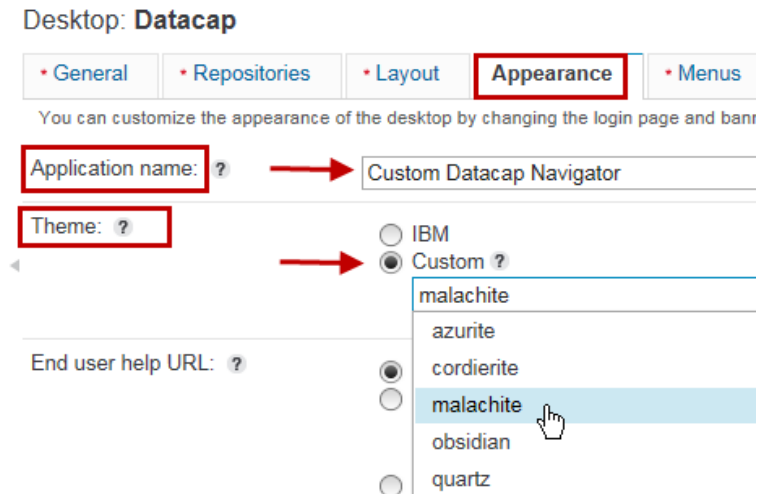
	Repository Name
<input type="checkbox"/>	TravelDocs
<input type="checkbox"/>	ExpenseDemo
<input type="checkbox"/>	Medical Claims
<input checked="" type="checkbox"/>	DCExport

- c. Scroll down. In the “Additional Desktop Components” section, observe that you can configure thumbnails, Global toolbar, and Status bar to show in your desktop.
  - d. Scroll up and click the “Search” check box, then repeat Step 2 for the Search feature.
3. Click “Save”.

4. Leave the “Datacap” tab open for the next procedure.

#### **Procedure 4: Optional: Change the name and theme for the desktop**

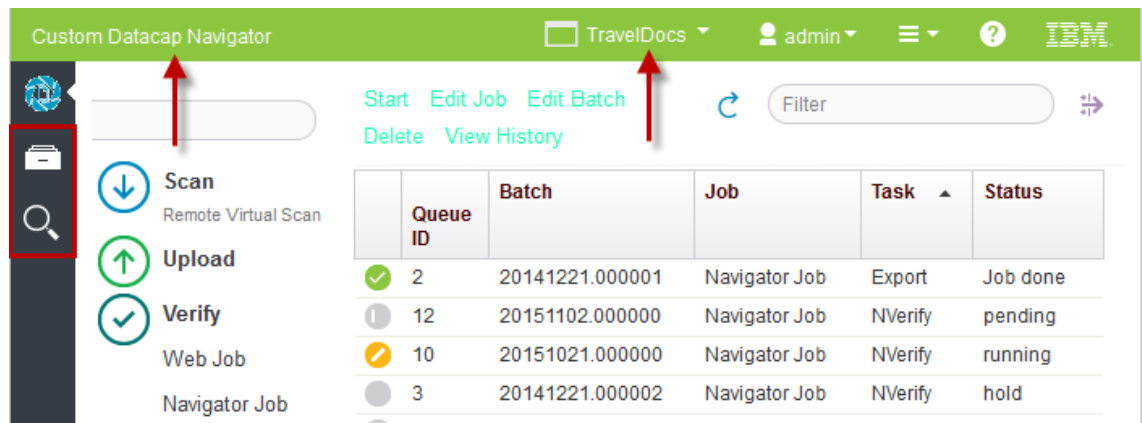
1. In the “Datacap” tab, select the “Appearance” subtab.
2. For the “Application name” field, edit the default name (Example: Custom Datacap Navigator).
3. For the “Theme” field, select the “Custom” option.
  - a. Select a custom theme from the list (Example: malachite).



4. Click “Save and Close”.
  - a. Log out of the Content Navigator client and close the browser.

#### **Procedure 5: Test your customized Datacap Navigator desktop**

1. In the Internet Explorer browser, open your customized Datacap Navigator desktop.
  - a. Click the “DCN-Datacap” shortcut or enter the following URL:  
`http://ecmedu01:9080/navigator/?desktop=datacap`
  - b. Enter the following values:  
 User name: susan  
 Password: class
  - c. Click Login. The Datacap view opens.
2. Verify the banner theme and application name for your customized desktop:
  - a. Banner color: green
  - b. Application name on the banner: Custom Datacap Navigator
3. Verify the repositories that you added:
  - a. A list of Datacap repositories are shown in the banner with the default repository “TravelDocs” selected.



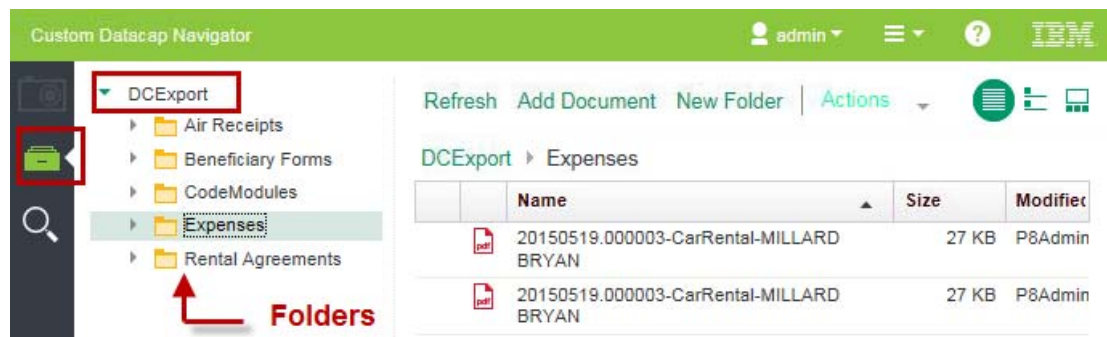
4. Verify the Browse feature that you configured:

- In the leftmost pane, click the “Open browser view” cabinet icon to access the Browse View.
- Verify that you are able to expand the “DCExport” repository and see the available folders.
- Select the “Expenses” folder.
- Verify that you are able to view the documents on the right pane (Example: Document Name - <date>.<Seq#>-CarRental-MILLARD BRYAN).



**Hint**

The number of documents that you have on your image might be different based on how many batches that you ran in all other labs.



- Optionally, select the “magnifying glass” icon to check the Search View that you configured.
  - Leave the desktop opened for the next procedure.

## Procedure 6: Configure the Datacap Navigator for scanning

This step is a one time configuration that you must do when you use the Datacap Navigator for the first time for scanning the images.

1. In your customized desktop, click the Datacap View icon (first icon) on the far left pane.
  - a. If you are prompted to log in, enter the following login credentials.  
User ID: `susan`  
Password: `class`
  - b. Datacap view is opened.
2. Click the “Navigator Scan” shortcut.
  - a. Verify that the “Browse” button (next to the “Source” field) is visible.
3. Log out of the Datacap Navigator desktop and close the browser.
  - a. Skip the rest of the steps in this procedure.

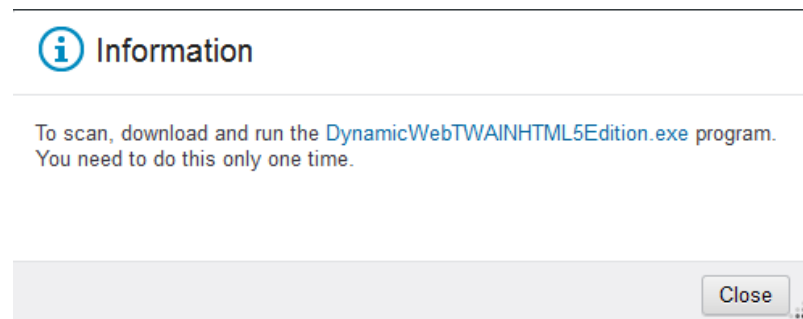
You completed this lesson.



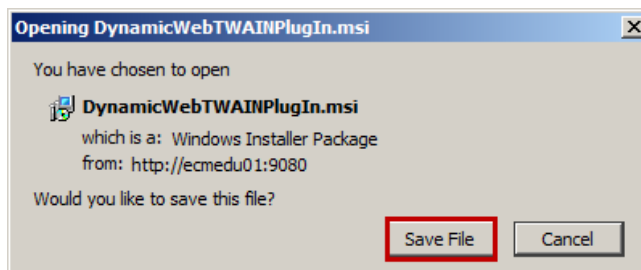
### Hint

Because your system was already configured for the Scan, you might not be prompted to configure again.

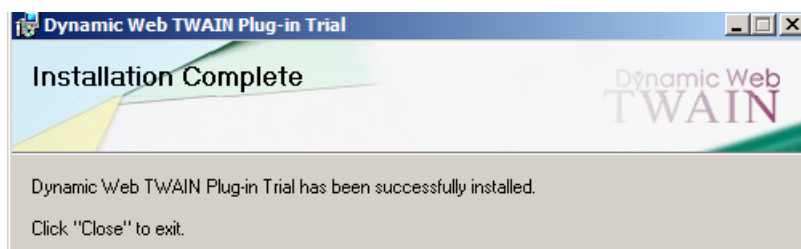
- 
- b. If you are prompted with the information window as shown in the following screen capture, continue with the steps in this procedure:



4. Click the “DynamicWebTWAINHTML5Edition.exe” link to download the file from the browser.
  - a. Click “Save File” when you are prompted.



5. The file is saved in the "C:\Users\Administrator\Downloads" folder.
  - a. Double-click the DynamicWebTWAINPlugInDown.msi file to run the application.
  - b. In the "Dynamic Web TWAIN Plug-in" window that opens, follow the wizard to complete the steps.
  - c. Click Next twice and then Close.



6. Verify that the "Browse" button (next to the "Source" field) is visible in the Scan tab.
7. Log out of the Datacap Navigator desktop and close the browser.

---

## End of exercise



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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 Content Navigator, IBM Datacap 9.0.1 The server image also has Tivoli, DB2, WebSphere Application Server, and Visual Studio.

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.

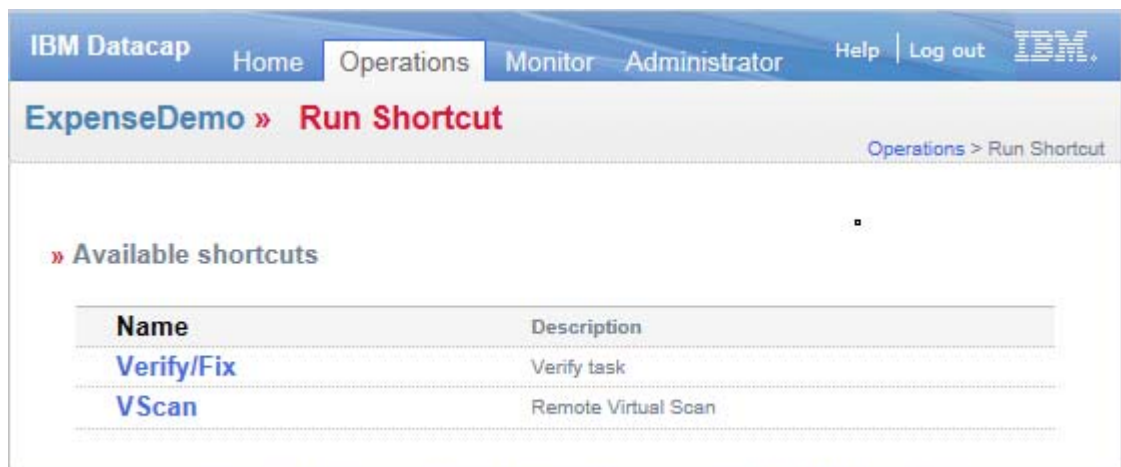
### Procedure 5: Check the IBM Navigator

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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