

Course Exercises Guide

IBM Datacap 9.0.1: FastDoc Server mode

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Unit 1. FastDoc Datacap Server mode

Estimated time

08:00

Unit overview

This unit contains these lessons.

Lessons

[Lesson 1.1, "Introduction to FastDoc Datacap Server mode," on page 1-3](#)

[Lesson 1.2, "Create an application with Form template," on page 1-8](#)

[Lesson 1.3, "Create batch structure," on page 1-11](#)

[Lesson 1.4, "Configure form template rulesets," on page 1-14](#)

[Lesson 1.5, "Define fingerprints and test rulesets," on page 1-17](#)

[Lesson 1.6, "Populate fields with keyword lookup," on page 1-25](#)

[Lesson 1.7, "Configure validate field rulesets," on page 1-29](#)

[Lesson 1.8, "Export to IBM FileNet Content Manager," on page 1-34](#)

Unit dependencies

The activities in this unit must be done in the Presented order.

This unit is dependent upon completing "Basic application".

Requirements

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

Do this first

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

Type	User ID	Password
Operating system	Administrator	passw0rd

2. Start the Datacap Server.
 - a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.

The Datacap Server Manager window is shown.

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

System check

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

Use procedures in Appendix A to check the following components:

1. P8 Content Platform Engine
Procedure 2, "Check the Content Engine," on page A-4
2. IBM Content Navigator
Procedure 5, "Check the IBM Navigator," on page A-5
3. Datacap Content Navigator
Procedure 6, "Check the Datacap Components," on page A-5
4. See Appendix A for additional procedures to Start, Check, and Restart components on the Student system.

Lesson 1.1. Introduction to FastDoc Datacap Server mode

Overview

Why is this lesson important to you?

As a Datacap business analyst, you must often quickly scan new data batches without having to go through a long development cycle.

To do these tasks effectively, you must be familiar with the FastDoc Datacap Server mode interface.

Activities

- Exercise 1: Explore FastDoc Datacap Server mode, on page 1-4

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin



Note

Passwords are always case-sensitive.

Exercise 1: Explore FastDoc Datacap Server mode

Introduction

This activity demonstrates opening FastDoc and viewing the application development capabilities.

Procedures

Procedure 1, "Browse the Process Batches view," on page 1-4

Procedure 2, "View document configuration options," on page 1-4



Procedure 3, "View workflow configuration options," on page 1-6

Procedure 1: Browse the Process Batches view


1. Log in to FastDoc (Admin) in Datacap Server mode.
 - a. Click Start > All Programs > IBM Datacap Developer tools > Datacap FastDoc (Admin).
 - b. Select Datacap Server on the Welcome to Datacap window.
 - c. For the three authentication fields type:

Application: FastForm
 User ID *admin*
 Password *admin*
 Station ID *1*
 - d. Click Login.
2. View Batch process shortcuts

Notice that the FastDoc starts in the batch processing view. Shortcuts are defined for each task profile that is defined for all jobs. You see all of the tasks because you are logged in as the administrator. Typically as a user you would see only the tasks that are run manually. Example Scan and Verify. The blue icon in the left navigation bar indicates the view that is displayed.


- a. Hover the cursor over the blue icon  in the left navigation bar. The annotation "*Process batches of documents*" is visible.
- b. Hover the cursor over the  icon on the toolbar. The annotation "*Application Wizard*" is visible.

The Application Wizard is used to creating new application either by copying an existing application or by copying saved templates.

- c. Click or right-click the  icon on the toolbar. The annotation "*Logout*" is visible. Use this option when you want to logout of FastDoc.

Procedure 2: View document configuration options

This view of the FastDoc Datacap Server mode is only visible in the FastDoc (Admin) interface.

1. View Batch Structure pane and batch structure configuration option.
 - a. Hover the cursor over the  icon in the left navigation bar.

The annotation “*Configure documents, pages, and fields*” is visible.

- b. Click the  icon to switch to the “*Configure documents, pages, and fields*” view.

When the FastForm batch object is selected in the batch Structure pane, the control actions are:

- Save
- Reload
- Add Document...
- Add field...

Save and reload become active only when changes are made.

- c. Click "Document" in the Batch Structure pane.

The list now expands. The document type "Document" contains one page type "Page".

The only active option is Add Pages... when the document object is selected.

The FastForm application is a fresh application that is created from a template. The templates are configured with some generic default values. These default configurations are best left unaltered. You can add document, page and field items as required for your application.

2. View the Properties pane.

In the Properties pane, there are three tabs: Settings, Ruleset, and Fingerprint. These tabs are where you enter the configuration options and test your settings.

- a. Click the Document and then the Page object in the Batch Structure pane.
- b. Click the Ruleset tab.
- c. Select Recognize Pages and Fields from the Ruleset list.
 - The configurable properties of the Recognize Pages and Fields ruleset are displayed in the properties pane.
 - There is a Test pane on the right that can be used to verify structure objects and configured ruleset options to verify that they are producing the expected results

3. View the Fingerprints pane.

- a. Click the Fingerprints tab.

In the fingerprints pane you can:

- Define fingerprint classes.
- Define fingerprint images, which:
 - o Links an image to a fingerprint ID.
 - o Selects a fingerprint class.
 - o Associate the image with page type.


Procedure 3: View workflow configuration options

This view of the FastDoc Datacap Server mode is only visible in the FastDoc (Admin) interface.

1. Select the Configure workflow view.

- a. Hover the cursor over the  icon in the left navigation bar.

The annotation “Configure workflows” is visible.

- b. Click the  icon to switch to the “Configure workflow” view.

There are three panes:

- Jobs - Left side.
- Profiles - Center.
- Rulesets - Right side.

2. Observe the Jobs and Profiles interaction.

- a. Click the DemoSingleTiffs job in the Jobs pane.
- b. Click the profiles pane size control slider.



- c. Adjust the slider so you can see all of the profiles for the selected job.
- d. Click each of the defined jobs and observe the profiles that are defined for each job. (Readjust the slider of pan the profiles pane to view all of the defined profiles for each job).

3. Observe the Ruleset pane.

The Ruleset pane contains a list of all of the rulesets that can be used to configure profiles.

- a. Hover over the Convert Files To Images ruleset in the Rulesets pane.
 - The ruleset is highlighted with a green background and an annotation is displayed.
- b. Scroll down to the Export ruleset.
 - There is no annotation.

Note: Rulesets with a dot at the extreme right identify that a notation is present.

4. Configure Ruleset options.

- a. Click the DemoSingleTiffs job in the Jobs pane.
- b. Click the “Document Integrity” ruleset under the “PageID” task. This ruleset is a General ruleset.

Response? No reaction.


- c. Click the Image Enhancement ruleset under the PageID task. This ruleset is a UI or Compiled ruleset.

Response? The window switches back to the Configure Documents, pages, and fields view. The Ruleset tab is selected and the Image Enhancement ruleset properties are being displayed.

- d. Click the RuleSet list.

Notice: The Document Integrity ruleset is not in the list.

Conclusion: Only UI or Compiled rulesets are configurable in FastDoc.

- e. Click the Document object and then click the Page object in the Batch Structure pane.
 - f. Click the Ruleset list and select the Image Enhancement Ruleset.
 - g. Hover over the Deskew option and notice that a description and an example of the deskew process is annotated.
 - h. Hover over some of the other options and view the annotations.
5. Log out of FastDoc.
- a. Click logged in user icon  Admin and select Logout.
 - b. Close the FastDoc window.
-

End of exercise

Lesson 1.2. Create an application with Form template

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.

To do this operation, you must be familiar with using the FastDoc user interface in the Datacap Server mode to configure documents capture types. In this lesson, you focus on using the Form template to configure a new application.

Activities

- Exercise 1: Create an application with the Form template, on page 1-9

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Exercise 1: Create an application with the Form template

Introduction

In this exercise, you create a FastDoc application and then configure it to recognize and process a new type of document. You scan a sample document and show FastDoc how to find and verify the data fields.

Procedures

Procedure 1, "Check WebSphere Application Server," on page 1-9

Procedure 2, "Create and configure an Application," on page 1-9

Procedure 1: Check WebSphere Application Server

IBM FileNet Content Manager runs as a WebSphere application. This lesson is the first lesson that requires IBM FileNet Content Manager so you must verify that WebSphere Application Server is started. It should start when you ran the Do this first section at the beginning of the class.

1. Verify that the IBM FileNet P8 services are available.
 - a. Click the Internet Explorer icon in the program icon tray.
 - b. Click the ICN Ping Page shortcut on the bookmark bar.
 - c. Verify that IBM Content Navigator Pink Page appears.
2. If the Ping Page does not appear, then run the procedure in the Do this first section at the beginning of the class or follow the procedure in Appendix A

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



Procedure 2: Create and configure an Application

Use the Application Wizard to create an application from the Form template and name the application FastBuild.

Application Create Data

Item	Value
Wizard Mode	Create an RRS application.
Application Name	FastBuild
Datacap Folder	C:\Datacap
Root folder on target system	C:\Datacap
Application Template	FormTemplate

1. Start Datacap FastDoc (Admin) interface and log in to the Local mode.
 - a. Double-click the FastDoc (Admin) icon on the Desktop.
 - b. Click Local.
 - c. Click Login.

2. Create the application.
 - a. Click the Datacap Application Wizard icon  on the right side of the header bar.
 - b. Click Next.
 - c. Click Create a new RRS application.
 - d. Click Next.
 - e. Type the Application name.(From Data table)
 - f. Select FormTemplate.
 - g. Click Finish.
 - h. Verify that no errors or warnings are shown on the Summary window.
 - i. Click Close.
 3. Log out of FastDoc Local mode.
 - a. Click logged in user icon  Local and select Logout.
 - b. Close the FastDoc Window.
 4. Check application paths for the new FastBuild application.
 - a. Open the Datacap Application Manager. Double click the icon on the desktop.
 - b. Select the FastBuild application in the navigation panel on the left.
 - c. On the Main tab, make sure that none of the paths are still pointing at the template folder. They should all be pointing at C:\Datacap\FastBuild and not C:\Datacap\Template\FastBuild. If any paths are incorrect, then correct them (especially the Database connection strings).
 - d. Close the Datacap Application manager.
-

End of exercise

Lesson 1.3. Create batch structure

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.

To do this operation, you might be called upon to configure an application in FastDoc after it is created from a template with the Application Wizard. Or, you might be required to add the document recognition, and validation configuration for a document. In this lesson, you learn Configuring the Document Hierarchy for the document.

Activities

- Exercise 1: Create the batch structure, on page 1-12

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Exercise 1: Create the batch structure

Introduction


In this exercise, you create the batch structure for a document. You define a document type, define a page type, and then define the fields on the page that need to be extracted.

Procedures

Procedure 1, "Configure a Document Type.," on page 1-12

Procedure 1: Configure a Document Type.

1. Log in to Datacap FastDoc (Admin) in the Datacap Server mode.
 - a. Click Datacap Server.
 - b. On the Welcome to Datacap window:

Select Application: FastBuild
 Type User: admin
 Type Password: admin
 Type Station: 1
 - c. Click Login
2. Add Document Type.
 - a. Click the icon for Configuring Documents and Pages. 
 - b. In the Batch Structure Pane, select FastBuild.
 - c. Click Add Document... to add a Document Type.
 - d. Type the Document Type name Bene_Document.
 - e. Click the "Use rulesets from" check box to enable the option.
 - f. Select Document.
 - g. Click Add to add this document type.
3. Add Page Type.
 - a. Select Bene_Document in the Batch Structure pane and click "Add Page".
 - b. Type the Page type name Bene_Page.
 - c. Click the "Use rulesets from" check box to enable the option.
 - d. Select Page.
 - e. Click Add to add this page type.
4. Set Document Integrity Rule.
 - a. In the Batch Structure Pane, select the Bene_Page.


- b. Type the following values.

Minimum: 1
Maximum: 1
Order: 1

5. Click Save.
6. Add Fields to the new page type.
 - a. Click the Bene_Page page from Batch Structure.
 - b. Click Add Field.
 - c. Enter Field type: Employee_Name.
 - d. Click Add. The field is added to the Batch Structure list.
 - e. Repeat step 6b - 6d to add the rest of the fields in the field table.

Field Data Table

Employee_Name
SSN
Date_Of_Birth
Employer
Group_Number
Home_Phone_Number
Home_Address
City
State
Zip_Code

- f. Click Save to save the new document, page, and fields.
7. Log out of FastDoc and close the window.
 - a. Click the  admin on the toolbar and select logout.
 - b. Close the FastDoc Window.

End of exercise

Lesson 1.4. Configure form template rulesets

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.

You are required to configure an application in FastDoc after it is created from a template with the Application Wizard. In this lesson, you learn to configure the page identification and field recognition rulesets.

Activities

- Exercise 1: Configure form template rulesets, on page 1-15

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Exercise 1: Configure form template rulesets

Introduction


In this exercise, you configure the Recognize Pages and Fields ruleset for page OCR recognition. You configure the Import Files ruleset to use VScan to read all the files in the specified folder.


Procedures

Procedure 1, "Configure Rulesets," on page 1-15

Procedure 1: Configure Rulesets

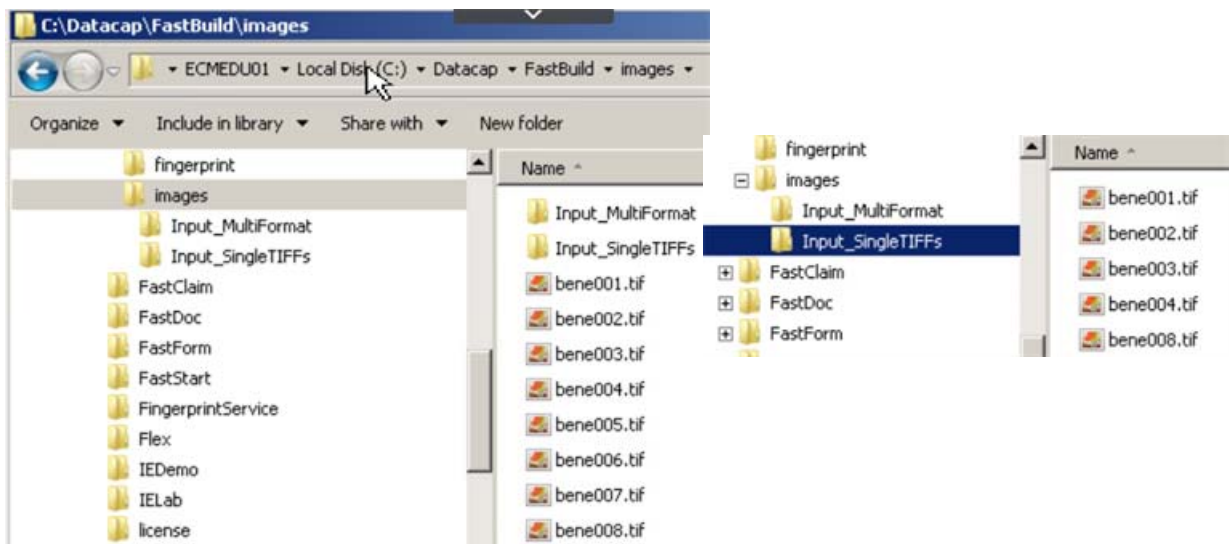
Implement basic OCR recognition of your claim document fields.

1. Log in to Datacap FastDoc (Admin) in the Datacap Server mode for the FastBuild application, as you did for the previous lesson. User = admin, password = admin.
2. Configure OCR Recognition for the Bene_Page.
 - a. Click the icon for Configuring Documents and Pages. 
 - b. Click Bene_Document in the Batch Structure pane.
 - c. Click Bene_Page in the Batch Structure pane.
 - d. Click Ruleset tab.
 - e. Select the Ruleset Recognize Pages and Fields.
 - f. Check the following options.
 - Enable: Read Page
 - Enable: Load Zones for fields
 - Enable: Read Machine print on page.
3. Configure the fields.
 - a. Select the field Employee_Name in the Bene_Page under the Batch Structure.
 - b. Select the Ruleset Recognize Pages and Fields.
 - c. Check the following options.
 - Enable: Read Field.
 - Enable: Add page recognition text to the zone.
 - d. Repeat step 3a to 3c for all fields.
 - e. Click Save.
4. Configure Import Files Directory.
 - a. Click FastBuild at the top of the Batch Structure.
 - b. Select the Import Files Ruleset.
 - c. Verify that the Source folder value is set to C:\Datacap\FastBuild\images\Input_SingleTiffs.

- d. Verify that the Copy image folder value is set to C:\Datacap\FastBuild\images\Input_SingleTIFFs.
5. Log out of FastDoc and close the window.
 - a. Click the  admin on the toolbar and select logout.
 - b. Close the FastDoc Window.
6. Configure the test images.

a. Copy all of the content, folders and images from:
C:\DC9-Lab Exercises\FastBuild to C:\Datacap\FastBuild\images

When you complete copying the FastBuild images, the C:\Datacap\FastBuild\images folder should appear as shown in these screen captures.



The Images folder has eight Beneficiary images. The Input_MultiFormat and Input_SingleTIFFs folder each have the same five image files.

End of exercise

Lesson 1.5. Define fingerprints and test rulesets

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.

You are required to configure an application in FastDoc after it is created from a template with the Application Wizard. In this lesson, you learn to configure a fingerprint for a page image.

Activities

- Exercise 1: Add a page fingerprint, on page 1-18
- Exercise 2: Design time testing of rulesets, on page 1-20

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Exercise 1: Add a page fingerprint


Introduction

In this exercise, you select an image for the fingerprint and then the zone for each field that is extracted by using the zonal method. You define the zones for each field by selecting the field in the batch structure and then you use click'n'key to mark the field on the image.

Procedures

Procedure 1, "Add a fingerprint," on page 1-18

Procedure 1: Add a fingerprint

1. Log in to Datacap FastDoc (Admin) in the Datacap Server mode for the FastBuild application, as you did for the previous lesson. User = admin, password = admin.
2. Add Finger Print Class.
 - a. Click the icon for Configuring Documents and Pages. 
 - b. Click the Fingerprints tab.
 - c. Select <New> for the Fingerprint Class.
 - d. Click Add.
 - e. Enter the name Bene_FP_Class.
 - f. Click Add.
 - g. Click Close.
3. Add a Fingerprint.
 - a. Select the Fingerprint class Bene_FP_Class.
 - b. Click Add next to the Fingerprints box.
 - c. Browse to C:\Datacap\FastBuild\images\Input_SingleTIFFs.
 - d. Select bene001.tif and click Open.

The fingerprint is added to the list in the Fingerprints box. The image that you selected displays in the image display. Image enhancement also cleans and straightens the image.

- e. Select the fingerprint: 556 (Other)
 - f. Select the Bene_FP_Class from the Fingerprint Class list.
 - g. Select the Page Type Bene_Page from the Page type list.
4. Drawing Zones.
 - a. To extract the values from the Form, you draw Zones for each of the fields.

You might need to zoom in on the area of the field you are creating a zone for. If you do zoom in you can position the image so that you have a clear view of the field by right-clicking the image and dragging it in a direction to make the field clearly visible.

- b. In the Batch Structure, select the Employee_Name field.
- c. In the Fingerprint Image Pane, consider the width and height of the field and draw a box around the field with the mouse pointer. Observe that the Zone Position / Coordinates are updated.

Note: It might be easier to zoom the image by clicking the magnifier icon. You can move the zoomed image by right-clicking and dragging with your mouse.

- d. Repeat Step 4b and 4c to draw zones for all the fields (of Bene_Page).
-

End of exercise

Exercise 2: Design time testing of rulesets

Introduction

In this exercise, you use the Ruleset Test pane to verify that the fingerprint and rulesets are configured to correctly identify the Bene_Page image and extract the data fields from the image.

Procedures

Procedure 1, "Design Time Testing," on page 1-20

Procedure 2, "Process Batches in Datacap Desktop," on page 1-21

Procedure 1: Design Time Testing

FastDoc provides a test pane where you can test a document to verify that the settings are effective. You can load sample documents, run the process tasks and view the test results all within the design tool.

1. In Datacap FastDoc (Admin), add a file.
 - a. Click the Ruleset Tab.
 - b. Click Add File in the test pane.
 - c. Select the file "bene001.tif" from the C:\Datacap\FastBuild\images\Input_SingleTIFFs folder.
 - d. Click Open. The image displays in the test pane.
2. Test the PageID task.
 - a. Select the PageID in the Profiles and Rulesets pane.
 - b. Click Test.

When it is complete, you see the message "Rule processing is complete with status finished".
 - c. Click OK.
3. Review the test results.
 - a. Page is correctly identified as Bene_Page.
 - b. Document type Bene_Document.

How did it do this?

It matched the fingerprint that you defined earlier.

See the matching fingerprint ID is 556.

Didn't work for you?

Check the fingerprint tab. Make sure Fingerprint 556 is set to Bene_Page type and not the Other type.

4. Test Profiler Task.
 - a. Select the Profiler profile.

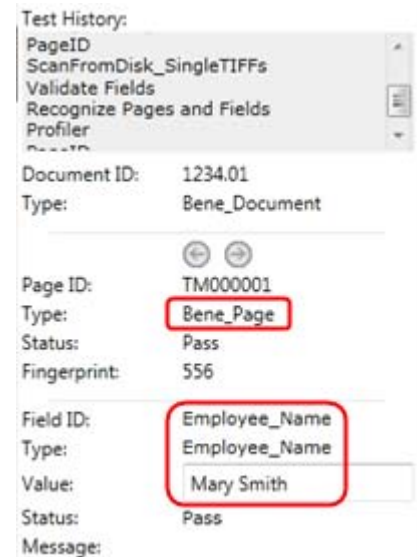
- b. Clear "Routing" ruleset by clicking on it.
 - c. Click Test.
 - d. Click OK for the "Rule processing is complete with status finished" message.
5. Review the Test Results


- a. Select the field Employee_Name in the batch structure and check the results in the test pane.
- b. Select each the fields in the batch hierarchy and test the results.

Didn't work?

Make sure the PageID successfully identified the page as a Bene_Page.

Check your RuleSet tab and make sure that the settings are correct on the Recognize Pages and Fields ruleset for the Bene_Page and each of the fields.



6. Log out of FastDoc and close the window.
 - a. Click the  admin on the toolbar and select logout.
 - b. Close the FastDoc Window.

Procedure 2: Process Batches in Datacap Desktop

1. Log in to Datacap Desktop:
 - a. Double-click the "Datacap Desktop" shortcut on the desktop.
 - b. Login with the following credentials:
 - User: admin
 - Password: admin
 - Station: 1
 - c. Click Start.
 - d. In "Datacap Desktop", if you are prompted with a message "Click OK to run next pending batch", click Stop.
2. Select "FastBuild" from the "Applications" list.
3. Scan a batch.
 - a. Click the VScan shortcut to import files from the import folder.

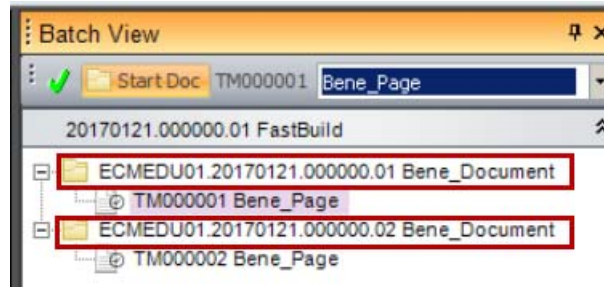
Note: If you are using a physical scanner, the paper would feed through the scanner. FastDoc supports both Twain and ISIS scanners.
 - b. Select "Demo_SingleTIFFs" Job.

The system loads the images from the Import folder into Datacap.
 - c. If you are prompted with a message "Batch <Number> finished with a status of finished", click OK.

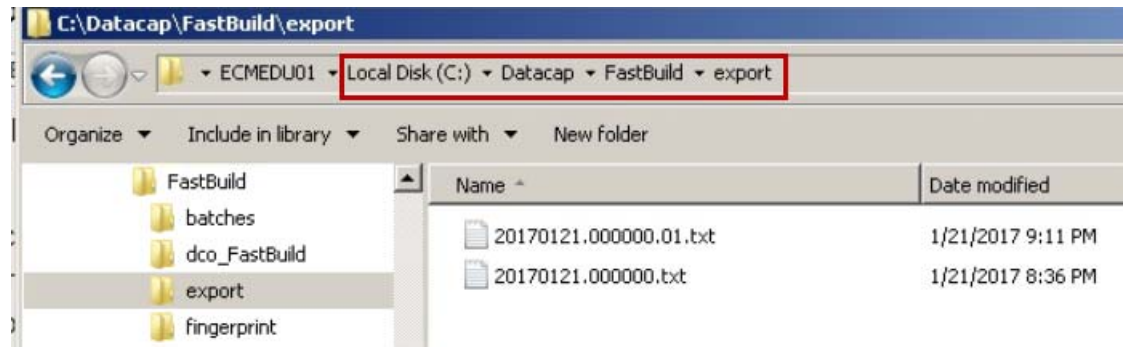
- d. If you are prompted with a message “Click OK to run next pending batch”, click Stop.
4. Identify the Pages.
 - a. Click the PageID shortcut to identify the page types in the batch.
Activities that the PageID task runs are, image enhancement, page identification, document creation, and map pages to documents.
 - b. If you are prompted with a message “Batch <Number> finished with a status of finished”, click OK.
 - c. If you are prompted with a message “Wait 10 sec for a batch to become available”, click Stop.
5. Run the Profiler Task.
 - a. Click the Profiler shortcut.
Activities that the Profiler task runs are, read and populate data, validate data, route pages with validation issues to Verify and error free pages to export.
 - b. If you are prompted with a message “Batch <Number> finished with a status of child spawned”, click OK.
 - c. If you are prompted with a message “Wait 10 sec for a batch to become available”, click Stop.
6. Check the batch items in the Job Monitor.
Pages that are recognized correctly (without low confidence characters, or validation errors) are sent directly to Export instead of Verify. The pages that require verification are sent to Verify step.
 - a. Click the “All” shortcut.
 - b. You see two batch items for your batch:
 - “Verify_Export” job with “Verify” task
 - “Demo_SingleTIFFs” job with “Export” task

Status	Queue ID	Batch ID	Job	Task	Job Start	Job Time	Task Start	Task
	2	20170121.000000.01	Verify_Export	Verify		0	1/21/2017 8:29 PM	0
	1	20170121.000000	Demo_SingleTIFFs	Export	1/21/2017 8:24 PM	49	1/21/2017 8:29 PM	0

7. Run the Verify Task to manually process the low confidence or missing information.
 - a. Double-click your batch item for the “Verify” task in the Job Monitor.
 - b. The verify task page opens.
 - In this exercise, out of five documents, two documents are available for the user to Verify and other three documents are sent to Export.



- c. Click “Next Problem” from the toolbar one or more times to go to the next document.
 - On this page, the low confidence character is displayed with a yellow background.
 - You are viewing the second document that is available for Verify in the batch.
 - d. Click Submit.
 - e. If prompted, click OK to acknowledge the message “The page contains low confidence characters.”
 - f. If prompted, click No for the message “End of batch reached. Continue from start?”
 - g. Click Submit again.
 - h. If prompted, click OK for the message “All Documents are complete. Finish batch?”.
 - i. If you are prompted with a message “Batch <Number> finished with a status of finished”, click OK.
8. Run the Export Task.
- a. Click the Export shortcut.
 - b. If you are prompted with a message “Batch <Number> finished with a status of finished”, click OK.
 - c. Click “Stop” when you are prompted with a message to process the next batch.
 - d. Review the export files in C:\Datacap\FastBuild\export.
 - e. You see that one export file for your current batch is added to the export folder with three records for the documents that bypassed the verify process.
 - Optionally, open the text file and view the text.
 - The export files contain only the metadata that is exported for the documents, which are manually verified.
9. Click the Export shortcut again.
- a. If you are prompted with a message “Batch <Number> finished with a status of finished”, click OK.
 - b. Click “Stop” when you are prompted with a message to process the next batch.
 - c. Review the export files in the C:\Datacap\FastBuild\export folder.
 - d. You see that another export document for your current batch is added to the folder for the manually verified documents with two records.



10. Close the Datacap Desktop window.

End of exercise

Lesson 1.6. Populate fields with keyword lookup

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.

You are required to configure an application in FastDoc after it is created from a template with the Application Wizard. In this lesson, you learn to recognize the field and extract the data with the keyword lookup method rather than the zonal recognition.

Activities

- Exercise 1: Populate fields with keyword lookup, on page 1-26

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Exercise 1: Populate fields with keyword lookup

Introduction


In this exercise, you recognize a field with the keyword lookup method.

Procedures

Procedure 1: Keyword lookup

You configure some fields to search for their location as an alternative to using zonal recognition. You use the keyword locate method to find the Date Signed and some of the fields you already set up. This action locates these fields in a more flexible manner and is especially useful when the layout of the fields is not fixed or is subject to change.

Change Locate Data Method for the Employee Name to use Keywords Search.


1. Log in to Datacap FastDoc (Admin) in the Datacap Server mode for the FastBuild application, as you did for the previous lesson. User = admin, password = admin.
2. Click the Configure workflow icon. 
3. Select “Populate Fields Using Keywords” in the Ruleset list on the rightmost pane.
4. Drag it to the Profiler task so that it is after Recognize Pages and Fields ruleset.
5. Click Save.
6. Disable Zonal Recognition for the Employee_Name field.
 - a. Click the Recognize Pages and Fields ruleset.
The window switches to the Configure documents, pages, and fields view.
 - b. Click the Ruleset tab.
 - c. Select the Employee_Name field in the Batch Structure pane on the left pane.
 - d. Select the “Recognize Pages and Fields” ruleset from the list.
 - e. Clear the Read Field check box and click Save.
7. Configure Locate Using Keywords for the Employee_Name field.
 - a. Select the “Populate Fields Using Keywords” ruleset from the list.
 - b. Select the Employee_Name field.
 - c. Click the Field Information check box so that it is selected.
 - d. Select the “Locate by keyword only” option.
 - e. Click “Add Term” and type “Employee Name” in the Locate Term text box.

This value is the keyword text that the system uses to search the image to locate the field. The system can accept many keywords if necessary.

- f. The “Locate first occurrence” option must be selected. This action tells the system to find the first instance of the keyword on the image. You can also Locate last occurrence.

- g. Click Add Condition > Condition.
 - h. Click Add Locate Movement and select Move down a line from the Direction list.
This action tells the system that the data is immediately below the keyword. You can also search above, left, and right.
 - i. Select Group Leading and Trailing words from the Group direction list.
 - j. Click Save.
8. Add a Date Signed field and configure Locate Using Keywords.
- a. Use your learned skills to add a field (Name: Date_Signed) to the Bene_Page Batch Structure.
Make sure that you select the Bene_Page before adding the new field.
 - b. Select the "Populate Fields Using Keywords" ruleset from the list.
 - c. Make sure the Date_Signed field is selected.
 - d. Click the "Field Information" check box so that it is selected.
 - e. Select the "Locate by keyword only" option.
 - f. Configure the Populate Field Using Keywords ruleset for the Date_Signed field using the following values:
Locate Term: Date Signed
Use" Locate last occurrence"
Direction: Move to next word
Group direction: Group leading words.
 - g. Save your changes.
 - h. Select the PageID profile and click Test.
 - i. Select the Profiler profile, clear Routing, and click Test to verify that the keyword search works properly.
 - j. Click the Date_Signed field in the Batch Structure pane and verify that the Date Signed value is extracted.

Page ID:	TM000001
Type:	Bene_Page
Status:	Fail
Fingerprint:	556
Field ID:	Date_Signed
Type:	Date_Signed
Value:	08-31-2012
Status:	Pass
Message:	

- k. Click the Employee_Name field in the Batch Structure pane and verify that the Employee Name value is extracted.
9. Log out of FastDoc and close the window.
- a. Click the  admin on the toolbar and select logout.

- b. Close the FastDoc Window.
-

End of exercise

Lesson 1.7. Configure validate field rulesets

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.

You are required to configure an application in FastDoc after it is created from a template with the Application Wizard. In this lesson, you learn to configure validation rules to establish the validity of fields that are extracted from the image.

Activities

- Exercise 1: Configure validate field rulesets, on page 1-30

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Exercise 1: Configure validate field rulesets

Introduction

In this lesson, you learn to configure validation rules to establish the validity of fields that are extracted from the image.

Procedures

Add Data Validation to the Document, on page 1-30

Procedure 1: Add Data Validation to the Document

1. Log in to Datacap FastDoc (Admin) in the Datacap Server mode for the FastBuild application, as you did for the previous lesson. User = admin, password = admin.
2. Add Field Validation Rules for the Employee Name field.
 - a. Click the configure Documents, pages, and fields icon in the upper left column.
 - b. Click Bene_Document in the Batch Structure pane.
 - c. Click Bene_Page.
 - d. Click the Employee_Name field.
 - e. Click the Ruleset tab.
 - f. Select the Validate Fields ruleset.
 - g. Click the Validate this field, Employee_Name check box.
 - h. Expand the length options and validate that Minimum is set to 1.
 - i. Click Save to save your edits.
3. Add Field Validation Rules for the Date Signed field.
 - a. Click the Date Signed field.
 - b. Click the Validate this field, Date_Signed check box.
 - c. Clear the Length check box.
 - d. Click the Date check box to select date checking.
 - e. Verify that the Any date option is selected. This selection validates that the field contains a formatted date.
 - f. Repeat steps 3.a.-3.e. for the Date of Birth field.
 - g. Click Save to save your edits.
4. Add Field Validation for the Group Number field.


Make sure that the data in this field starts with a single letter A - H, followed by eight numeric digits.

 - a. Click the Group Number field.
 - b. Click the Validate this field, Group_Number check box.

- c. Expand the Length options block.
- d. Set a Minimum and Maximum length 9.
- e. Click the Value Content check box.
- f. Type this regular expression into the Regular expression match field: `([A-H]{1}[0-9]{8})`

**Hint**

Regular Expression help on Wikipedia http://en.wikipedia.org/wiki/Regular_expression

- g. Correct any errors if the Regular_Expression website flags any.
 - h. Click Save to save your settings.
5. Log out of FastDoc and close the window.
- a. Click the  admin on the toolbar and select logout.
 - b. Close the FastDoc Window.

Procedure 2: Process Batches in Datacap Desktop

1. Log in to Datacap Desktop:
 - a. Double-click the “Datacap Desktop” shortcut on the desktop.
 - b. Login with the following credentials:
 - User: admin
 - Password: admin
 - Station: 1
 - c. Click Start.
 - d. In “Datacap Desktop”, if you are prompted with a message “Click OK to run next pending batch”, click Stop.
2. Select “FastBuild” from the “Applications” list.
3. Scan a batch.
 - a. Click the VScan shortcut to import files from the import folder.

Note: If you are using a physical scanner, the paper would feed through the scanner. FastDoc supports both Twain and ISIS scanners.
 - b. Select "Demo_SingleTIFFs" Job.

The system loads the images from the Import folder into Datacap.
 - c. If you are prompted with a message “Batch <Number> finished with a status of finished”, click OK.
 - d. If you are prompted with a message “Click OK to run next pending batch”, click Stop.

4. Click the PageID shortcut to identify the page types in the batch.
 - a. If you are prompted with a message “Batch <Number> finished with a status of finished”, click OK.
 - b. If you are prompted with a message “Click OK to run next pending batch”, click Stop.
 - c. If you are prompted with a message “Wait 10 sec for a batch to become available”, click Stop.
5. Run the Profiler Task.
 - a. Click the Profiler shortcut.
 - b. If you are prompted with a message “Batch <Number> finished with a status of child spawned”, click OK.
 - c. If you are prompted with a message “Click OK to run next pending batch”, click Stop.
 - d. If you are prompted with a message “Wait 10 sec for a batch to become available”, click Stop.
6. Check the batch items in the Job Monitor.

Like in the previous lesson, pages that are recognized correctly (without low confidence characters, or validation errors) are sent directly to Export instead of Verify. The pages that require verification are sent to Verify step.

 - a. Click the “All” shortcut.
 - b. You see two batch items for your batch:
 - “Verify_Export” job with “Verify” task
 - “Demo_SingleTIFFs” job with “Export” task
7. Run the Verify Task to manually process the low confidence or missing information.
 - a. Double-click your batch item for the “Verify” task in the Job Monitor.
 - b. The verify task page opens.
 - c. Click “Next Edit” from the toolbar.
 - d. If prompted, click Yes to acknowledge the message “No more problem fields. Submit?”
 - e. Click “Next Edit” from the toolbar for the second page.
 - f. If prompted for the second page, click Yes to acknowledge the message “No more problem fields. Submit?”
 - g. Click Submit.
 - h. If prompted, “Validations failed. Override and continue?” click OK.
 - i. If prompted, click OK for the message “All Documents are complete. Finish batch?”.
 - j. If you are prompted with a message “Batch <Number> finished with a status of finished”, click OK.



Troubleshooting

The bene003.tif image has a little out of horizontal alignment, so the Date Signed field is not read correctly.

- a. Select the value from the image with click'n'key.
-
8. Run the Export Task.
 - a. Click the Export shortcut.
 - b. If you are prompted with a message "Batch <Number> finished with a status of finished", click OK.
 - c. Click "Stop" when you are prompted with a message to process the next batch.
 9. Since there are two batch items for export as explained in a previous lesson, click the Export shortcut again.
 - a. If you are prompted with a message "Batch <Number> finished with a status of finished", click OK.
 - b. Click "Stop" when you are prompted with a message to process the next batch.
 10. Close the Datacap Desktop window.
-

End of exercise

Lesson 1.8. Export to IBM FileNet Content Manager

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system.

This lesson describes how to configure the Form rulesets to export to an IBM FileNet Content Manager repository.

Activities

- Exercise 1: Export to IBM FileNet Content Manager, on page 1-35

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Exercise 1: Export to IBM FileNet Content Manager

Introduction

In this activity, you configure the Form rulesets to export to an IBM FileNet P8 repository.

Procedures


Procedure 1, "Configure Export to IBM FileNet," on page 1-35

Procedure 2, "Process a batch," on page 1-37

Procedure 3, "Verify FileNet repository export," on page 1-38

Procedure 1: Configure Export to IBM FileNet

1. Log in to FastDoc (Admin) in the Datacap Server mode.
 - a. Click Datacap Server.
 - b. On the Welcome to Datacap window:

Select Application: FastBuild
Type User: admin
Type Password: admin
Type Station: 1
 - c. Click Login.
2. Add the "Create TIFF or PDF" ruleset to the Export Task.
 - a. Click the Configure Workflow.  icon.
 - b. Make sure that the first Job DemoSingleTIFFs is selected.
 - c. Click the Create TIFF or PDF ruleset from the Rulesets list on the right side of the screen. Drag it to the Export task. Place it before the Export task.
3. Add the "Export to FileNet Content Manager" ruleset.
 - a. Click the Export to FileNet Content Manager ruleset and drag it to the Export task. Place it after the Export ruleset.
 - b. Click Save on the control bar to save your changes.
4. Click the Export to FileNet Content Manager ruleset.

The window changes to the Configure document, page, and field view with the Ruleset tab selected and the Export to FileNet Content Manager ruleset selected.
5. Configure the batch level options for Export to FileNet P8.
 - a. Click the FastBuild batch in the Batched Structure.

- b. Enter the values in the following table.

Field Name	Value
FileNet Content Manager URL	http://ecmedu01:9080/wsi/FNCEWS40MTOM/
User ID	p8admin
Password	IBMFileNetP8
Confirm password	IBMFileNetP8
Storage object id	DCEExport
Parent folder	/Beneficiary Forms/

6. Configure the document level options Export to IBM FileNet P8.
- Click the Bene_Document in the batch structure.
 - Enter the following parameters.
Document Title: @ID
Document class ID: BeneForm
Document file extension: pdf
7. Configure field values to write to IBM FileNet Content Manager repository properties.
- Click Bene_Page in the Batch Structure pane.
 - Click the Employee_Name field in the Batch Structure pane.
 - Click the Field Information check box.
 - Enter the Symbolic Name from the Field Properties table.
 - Repeat step 6.a.- 6.d. for each table entry.

Field Properties Table

Symbolic Name on FileNet P8	Property Type
Employee_Name	String
SSN	String
Date_Of_Birth	Date and Time
Employer	String
Group_Number	String
Home_Phone_Number	String
Home_Address	String
City	String
State	String
ZipCode	String
Date_Signed	Date and Time

8. Configure the “Create TIFF or PDF” ruleset.

If you want the output image to be a PDF file, you must add the convert the image to PDF format. You already added this ruleset at step 2 of this procedure.

- a. Click the FastBuild batch in the Batch Structure pane.
- b. Select the “Create TIFF or PDF” ruleset on the Ruleset tab.
- c. Click “Create PDF Images For Export”.
- d. Click Save on the control bar to save your changes.
- e. Log out and close FastDoc (Admin).

Procedure 2: Process a batch

1. Configure images for scanning.

- a. There might already be images in the C:\Datacap\FastBuild\images\Input_SingleTIFFs folder. Verify and leave only bene001.tif, bene002.tif, and bene004.tif images in the folder. Delete all other images in this folder.
- b. If you don't images in the folder, then copy the following images bene001.tif, bene002.tif, and bene004.tif from C:\Datacap\FastBuild\images to C:\Datacap\FastBuild\images\Input_SingleTIFFs

2. Login in to Datacap Desktop to process the batch.

- a. Double click the Datacap Desktop icon on the desktop.
- b. Log in using:
User: admin
Password: admin
Station: 1
- c. Click Start.
- d. In “Datacap Desktop”, if you are prompted with a message “Click OK to run next pending batch”, click Stop.
- e. Verify and if needed, select the FastBuild application.

3. Scan a batch.

- a. Click the VScan task.
- b. Select Demo_SingleTIFFs.
- c. When prompted with the message processing is complete, click OK.
- d. When prompted for next batch click “Stop”.
- e. Click the All Task Shortcut to display the Monitor view for all active batches. Verify that you have a batch for the Demo_SingleTIFFs job, waiting at the PageID task.

4. Click the Page ID shortcut to run the PageID task.

- a. When prompted with the message processing is complete, click OK.
- b. When prompted for next batch click “Stop”.

5. Click the Profiler shortcut to run the Profiler task.
 - a. When prompted with the message finished with a status of child spawned, click OK.
 - b. When prompted for next batch click "Stop".
 - c. Click the All Task Shortcut to display the Monitor view for all active batches. Verify that your batch for the Demo_SingleTIFFs job is at the Export task.




Note

Images that do not require verification are routed directly to the Export task. If an image require verification by an operator are split off into a new batch with the job name Verify_Export. If the Verify_Export task has to be run for the manual verification on the image, then the export task must be run twice to complete the processing for all of the scanned images.

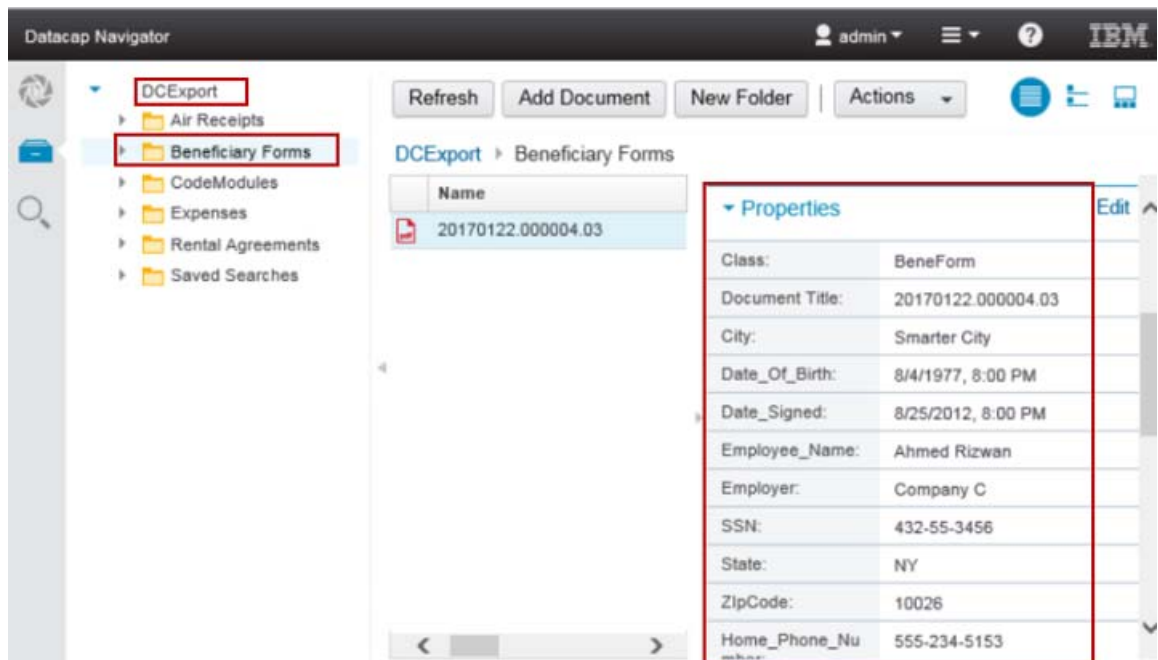
6. Export the batch.
 - a. Double-click your batch for the Demo_SingleTIFFs job that is at the Export task.
 - b. Click OK when you are prompted with the message that the processing is complete.
 - c. If you are prompted for next batch click "Stop".
 - d. Close the Datacap Desktop window.

Procedure 3: Verify FileNet repository export

1. Verify the FileNet repository output.
 - a. In the Internet Explorer browser, click the DCN - Datacap bookmark on the bookmark bar.
 - b. Log in using admin/admin.
 - c. Click the Open Browse View icon  in the left side toolbar.
 - d. Log in using p8admin/IBMFileNetP8.
 - e. Click the "Beneficiary Forms" folder and verify that documents are listed.
 - f. Select (single-click) one of the Beneficiary Forms documents in the list and verify that the field name in the following table are listed in the "Properties" pane on the right.

Field name	Field name
Employee_Name	City
SSN	State
Date_Of_Birth	ZipCode
Home_Phone_Number	Employer
Home_Address	Group_Number

- g. Verify that the document icon in the IBM FileNet Content Manager repository is a PDF icon.



- h. Expand the “System Properties” in the Properties pane on the right.
- i. Notice that the MIME type is application/pdf.
2. Log out of the Datacap Navigator in Internet Explorer and close the window.



Troubleshooting

If you double-click the document, it opens the document in the Viewer. If an error shows up for the Java update, click “Later”. Close the viewer to go back to the main page to see the properties.

End of exercise

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, Visual Studio, installed.

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

Start student system components

Procedures

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

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

Procedure 1: Start student system components

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

2. Start the WebSphere hosted system components.

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

Start the WebSphere components by running the start script.

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

The start process can take several minutes.

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




Information

The following components are hosted on WebSphere Server1:

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

Procedure 2: Start Datacap Server

1. Click `Start > All Programs > IBM Datacap Service > Datacap Server Manager`.
The Taskmaster Server Manager window is shown.
2. Click the `Service` tab.

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

Check the WebSphere Application Server

Procedures

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

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

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

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

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

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

Procedure 1: Check the WebSphere Application Server

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

Procedure 2: Check the Content Engine

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

Log in using User = p8admin Password = IBMFileNetP8

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

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

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

Procedure 3: Check the Process Engine

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

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

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

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

Procedure 4: Check the Administration Console

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

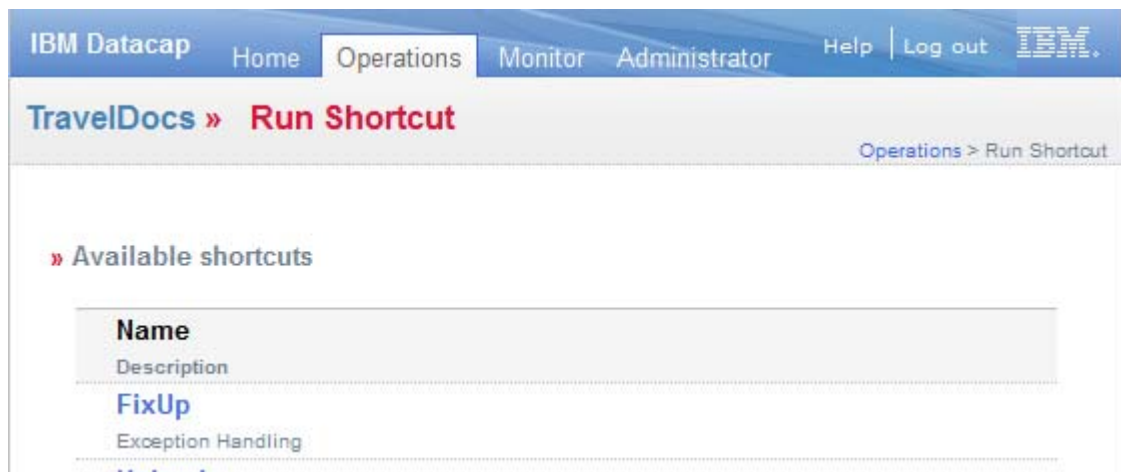
Procedure 5: Check the IBM Navigator

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

Procedure 6: Check the Datacap Components

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

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



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

Restart the student system

Procedures

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

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

Procedure 1: Restart the student system (if needed)


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

1. Stop the WebSphere hosted system components.

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

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

2. Stop the Datacap Server service.

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

3. Restart the windows server.

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



Important

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

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

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

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

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

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

Configure Datacap Rulerunner for TravelDocs

Procedures

Procedure 1: Stop and Connect

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

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

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

Procedure 2: Configure TravelDoc tasks

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

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



Note

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

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

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

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

Enable Datacap Rulerunner logging

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

Start the Datacap Rulerunner Manager Service

Procedure 1: Start the Rulerunner service

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



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