

Course Guide

IBM Datacap 9.0.1: Datacap Navigator Configuration

Course code F257 ERC 1.0



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Course description

IBM Datacap 9.0.1: Datacap Navigator Configuration

Duration: 8 hours

Overview

This course shows you how to install and configure Datacap Navigator. Topics: User Settings, Rescan, Single Sign On, Custom Panels, External Data Services (EDS), Transactional Capture, Customization.

You work with a fully functioning IBM FileNet Content Manager system configured with IBM Content Navigator and IBM Datacap for students to practice the skills that are required to implement and configure data capture solutions.

Audience

- Administrators who are responsible for configuring and administering Datacap system
- Anyone who needs to know the Datacap system administration

Prerequisites

The following courses or equivalent knowledge are required:

- IBM Datacap 9.0.1: Introduction (F251)
- Optional: IBM Datacap 9.0.1: Configuration (F256)

Skills taught

Upon completion of this course, participants will be able to:

- Change the User Settings
- Enable Datacap Navigator Single Sign On
- Configure Users and Groups
- Enable Rescan for the Verify task
- Create a custom Panel for a task
- Implement External Datacap Services for Datacap Navigator
- Configure Transactional Capture
- Install Datacap Navigator as a plug-in
- Customize the Datacap Navigator desktops

Course Topics

Refer to the “Contents” section (TOC) for course content.

Curriculum relationship

Prerequisite for this course

- F251 IBM Datacap 9.0.1: Introduction

For anyone involved in Datacap Configuration, Maintenance, or Administration, the following classes should be taken as a set.

- F256 IBM Datacap 9.0.1: Configuration
- F257 IBM Datacap 9.0.1: Datacap Navigator Configuration
- F258 IBM Datacap 9.0.1: Administration

Agenda

**Note**

The following lesson durations are estimates, and might not reflect every class experience.

Day 1

Unit 1. Datacap Navigator Configuration

- (00:30) Lesson 1 - Navigator Updates
- (01:00) Lesson 2 - Change Datacap Navigator User Settings
- (00:30) Lesson 3 - Configure Datacap Users and Groups
- (01:00) Lesson 4 - Enable Rescan for the Verify task
- (01:00) Lesson 5 - Create Custom Panels
- (01:00) Lesson 6 - Implement External Data Services
- (01:30) Lesson 7 - Transactional Capture

Day 2

Unit 2. Datacap Navigator Configuration

- (01:30) Lesson 8 - Install and Customize Datacap Navigator

Unit 1. Datacap Navigator Configuration

What this unit is about

In this unit, you learn how to install Datacap navigator plugin and configure Datacap Navigator.

What you should be able to do

- Navigator Updates
- Change Datacap Navigator User Settings
- Create users and groups
- Enable Rescan for the Verify task
- Create a custom panel for a task
- Implement external data services for Datacap Navigator
- Transactional Capture
- Install Datacap Navigator as a plug-in
- Customize the Datacap Navigator desktops

How you will check your progress

- Successfully complete the activities in the Student Workbook.

References

- Installing and configuring Datacap Navigator
https://www.ibm.com/support/knowledgecenter/SSZRWW_9.0.1/com.ibm.dc.install.doc/dcnvi001.htm
- Administering Datacap Navigator
https://www.ibm.com/support/knowledgecenter/SSZRWW_9.0.1/com.ibm.dc.admin.doc/dcnav000.htm

Unit Objectives

- Enable Datacap Navigator Single Sign On
- Change Datacap Navigator User Settings
- Create users and groups
- Enable Rescan for the Verify task
- Create a custom panel for a task
- Implement external data services for Datacap Navigator
- Transactional Capture
- Install Datacap Navigator as a plug-in
- Customize the Datacap Navigator desktops

Datacap Navigator Configuration

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Figure 1-1. Unit Objectives

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Notes:

Lesson 1.1. Navigator Updates

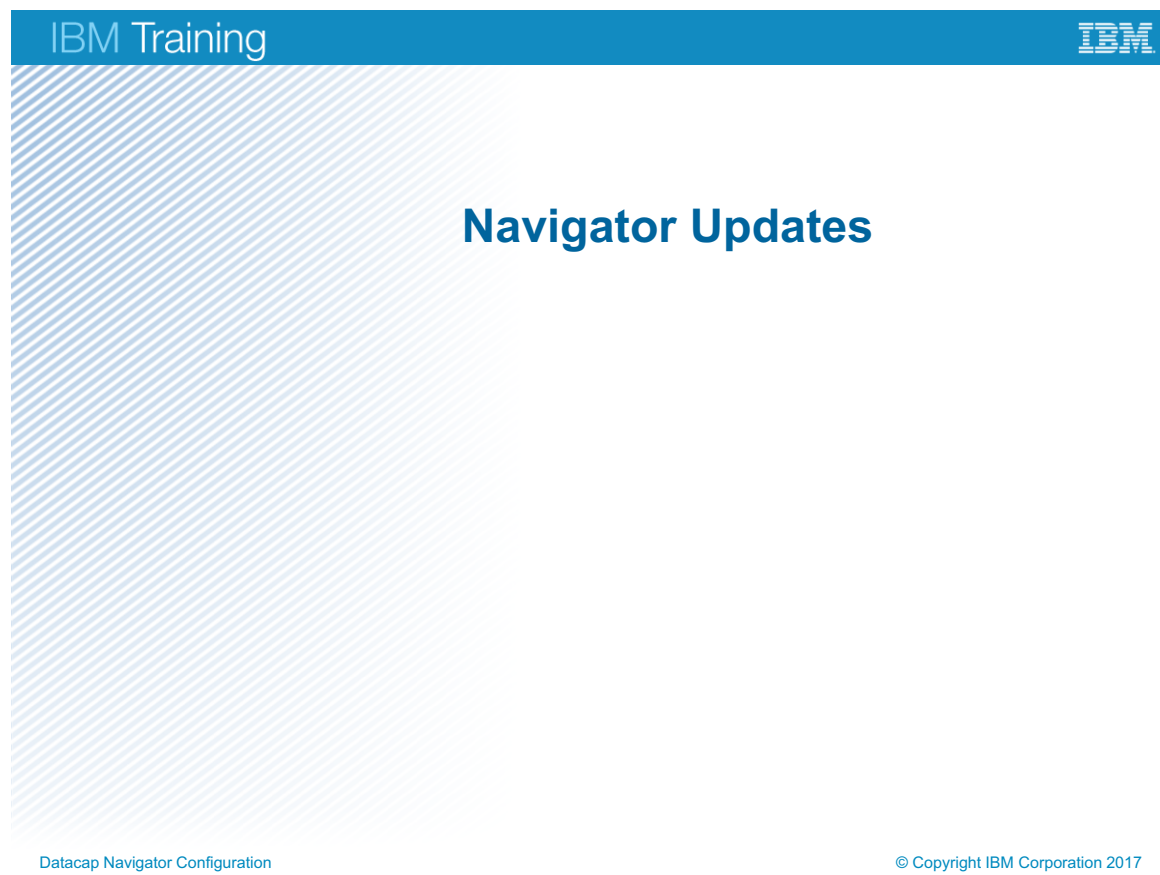


Figure 1-2. Navigator Updates

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Notes:

Topics

- ▶ Navigator Updates
 - Change Datacap Navigator User Settings
 - Configure Users and Groups
 - Enable Rescan for the Verify task
 - Create Custom Panels
 - Implement External Data Services
 - Transactional Capture
 - Install and Customize Datacap Navigator

Datacap Navigator Configuration

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Figure 1-3. Topics

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Notes:

Why is this lesson important to you?

- This lesson provides an overview of the updates to IBM Datacap Navigator 9.0.1.

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Figure 1-4. Why is this lesson important to you?

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Notes:

Datacap Navigator 9.0.1 Update topics

- Access Datacap Navigator Single Sign On enabled (SSO)
- Configure scan without ActiveX
- Configure image viewing with Daeja ViewOne
- Run an APT application in Datacap Navigator
- Transactional Capture in IBM Content Navigator
- Customize Job Monitor and control fields in verification via EDS
- Datacap Desktop and TMWeb operations in Datacap Navigator

Datacap Navigator Configuration

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Figure 1-5. Datacap Navigator 9.0.1 Update topics

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Notes:

Single Sign On (SSO)

- SSO is only supported for IBM WebSphere Application Server.
- Two Types of SSO are supported.
 - (SSO) between ICN repositories with container-manager authentication.
 - ISAM SSO with IBM Security Access Manager

Access Datacap Navigator Single Sign On enabled (SSO)

- Configure for container-managed authentication:
 1. WebSphere Configurationsystem
 2. Configure TMS with LLDAP authentication typesystem
 3. Enable SSO for Datacap repositorysystem
- Configuration for IBM Security Access Manager:
 1. Install IBM Content Navigator with ISAM SSO enabledsystem
 2. Configure TMS with LLDAP authentication typesystem
 3. Enable SSO for Datacap repositorysystem

Datacap Navigator Configuration

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Figure 1-6. Access Datacap Navigator Single Sign On enabled (SSO)

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Notes:

Help Path:

- **Configuring single sign-on (SSO) for Datacap Navigator**

http://www.ibm.com/support/knowledgecenter/SSZRWW_9.0.1/com.ibm.dc.install.doc/dcaen446.htm?lang=en

- **IBM Security Access Manager for Web on WebSphere Application Server (FileNet P8)**

<http://www.ibm.com/support/docview.wss?uid=swg27042202>

WebSphere Configuration

Configuring SSL for IBM Content Manager Enable SSL on the application server for each instance of IBM® Content Navigator to access the Datacap repositories.

Steps to configure SSL for Box

1. Log into the WebSphere Application Server Admin console where IBM Content Navigator is deployed.

2. Go to the appropriate **Signer certificates** control option.
 - a. For cluster configuration, navigate to **Security > SSL certificate and Key management > Key stores and certificates > CellDefaultTrustStore > Signer certificates**.
 - b. For stand-alone configuration, navigate to **Security > SSL certificate and Key management > Key stores and certificates > NodeDefaultTrustStore > Signer certificates**.
3. Click **Retrieve from port**.
4. Specify the Box host name URL. For example, in the **Host** field, enter ecmdev.app.box.com, and in the **Port** field, enter 443.
5. Provide an alias name. For example, boxecm.
6. Click **Retrieve signer information**.
7. Save the certificate and save your changes.
8. Re-start all instances of the IBM Content Navigator server.

If your version of WebSphere is not up to date with the POODLE vulnerability fix, also complete the following steps:

1. Go to **Servers > Server Types > WebSphere application servers**.
2. For each IBM Content Navigator server, click the *server name* > **Java and Process Management > Process definition > Java Virtual Machine**.
3. For **generic JVM arguments**, add the argument -Dhttps.protocols=TLSv1,TLSv1.1,TLSv1.2.
4. Save your changes.
5. Re-start all instances of the IBM Content Navigator server.

Configure TMS with LLDAP authentication type

1. Open Datacap Server Manager.
2. Select the Service tab and click stop.
3. Select Datacap tab and select LLDAP for Authentication system.
4. The Authentication path template should be set to:
`ecmedu01:389/BindUser:cn=P8Admin,o=sample?BindPw:IBMFileNetP8?UserBaseDn:o=sample?UserSearchFilter:(&(objectClass=person)(cn=<%user%>))?UserShortNameAttr:cn?UserDisplayNameAttr:sn?GroupBaseDn:o=sample?GroupSearchFilter:(&(objectClass=groupOfNames))?GroupShortNameAttr:cn?GroupDisplayNameAttr:cn?GroupMembershipSearchFilter:(&(objectClass=groupOfNames)(member=<%user%>))`
5. Click **Save**
6. Click the **Service** tab and Click **Start**

Enable SSO for Datacap repository.

1. Open the Firefox browser.
2. Click the ICN Admin bookmark and log in as p8admin/IBMFileNetP8
3. Click Repositories in the navigation pane.

4. Double-click TravelDocs.
5. Edit a field on the General tab. For example: retype the Display name: TravelDocs.
6. Click connect and log in as susan/class
7. Click the configuration Parameters tab.
8. Click the Single sign-on: Enable option.
9. Click Save and Close.
10. Log out and close the Firefox window.

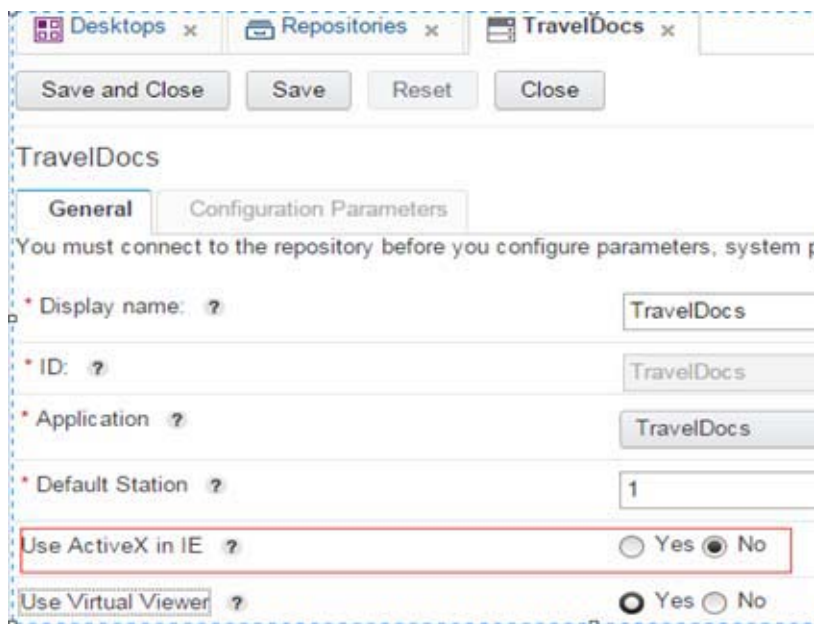
Install IBM Content Navigator with ISAM SSO enabled

To use this option, the ISAM module must be included when IBM Content navigator is installed.

Get additional details from this link: <http://www.ibm.com/support/docview.wss?uid=swg27042202>

Scan without ActiveX

- Disable ActiveX in the ICN Admin desktop



Datacap Navigator Configuration

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Figure 1-7. Scan without ActiveX

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Notes:

Web TWAIN scanning configuration

You can specify whether to use ActiveX or Web TWAIN for scanning and document import in Internet Explorer. Specify ActiveX or Web TWAIN for Internet Explorer in the Repositories area of the IBM Content Navigator administration client.

- ActiveX is no longer required.
- The Web TWAIN service can drive scanners and import files from the local file system.
- Users do not need to install and enable ActiveX on their client machines.
- Users are automatically prompted to install Web TWAIN the first time they try to scan.
- Navigator supports Web TWAIN for scanning on Internet Explorer, Firefox, and Chrome.
- ActiveX is only available on Internet Explorer and ActiveX is the default for IE.
- Administrators can enable Web TWAIN service in IE on the repository level in the ICN admin tool.
- The Web TWAIN service must be installed on the client machine as a Windows service.

- ActiveX provides better performance. IE only.
- TWAIN provides better security.

View images Daeja ViewOne

- Enable Daeja ViewOne on the ICN Admin

The screenshot shows the 'TravelDocs' configuration window in the IBM Datacap Navigator. The 'General' tab is active. The 'Use Virtual Viewer' option is highlighted with a red box and is set to 'No'. Other fields include 'Display name', 'ID', 'Datacap wTM URI', 'Application', and 'Default Station'.

Datacap Navigator Configuration

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Figure 1-8. View images Daeja ViewOne

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Notes:

IBM Daeja™ ViewONE Virtual document viewer

You can view documents with IBM Daeja ViewONE Virtual, a server-based viewer that does not require Java on the client. Support for IBM Daeja ViewONE Professional is maintained. Specify which document viewer to use for a Datacap application in the Repositories area of the IBM Content Navigator administration client.

With Daeja ViewOne Java is not required in the browser.

- Administrator can enable virtual viewer on the repository level in the ICN admin tool.
- Available in IE, Firefox, and Chrome
 - Chrome 45+ does not support Java.
- Known limitations (work in progress, should be available by Q2, 2016)
 - “Zoom Area” and “Zoom Quarter” actions
 - Click-and-key with single click
 - Show/hide thumbnails via double-click

Run an APT application in Datacap Navigator

- Line item grid data is available in verification
 - Support large volume of lines: 2K lines can be loaded within seconds
 - Shown as a grid on Desktop
 - Find Details and Calculate Blank actions are available
 - Users can insert/append new lines
 - Users can delete one or more items at a time
- Purchase Order Line Reconciliation POLR
 - Matches the line items from invoices to line items in purchase orders
 - Filter supported
- Sticky Fingerprint is available in verification.
 - Process multiple unknown invoices for a known vendor in a single batch.

Datacap Navigator Configuration

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Figure 1-9. Run an APT application in Datacap Navigator

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Notes:

Sticky Fingerprint is available in verification to process multiple unknown invoices for a known vendor in a single batch.

1. Lookup Vendor.
2. Populate the data fields by using click-and-key and Find Details.
3. Validate current page data to ensure that the invoice data passes all validations.
4. When moving to the next invoice in the batch for the same vendor, Sticky button is available. Click to locate and populate the fields automatically.

Transactional Capture in IBM Content Navigator

There are three default functions:

- Add a local document.
 - Scan an image save it directly to a repository. Optionally, manually provide metadata allowed by the Document Class that is selected.
- Add document information
 - Manually provide metadata allowed by the Document Class that is selected. (No image is saved)
- Link to an external document
 - Provide a hyperlink to an external. Document. Optionally, manually provide metadata allowed by the Document Class that is selected.

Note: There is a complete lesson on the Transactional Capture topic later in this unit.

Datacap Navigator Configuration

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Figure 1-10. Transactional Capture in IBM Content Navigator

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Notes:

Help path:

<http://www.ibm.com/support/docview.wss?uid=swg27046892>

Enhancements to Datacap Navigator

Transactional Capture enhancements

- Files in formats other than TIFF can be imported.
- Automatic data capture populates the field entry panel with field data from scanned documents.
- Repository files can be Added to a Batch.

Other 9.0.1 Datacap Navigator Enhancements

- These enhancements fall into four categories:
 - Scan
 - Verification
 - Batch Structure
 - Task Layout Setting

Note: These enhancements topics are covered in the Datacap Navigator Configuration class.

Notes:

This list of enhancements document some of the changes that you will observe as you use the Datacap navigator interface.

- Rescan in verify and classify
- Multiple file selection in browse dialog
- More file formats supported when importing
- Insert, Append, and Replace in Scan page
- Multi-pass Verification
- More Variables Supported
 - Runtime Fields Support
- Show Field and Page Error Messages
- Image Rotation
- Undo Action

- Enable/Disable Actions Individually
- Toolbar Layout Changes
- Add a Comment to a Page
- Variable Column Configuration
- Multiple Selection Support
- Task Layout settings

EDS Enhancements

- Customize views with External Data Services:
- Job Monitor Customization via EDS
 - Change cell values, styles, column names, and enable cells to show Dojo widgets:
- More EDS properties supported in verification:
 - customValidationError: Description of an invalid reason.
 - hidden: true or false to determine whether to show this field.
 - displayMode: “readonly” or “readwrite” to determine whether to be read-only.

Notes:

Help path:

IBM Datacap 9.0.1>Administering your system>Datacap web clients administration>Administering Datacap Navigator>Customizing Job Monitor

http://www.ibm.com/support/knowledgecenter/SSZRWW_9.0.1/com.ibm.dc.admin.doc/dcnv006.htm

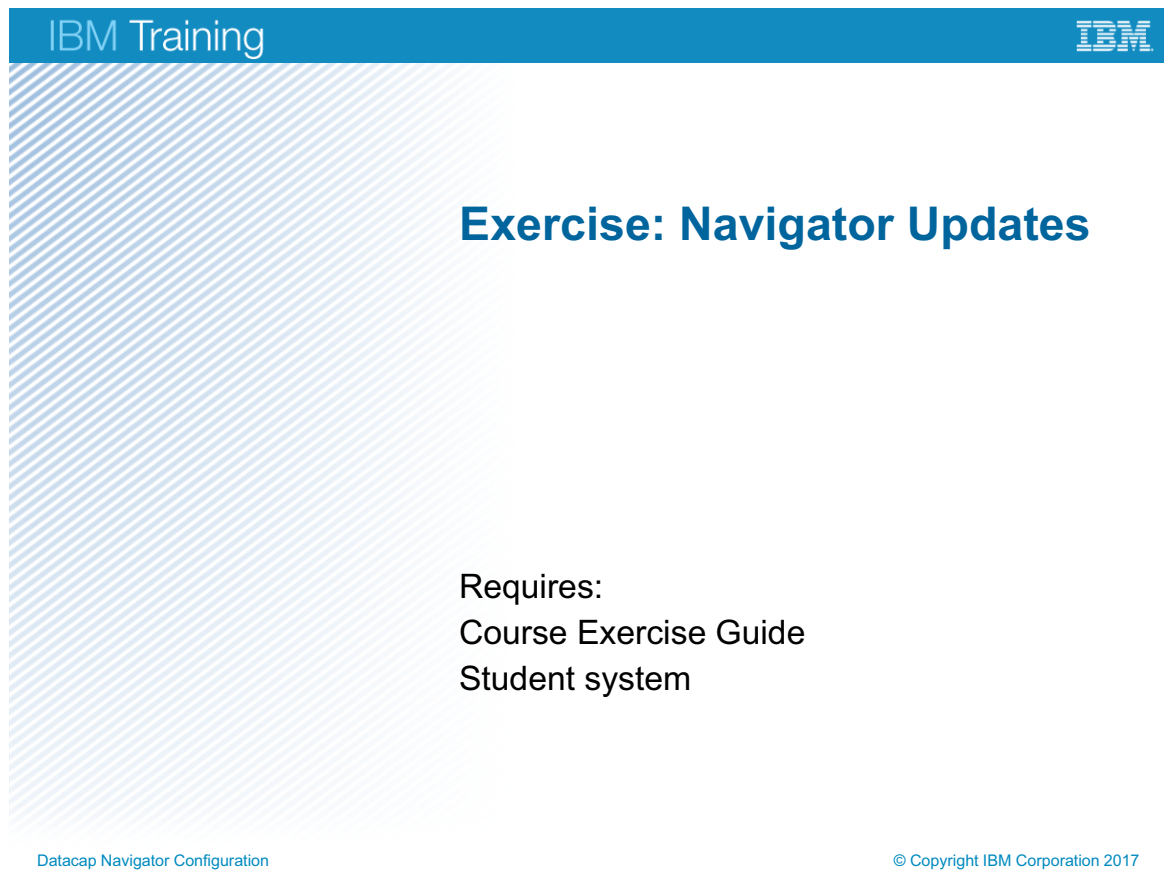


Figure 1-13. Exercise: Navigator Updates

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Notes:

Exercise objectives

- Enable Datacap Navigator Single Sign On (SSO)



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Figure 1-14. Exercise objectives

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Notes:

Lesson 1.2. Change Datacap Navigator User Settings

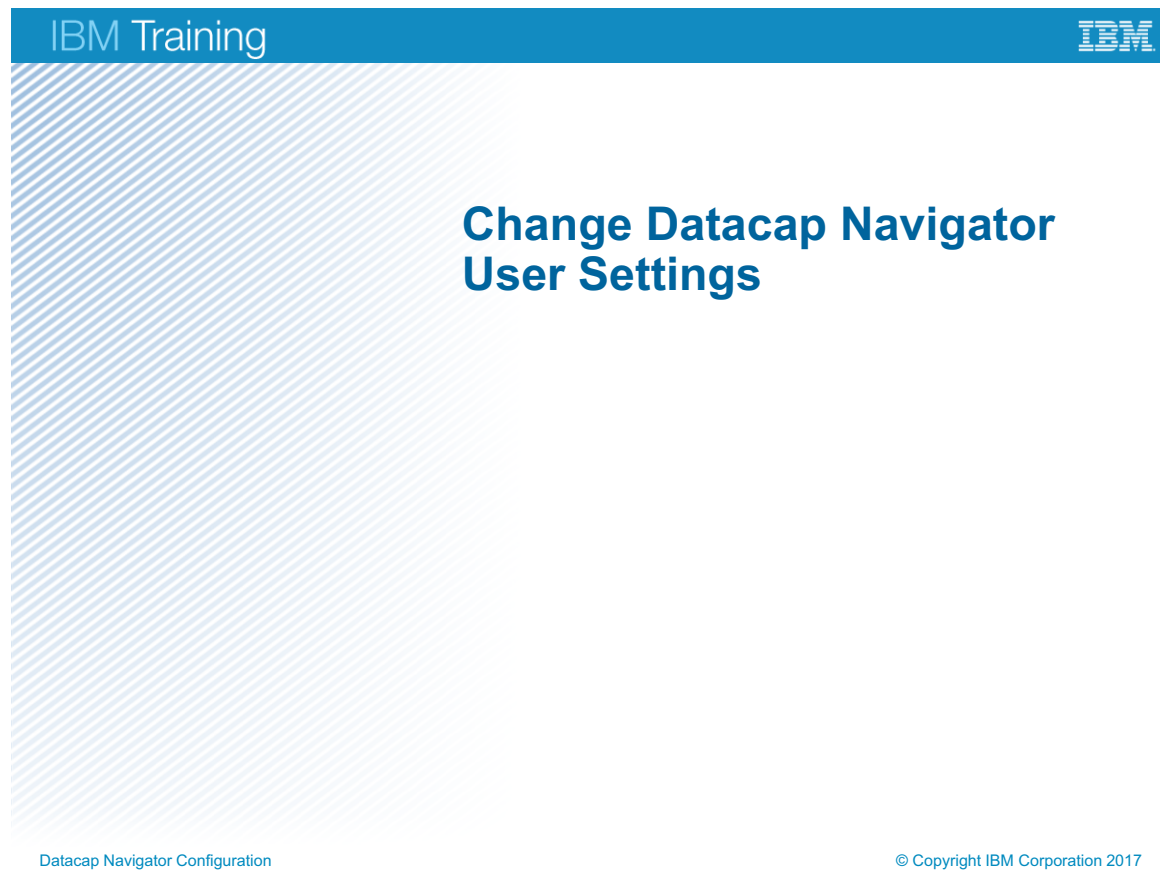


Figure 1-15. Change Datacap Navigator User Settings

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Notes:

Topics

- Navigator Updates
- ▶ Change Datacap Navigator User Settings
 - Configure Users and Groups
 - Enable Rescan for the Verify task
 - Create Custom Panels
 - Implement External Data Services
 - Transactional Capture
- Install and Customize Datacap Navigator

Datacap Navigator Configuration

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Figure 1-16. Topics

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Notes:

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.

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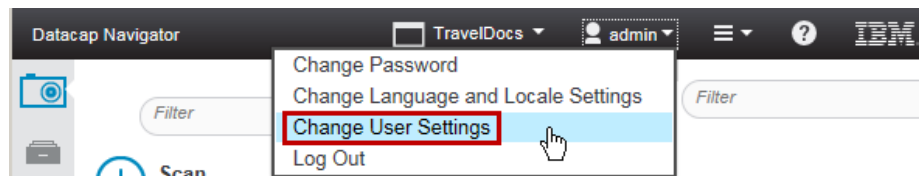
Figure 1-17. Why is this lesson important to you?

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Notes:

Datacap Navigator User Settings

- In User Settings, each user can change the following items:
 - Tailor the experience to meet the individual needs.
 - Change the appearance and operation of the user interface.
- Start the User Settings from the Datacap Navigator banner.
 - Click the User ID, and select the User Settings from the list.



Datacap Navigator Configuration

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Figure 1-18. Datacap Navigator User Settings

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Notes:

Datacap Navigator User Settings – Global tab

- Changes in the Global tab affect the entire Datacap Navigator client:

- Show or Hide the title bar
- Show or Hide the Shortcuts pane when you start a task

The screenshot shows the 'Settings' window with the 'Global' tab selected. The 'Global' tab is highlighted with a red box. Below the tabs, there are two unchecked checkboxes: 'Hide the title bar in all widgets' and 'Hide the Shortcuts pane when you start a task'. There is a checked checkbox for 'Specify field values by using data type controllers ?'. Under the 'Viewer settings' section, 'Display thumbnails:' is set to 'Do not display'. Under the 'Configure station IDs for applications' section, there is a text input field for 'Station ID for TravelDocs' containing the value '1'. Blue arrows point from the text instructions to these specific settings.

- Show or Hide thumbnails for preview and specify its location
- Set the Station ID for the application.

Datacap Navigator Configuration

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Figure 1-19. Datacap Navigator User Settings – Global tab

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Notes:

The screen capture shows the options available in the “Global” tab of the Settings page.

User Settings – Scan tab - General

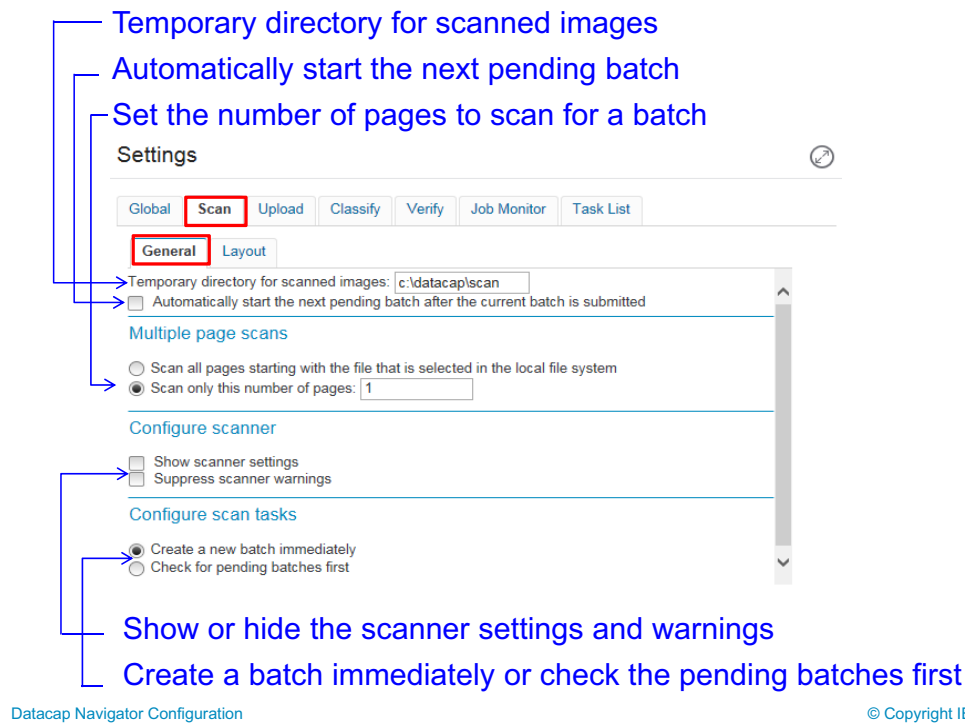


Figure 1-20. User Settings – Scan tab - General

F2571.0

Notes:

The screen capture shows the options available in the “Scan” tab > “General” subtab of the Settings page.

User Settings – Scan tab – Layout

- Change the layout of the widgets for the Scan page.
 - Start Panel
 - Image Viewer
 - Batch Structure
- Select the option whether to apply to one task or all Scan tasks.
- Drag the widgets to move them.

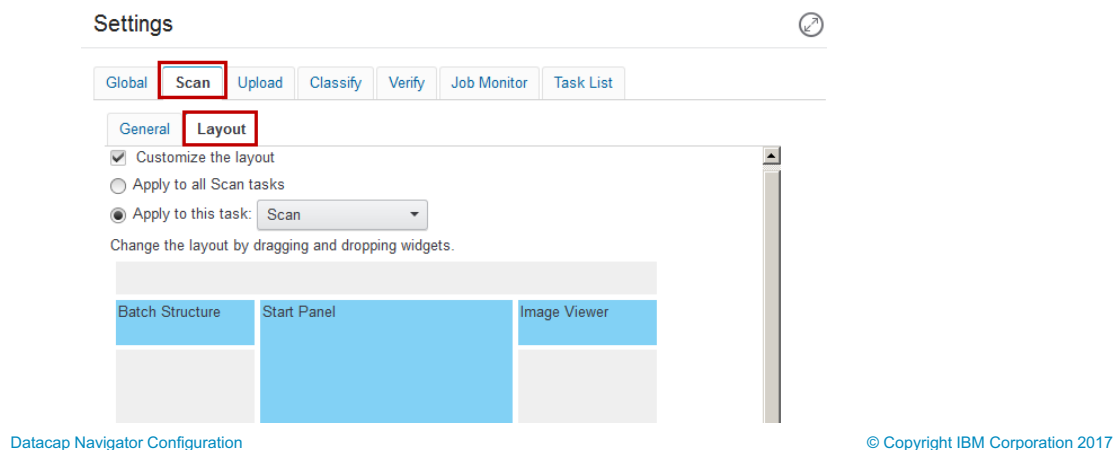


Figure 1-21. User Settings – Scan tab – Layout

F2571.0

Notes:

Help path:

IBM Datacap 9.0.1>Administering your system>Datacap web clients administration>Administering Datacap Navigator>Setting Datacap Navigator default page layouts

http://www.ibm.com/support/knowledgecenter/SSZRWW_9.0.1/com.ibm.dc.admin.doc/dcnv005.htm

The screen capture shows the options available in the “Scan” tab > “Layout” subtab of the Settings page.

The Classify and Verify pages contain widgets such as the image viewer, start panel, field details, and batch structure.

Datacap Navigator users can override the default layout by changing the user settings.

1. From any Datacap Navigator view, click the user ID drop-down menu and select Change User Settings.
2. On the Settings window, click the Classify, Verify, or Scan tab. Then, click the Layout tab and rearrange the widgets.

User Settings – Upload and Classify tab

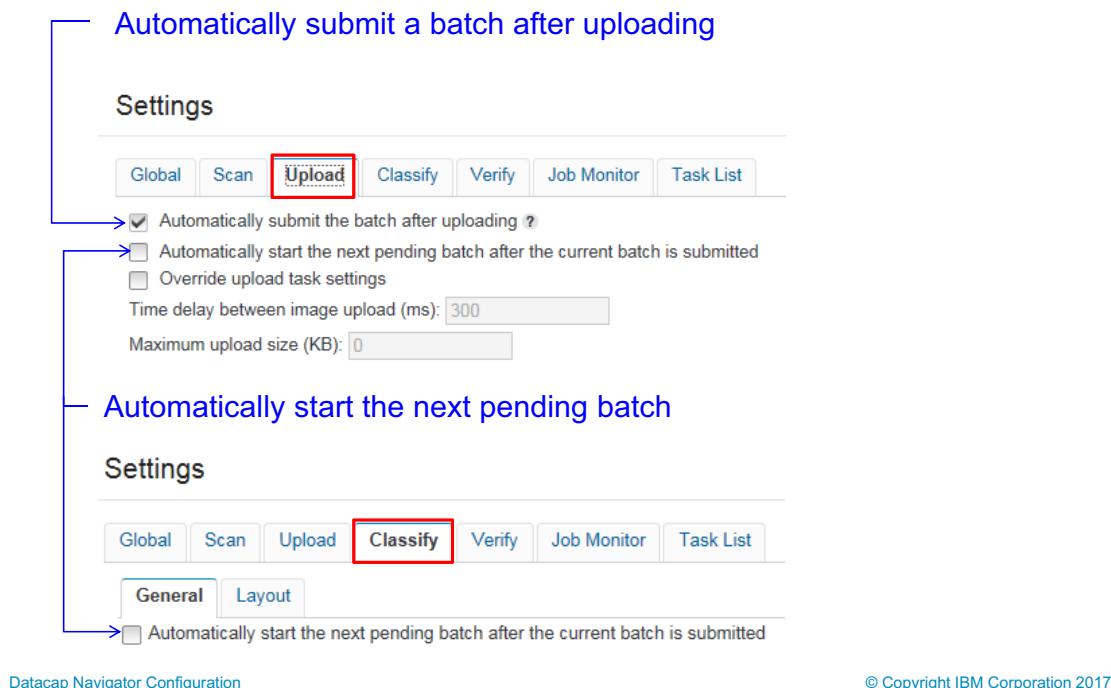


Figure 1-22. User Settings – Upload and Classify tab

F2571.0

Notes:

The screen capture shows the options available in the “Upload” and “Classify” tabs of the Settings page.

Other options in the “Upload” tab of the User Settings:

- Override the Upload task setting with the following user settings:
 - Time delay between image upload
 - Maximum upload size

Options in the “Classify” tab > Layout subtab of the User Settings:

- Change the layout by dragging the following widgets to place them:
 - Image Viewer
 - Batch Structure

User Settings – Verify tab

- The “Verify” tab has General and Layout subtabs.

Settings

Global Scan Upload Classify **Verify** Job Monitor Task List

General Layout

☐ Show snippet

☐ Show only fields that have errors

☐ Automatically override a validation failure

☐ Automatically submit a page when there are no more problems

☐ Automatically start the next pending batch after the current batch is submitted

Number of pages to load:

1

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Figure 1-23. User Settings – Verify tab

F2571.0

Notes:

The screen capture shows the options available in the “Verify” tab of the Settings page.

Options in the “Verify” tab > General subtab of the User Settings:

- Show or hide the image snippet above the field value
- Show only fields that have errors
- Automatically override a validation failure
- Automatically submit a page when there are no more problems.
- Automatically start the next pending batch after the current batch is submitted.
- Set the number of pages to load.

Options in the “Verify” tab > Layout subtab of the User Settings:

- Change the layout by dragging the following widgets to place them:
Field Details, Image Viewer, and Batch Structure

User Settings – Job Monitor tab

- Specify which Job attributes to show in Job Monitor and their order.

Settings

Global Scan Upload Classify Verify **Job Monitor** Task List

Specify which columns and their order to show on the page.

Name contains

Add or Remove

Available Columns		Selected Columns	
Task		Queue ID	
Task Start		Batch	
Job Stop		Job	
Batch Directory	→	Status	↑
Page File	←	Job Start	↓
Operator Skip		Job Time	
Station Skip		Operator	
Priority		Station	
Documents		Pages	

Number of jobs to retrieve from the server at one time: 200

Refresh interval (in seconds): 0

Default display of the job information pane: Expand when item is selected

Restore Defaults

← **Rearrange the order**

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Figure 1-24. User Settings – Job Monitor tab

F2571.0

Notes:

The screen capture shows the options in the “Job Monitor” tab of the User Settings:

- Specify which Job attributes to show in Job Monitor page of the Datacap Navigator.
 - Use the arrows to add or remove the Job attributes from the “Selected Columns”.
- Arrange the order of the Job attributes to show in Job Monitor page.
 - Use the up and down arrows to change the order in the “Selected Columns”.
- Enter the number of Jobs to retrieve from the server at one time.
- Set the Refresh interval in seconds.
- Expand the Job information pane when item is selected.

User Settings – Task List tab

- Specify which Job attributes to show in Task List and their order.

Settings

Global Scan Upload Classify Verify Job Monitor **Task List**

Specify which columns and their order to show on the page.

Name contains

Available Columns

- Task Start
- Job Stop
- Batch Directory
- Page File
- Operator Skip
- Station Skip
- Priority

Selected Columns

- Queue ID
- Batch
- Job
- Task
- Status
- Job Start
- Job Time
- Operator
- Station

Number of jobs to retrieve from the server at one time: 200

Refresh interval (in seconds): 0

Default display of the job information pane: Expand when item is selected

Restore Defaults

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Figure 1-25. User Settings – Task List tab

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Notes:

The screen capture shows the options in the “Task List” tab of the User Settings:

- Specify which Job attributes to show in Task List.
 - Use the arrows to add or remove the Job attributes from the “Selected Columns”.
- Arrange the order of the Job attributes to show in Task List.
 - Use the up and down arrows to change the order in the “Selected Columns”.
- Enter the number of Jobs to retrieve from the server at one time.
- Set the Refresh interval in seconds.
- Expand the Job information pane when item is selected.

Demonstrations

- Set options for the Scan task in User Settings

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Figure 1-26. Demonstrations

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Notes:

If you are taking this course as a self-paced virtual course, return to the main course menu to play the pre-recorded demonstrations.

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Exercise: Change the User Settings

Requires:

- Course Exercise Guide
- Student system

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Figure 1-27. Exercise: Change the User Settings

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Notes:

Exercise objectives

- Change the User Settings



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Figure 1-28. Exercise objectives

F2571.0

Notes:

Lesson 1.3. Configure Users and Groups

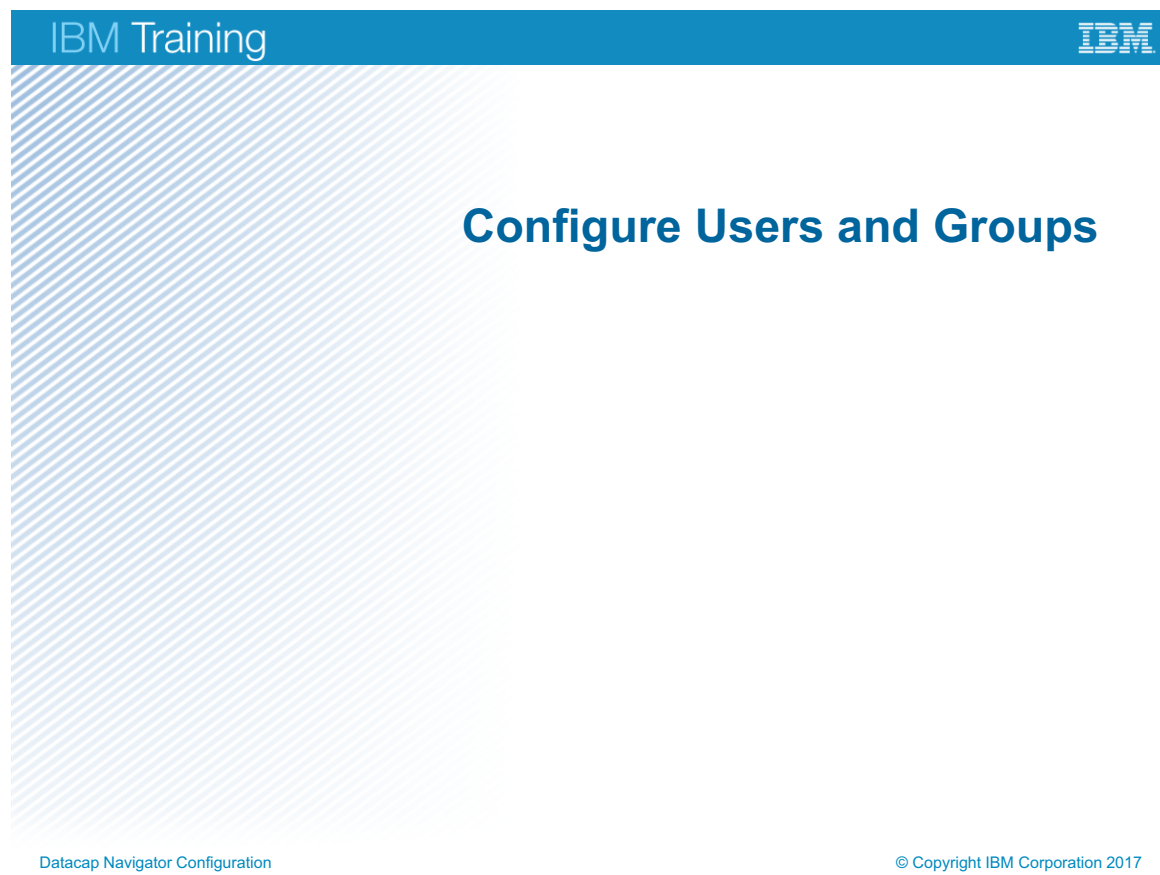


Figure 1-29. Configure Users and Groups

F2571.0

Notes:

Topics

- Navigator Updates
- Change Datacap Navigator User Settings
- ▶ Configure Users and Groups
 - Enable Rescan for the Verify task
 - Create Custom Panels
 - Implement External Data Services
 - Transactional Capture
- Install and Customize Datacap Navigator

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Figure 1-30. Topics

F2571.0

Notes:

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. You also create a Datacap Navigator Job, and tasks.

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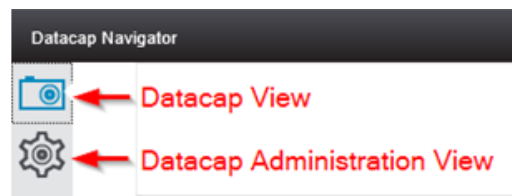
Figure 1-31. Why is this lesson important to you?

F2571.0

Notes:

Views in Datacap Navigator

- In Datacap Navigator, there are two views (Features)
 - Datacap View for the business users
 - Datacap Administration View for administrators



- Datacap Navigator client can contain:
 - Only the Datacap main view or Administration view, or both views
 - Datacap plug-in installation creates all the clients
- You can add more features such as Browse or Search
 - To browse folders or search for documents that are exported

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Figure 1-32. Views in Datacap Navigator

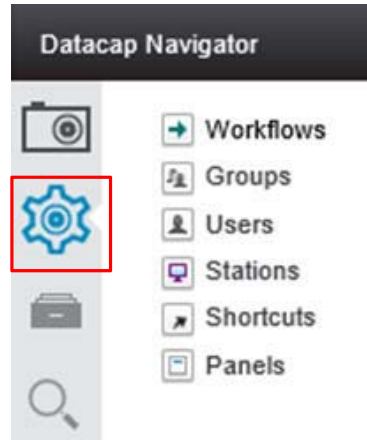
F2571.0

Notes:

- The screen capture shows the features in Datacap Navigator.
- Completed Datacap documents can be exported to a repository for storage. These repositories can be accessed in Datacap Navigator.
- You can open the Datacap documents in Search or Browse Views because of the Content Management capabilities of IBM Content Navigator.

Datacap Administration View

- In the Administration View, you can configure the following items:
 - Workflows
 - Groups
 - Users
 - Stations
 - Shortcuts
 - Panels



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Figure 1-33. Datacap Administration View

F2571.0

Notes:

The screen capture shows the Administration View in Datacap Navigator.

Datacap Administration View - Workflows

- You create or modify Jobs and tasks for the Datacap Navigator.

Jobs for a workflow

Tasks for a Job

Workflow: TravelDocs

General **Jobs**

New Job Edit Refresh Delete

Name	Description
Main Job	Main Job
Fixup Job	Fixup Job
Web Job	Web Job
Navigator Fixup Job	
Navigator Job	Navigator Job for new client

Job: Navigator Job

General **Tasks**

New Task Edit Refresh Delete Move Up Move Down

Name	Description	Mode	Program	Queue By
Scan	Scan with Navigator Client	Batch creation	Scan.js	None
NUpload	Upload with Navigator Client	Normal	Upload.js	None
PageID	Page Identification Rules	Normal	rulerunner.exe	None
NProfiler	Recognize/Validate w/Rules	Router	rulerunner.exe	None
Verify	Verify with Rule Validation	Normal	super.aspx	None
Export	Export via Rules	Normal	rulerunner.exe	None

Task: Scan

General **Advanced**

- Batch processing
- Rulerunner settings
- Custom web panels
- Start batch panel

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Figure 1-34. Datacap Administration View - Workflows

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Notes:

Workflow

Datacap applications can include one or more workflows.

- Consists of a series of tasks
- Defines a way to process documents
- Is associated with only one DCO

Jobs

Application Wizard creates a standard workflow that contains the following job types:

- Main Job**

It processes a batch of documents through each of the processing steps such as input documents, identify pages, verify, and export.

- Fixup Job**

It is used only when there are document integrity problems.

It displays the batch to an operator for corrective action.

- **Web Job**

It is like the Main Job, but it defines the workflow for jobs that are initiated exclusively from the Datacap Web Client.

It supports remote scanning and allows users to upload new batches to the server.

- **Navigator Job**

It is like the Web Job, but it defines the workflow for jobs that are initiated from Datacap Navigator.

Tasks

- A job consists of one or more tasks.
- To process a batch of documents, you must run the batch through each task in the selected job.
 - Some tasks run without operator intervention. Example: Export
 - Some other tasks require an operator. Example: Verify
- The job type that you select determines tasks in the workflow.
- The workflow for Navigator Job includes the following tasks:
Scan, NUpload, PageID, NProfiler, NVerify, and Export

Datacap Administration View – Groups and Users

- You create or modify the users in the Users section:
 - Set Permissions to tasks in an application.
Example: Scan, NUpload, Export
 - Specify privileges to components.
Example: View Job Monitor, Delete batches
- You create or modify the groups in the Groups section:
 - Set Permissions
 - Specify the privileges
 - Assign Users to a group

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Figure 1-35. Datacap Administration View – Groups and Users

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Notes:

Help path:

- IBM Datacap 9.0.1 > Administering your system > Datacap web clients administration > Users, groups, and stations administration

http://www.ibm.com/support/knowledgecenter/SSZRWW_9.0.1/com.ibm.dc.admin.doc/dcaad001.htm

If your environment has multiple Datacap servers, the privileges and permissions that are assigned to users, groups, and stations for an application are effective only on the Datacap server where you configure.

All Datacap Server Services that connect to the application must be restarted.

Datacap Administration View – Stations and Shortcuts

- You can do the following items in the Stations feature:
 - Create or modify Stations
 - Specify Permissions
- You can do the following items in the Shortcuts feature:
 - Create or modify Shortcuts
 - Specify Permissions

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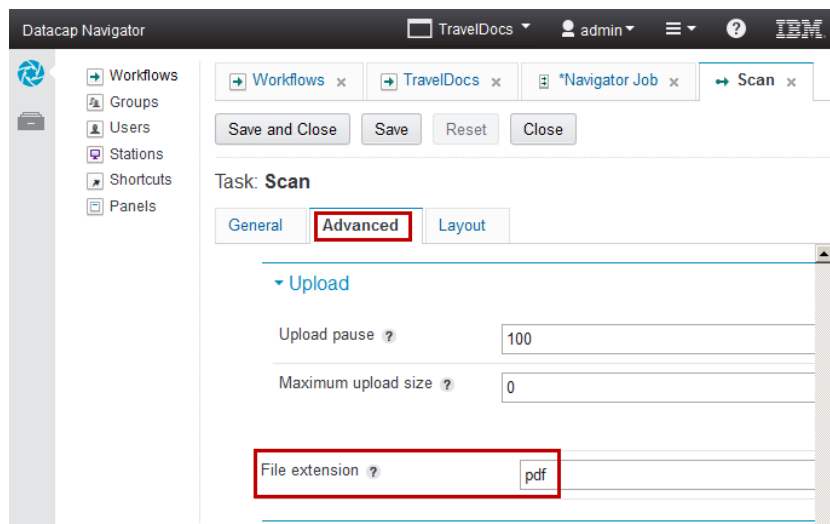
Figure 1-36. Datacap Administration View – Stations and Shortcuts

F2571.0

Notes:

Datacap Navigator – Configure to scan the PDF documents

- Configure to scan the PDF documents in IBM Datacap Navigator administration view:
 - Set the File extension to PDF on the Advanced tab for the Scan task.



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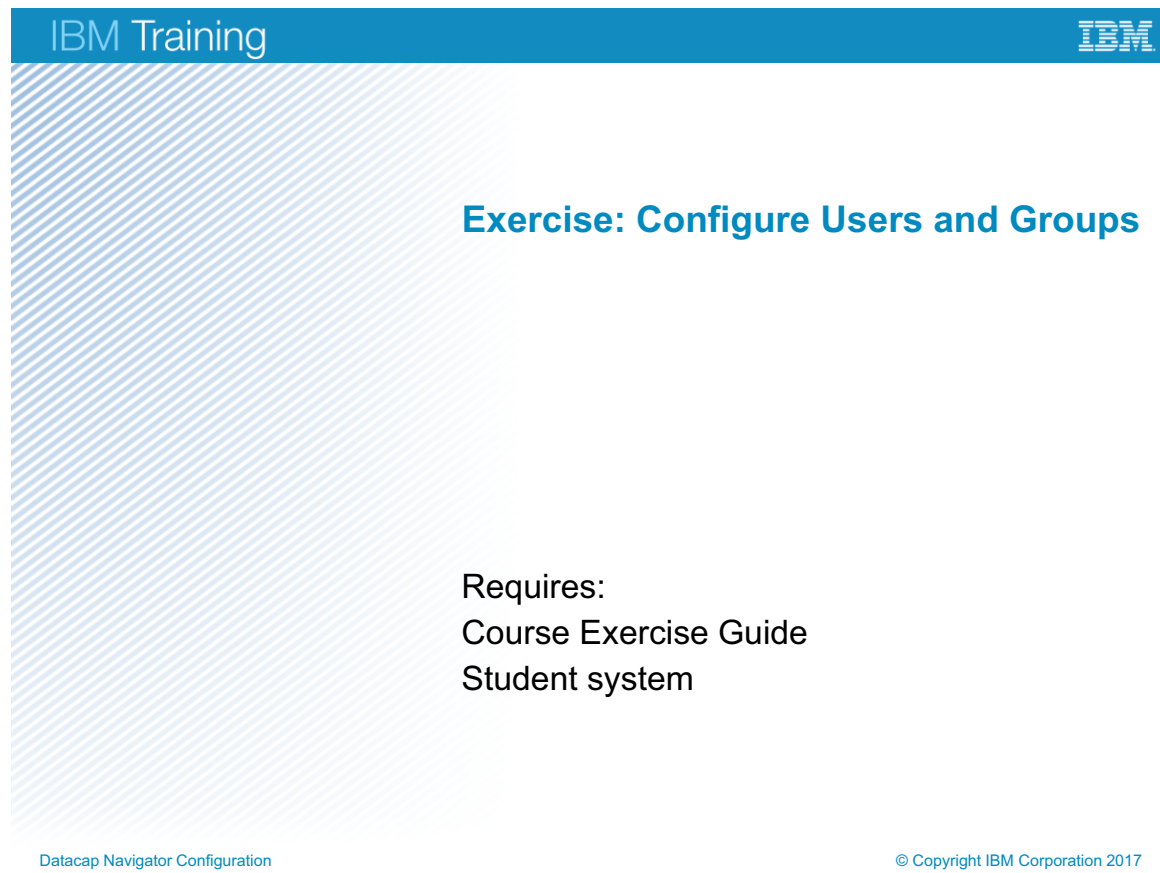
Figure 1-37. Datacap Navigator – Configure to scan the PDF documents

F2571.0

Notes:

Use Case Scenario

- An insurance company has an IBM Datacap application and is using Datacap Navigator as the client. Insurance agents can scan documents using a scanner attached to their workstation as well as upload them from disk as long as they are in PDF format. Scanning works well, however, users report being unable to scan PDF documents from disk and instead receive the following error message: "There are no files with extension tif in the selected directory."
- What configuration should the administrator check to make sure users can 'scan' PDF documents from disk?
- In IBM Datacap Navigator administration view, make sure the File extension, on the Advanced tab in the Scan task, is set to PDF.

The slide features a blue header with 'IBM Training' on the left and the 'IBM' logo on the right. The main content area has a light blue diagonal line pattern on the left side. The title 'Exercise: Configure Users and Groups' is centered in blue. Below it, the requirements are listed in black text. At the bottom, there are two small blue footnotes: 'Datacap Navigator Configuration' on the left and '© Copyright IBM Corporation 2017' on the right.

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Exercise: Configure Users and Groups

Requires:
Course Exercise Guide
Student system

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Figure 1-38. Exercise: Configure Users and Groups

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Notes:

Exercise objectives

- Create Users and Groups



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Figure 1-39. Exercise objectives

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Notes:

Lesson 1.4. Enable Rescan for the Verify task

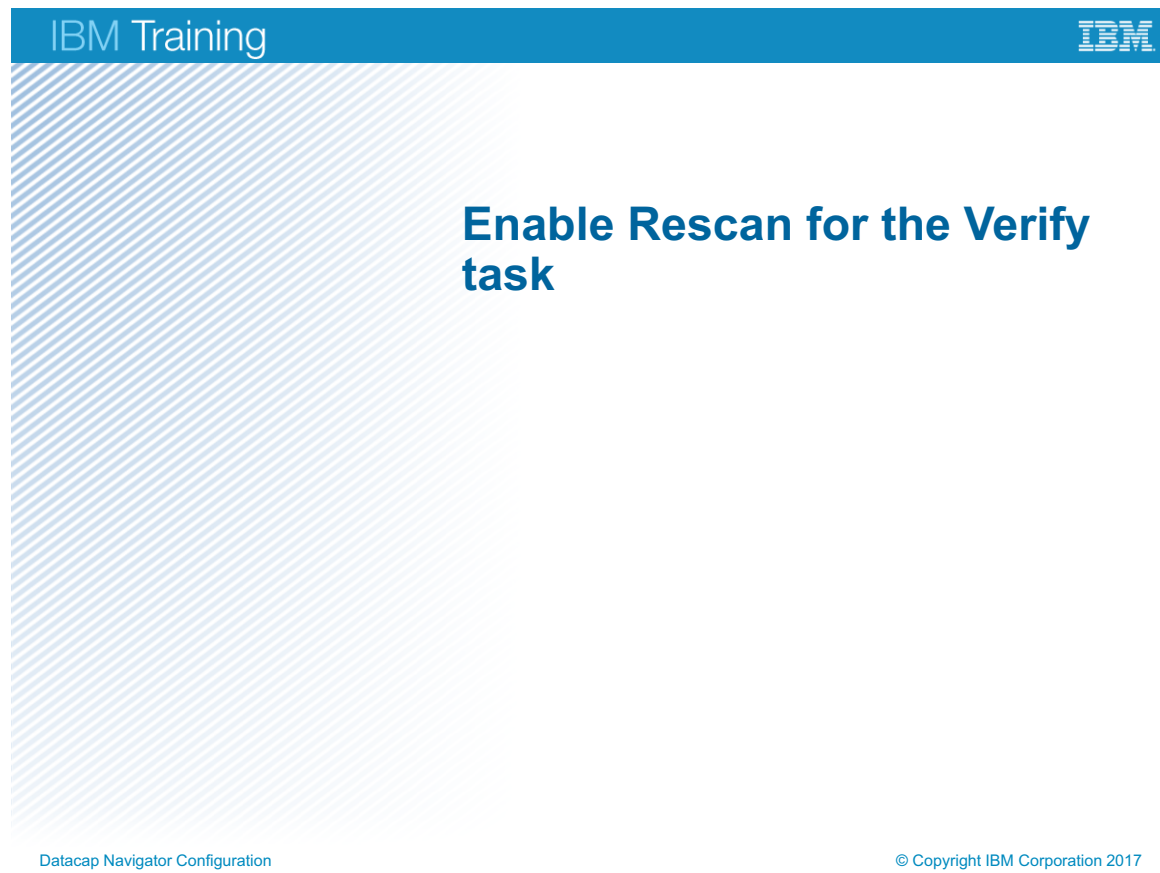


Figure 1-40. Enable Rescan for the Verify task

F2571.0

Notes:

Topics

- Navigator Updates
- Change Datacap Navigator User Settings
- Configure Users and Groups
- ▶ Enable Rescan for the Verify task
- Create Custom Panels
- Implement External Data Services
- Transactional Capture
- Install and Customize Datacap Navigator

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Figure 1-41. Topics

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Notes:

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 NVerify and Nfixup tasks.

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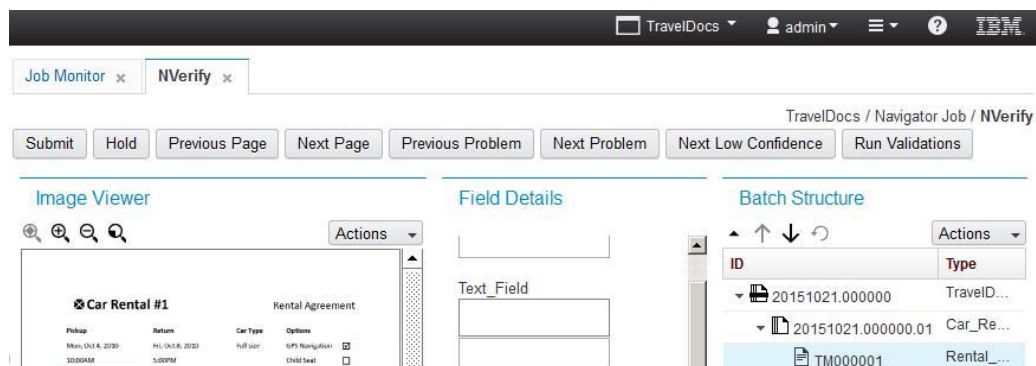
Figure 1-42. Why is this lesson important to you?

F2571.0

Notes:

Verify Task - Default view

- You can rescan documents in the NVerify task.
 - By default, the Rescan option is not visible on the task page.
 - Enable it in the Datacap admin tool.



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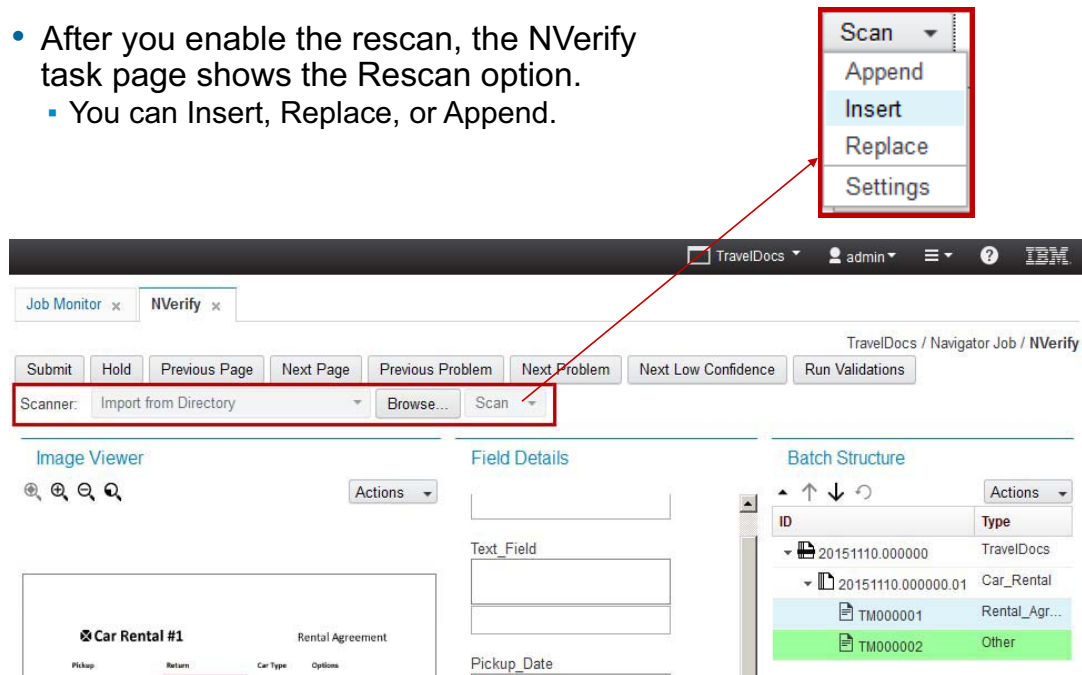
Figure 1-43. Verify Task - Default view

F2571.0

Notes:

Verify Task - with Rescan enabled

- After you enable the rescan, the NVerify task page shows the Rescan option.
 - You can Insert, Replace, or Append.



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Figure 1-44. Verify Task - with Rescan enabled

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Notes:

Enable the Rescan in Datacap Navigator

- In the Datacap Navigator Administration view:
 - Open the Workflows > TravelDocs > Navigator Job > NVerify task.
 - Go to "Batch processing" section in the "Advanced" tab.
 - Select the "Allow Rescan" option.

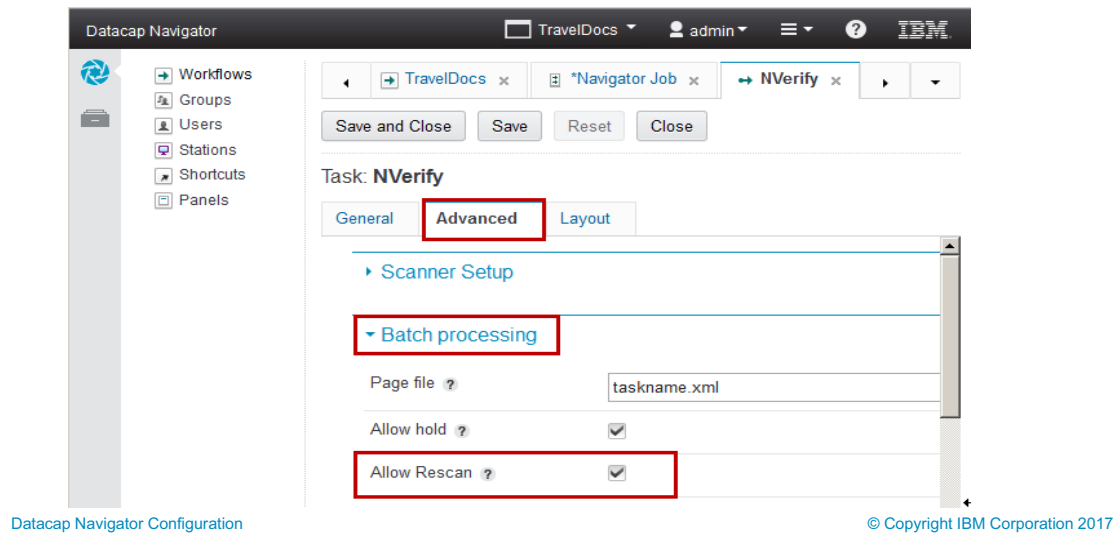


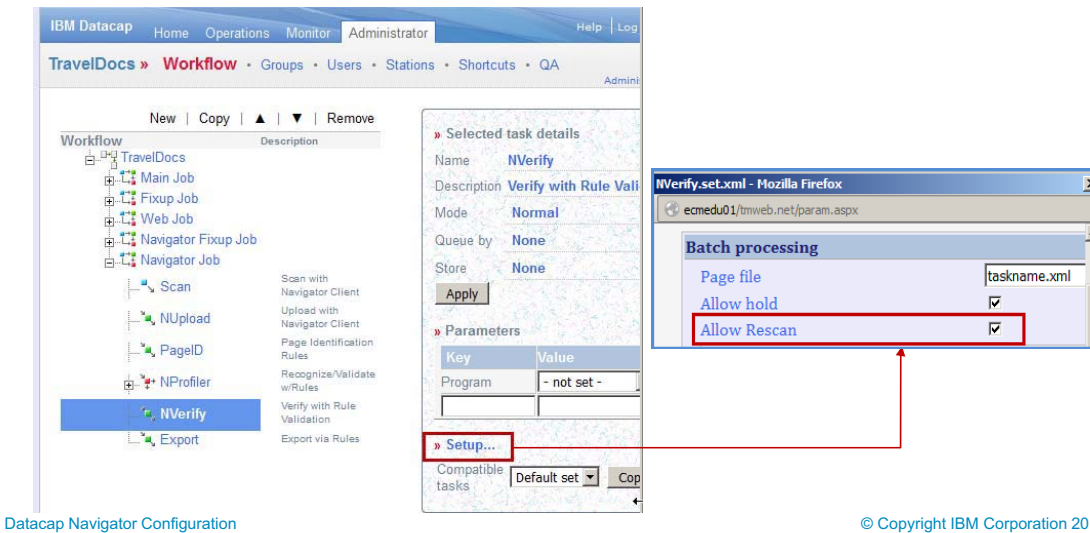
Figure 1-45. Enable the Rescan in Datacap Navigator

F2571.0

Notes:

Enable the Rescan in tmweb client

- In the tmweb client:
 - Open the Administrator tab > Workflow tab.
 - Expand TravelDocs > Navigator Job and select the NVerify task.
 - Go to Setup > "Batch processing" and select the "Allow Rescan" option.



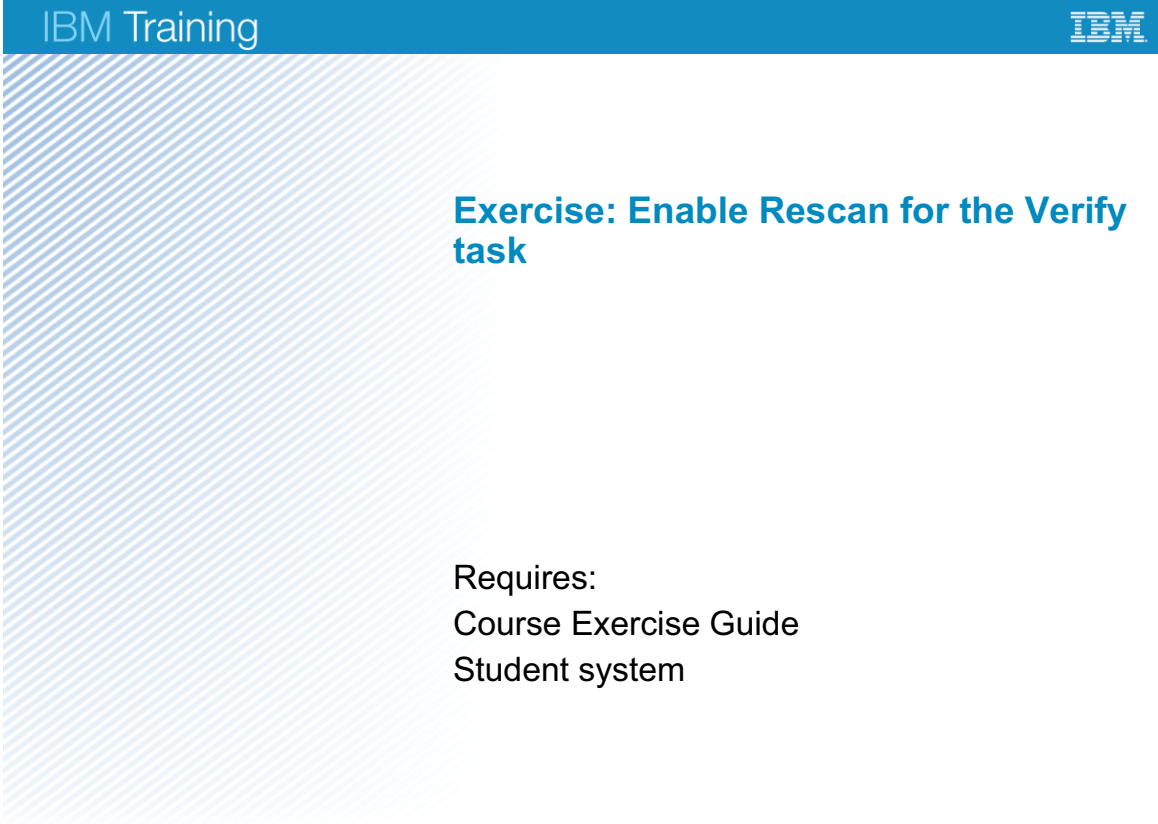
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Figure 1-46. Enable the Rescan in tmweb client

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Notes:



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Exercise: Enable Rescan for the Verify task

Requires:
Course Exercise Guide
Student system

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Figure 1-47. Exercise: Enable Rescan for the Verify task

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Notes:

Exercise objectives

- Enable Rescan for the Verify task.



Notes:

Lesson 1.5. Create Custom Panels



Figure 1-49. Create Custom Panels

F2571.0

Notes:

Topics

- Navigator Updates
- Change Datacap Navigator User Settings
- Configure Users and Groups
- Enable Rescan for the Verify task
- ▶ Create Custom Panels
 - Implement External Data Services
 - Transactional Capture
 - Install and Customize Datacap Navigator

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Figure 1-50. Topics

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Notes:

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 panes and associate it with a task.

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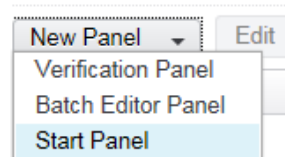
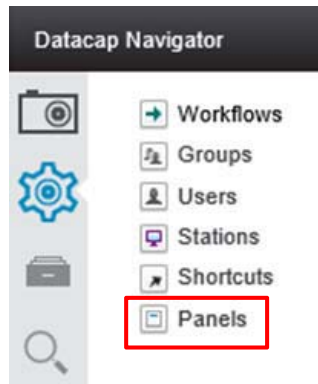
Figure 1-51. Why is this lesson important to you?

F2571.0

Notes:

Datacap Administration View – Custom Panels

- Use the Panels feature in the Datacap Navigator Administration view to create or modify panels.
- You can create or modify the following type of panels:
 - Verification
 - Batch Editor
 - Start



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Figure 1-52. Datacap Administration View – Custom Panels

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Notes:

What are Custom Panels?

- 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 dynamically generates these panels.
 - Does not require any extra setup.
- Optionally, you can create custom panels to change the:
 - Layout of the fields and appearance.
 - Behavior of the panel (Example: set a property as required).

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Figure 1-53. What are Custom Panels?

F2571.0

Notes:

Designing Custom Panels

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

Batch Structure

Remove the fields that you don't need

Rearrange the field positions

Set a field as required, hidden, or prefill with a value

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
20150422.000000.01	Car_Rent	OK
TM000001	Rental_Ag	Problem

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Figure 1-54. Designing Custom Panels

F2571.0

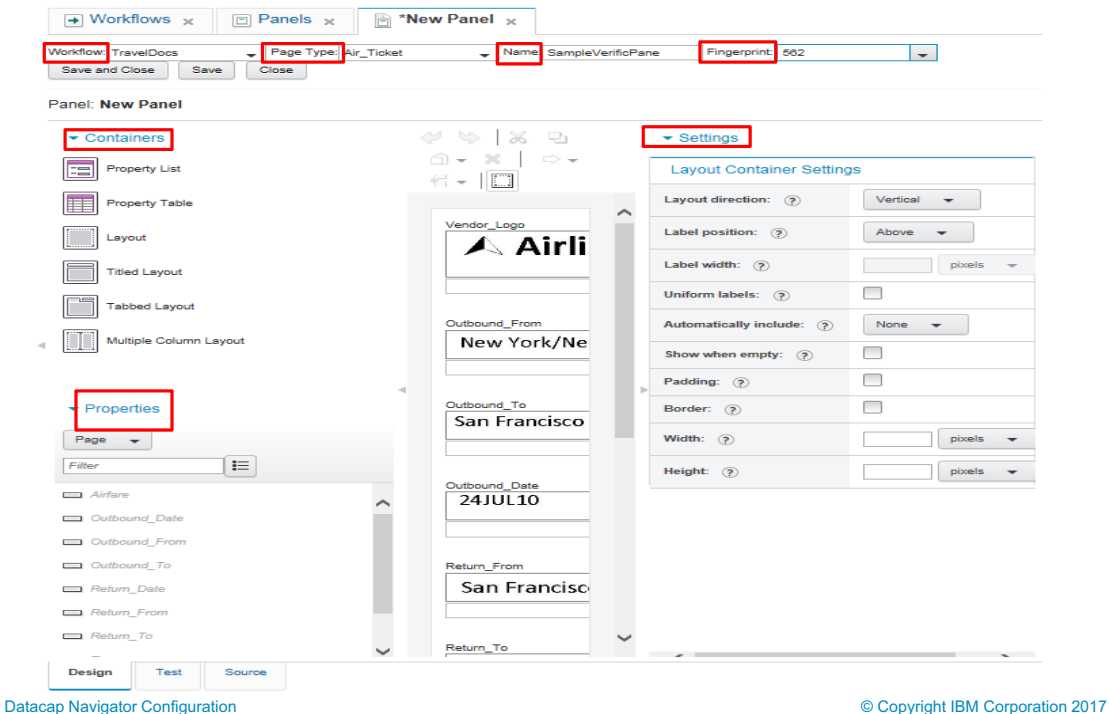
Notes:

The screen capture shows a default “Field Details Panel” in the “Verify” task.

Following items are some of the changes that you can add to your custom panel:

- Remove unused system generated fields.
- Rearrange the layout of the fields.
- You can modify the behavior of a field to be “required”, “hidden”, or “prefill a value”.

Create a custom panel : Verification Panel



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Figure 1-55. Create a custom panel : Verification Panel

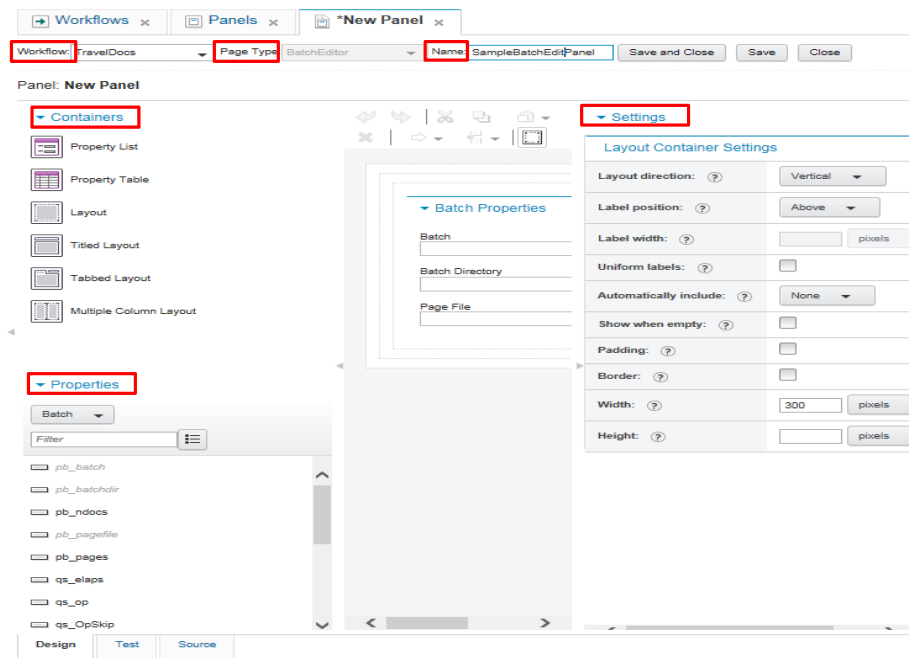
F2571.0

Notes:

The screen capture shows the “Verification Panel”. To create a new one enter the following values:

- Workflow
- Page Type – for which page type you are creating this panel.
- Name – For your custom panel
 - Fingerprint - to use for the image snippet in the panel area
- Containers – Example: Titled, Tabbed layout, or Multi Column layout
- Properties - Fields that are in your page type
- Drag the containers and properties to the panel area, and configure in “Settings” panel.

Create a custom panel: Batch Editor Panel



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Figure 1-56. Create a custom panel: Batch Editor Panel

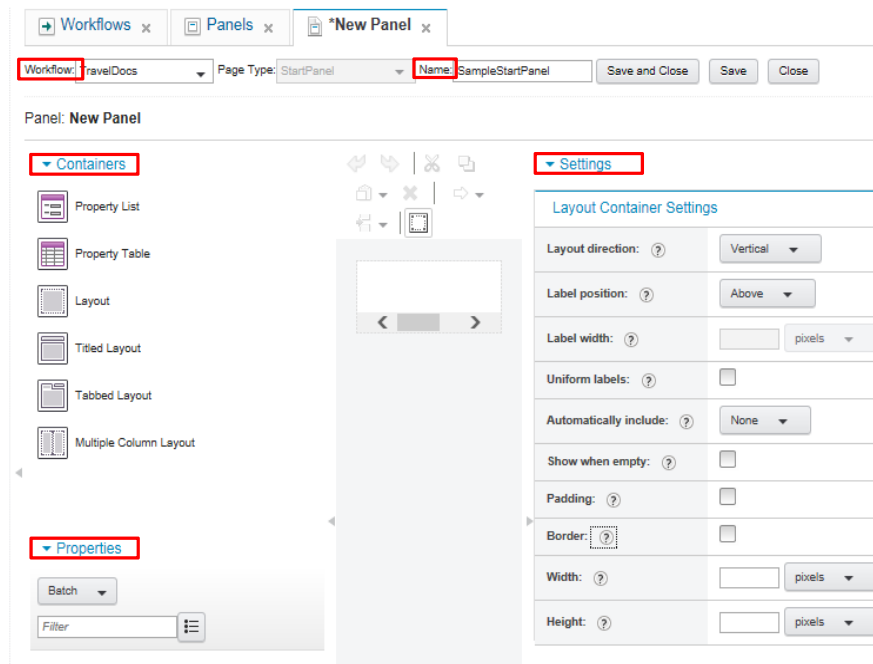
F2571.0

Notes:

The screen capture shows the “Batch Editor Panel”. To create a new one enter the following values:

- Workflow
- Name – For your custom panel
- Containers – Example: Titled, Tabbed layout
- Properties - Batch attributes and extra fields, and batch level fields of your workflow
- Drag the containers and properties to the panel area, and configure in “Settings” panel

Create a custom panel: Start Panel



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Figure 1-57. Create a custom panel: Start Panel

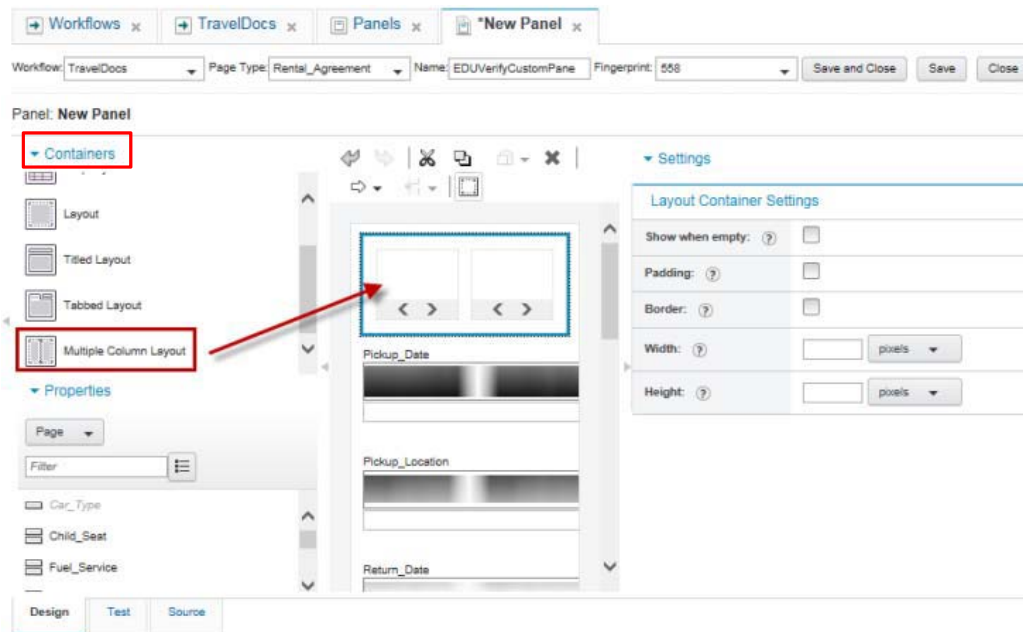
F2571.0

Notes:

The screen capture shows the “Start Panel”. To create a new one enter the following values:

- Workflow
- Name – For your custom panel
- Containers – Example: Titled, Tabbed layout
- Properties - Extra fields and batch level fields of your workflow
- Drag the containers and properties to the panel area, and configure in “Settings” panel

Use Containers for the fields in Custom Panels



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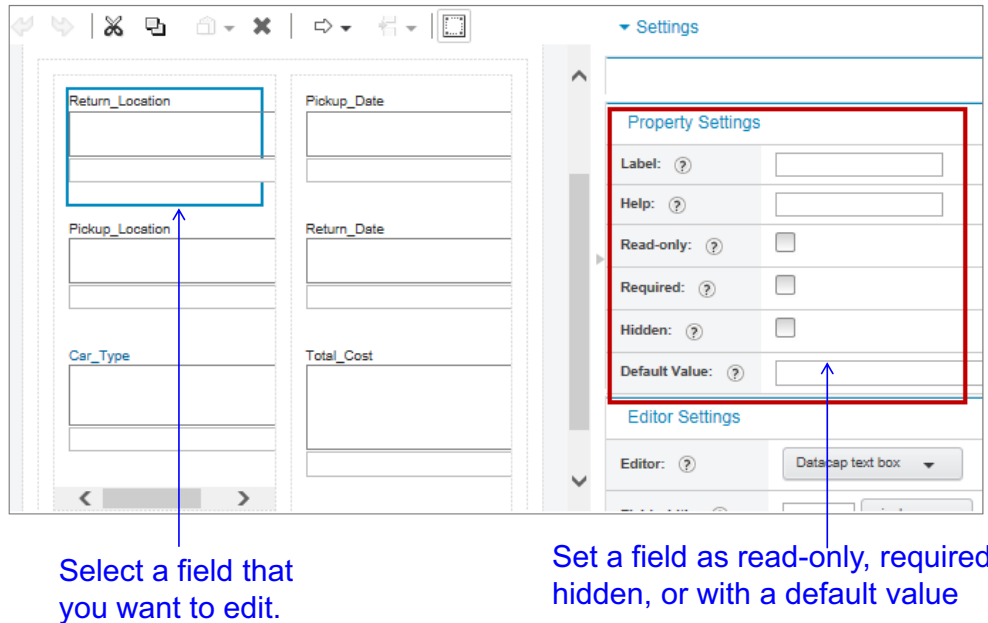
Figure 1-58. Use Containers for the fields in Custom Panels

F2571.0

Notes:

The screen capture shows how you can drag a container to a custom panel. Use containers to work with the layout of the fields.

Change the behavior for the fields in Custom Panels



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Figure 1-59. Change the behavior for the fields in Custom Panels

F2571.0

Notes:

The screen capture shows how you can change the behavior of a field in a custom panel.

Assign a custom panel to a task

Task: **Verify**

General **Advanced**

Image enter

Custom web panels

Use custom web panels ? ☒ ← Enable the option

Bind TYPE to ascx panel ? + -

Panel for **Rental_Agreement** : **EDUVerifyCustomPanel**

Page type Custom panel name

DCO tree view

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Figure 1-60. Assign a custom panel to a task

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Notes:

The screen capture shows how to assign a custom panel to a task. You configure this setting in the Advanced tab of the task > Custom web panels section.

- Enable the option to use custom web panels.
- Provide the page type and the name of the custom panel.

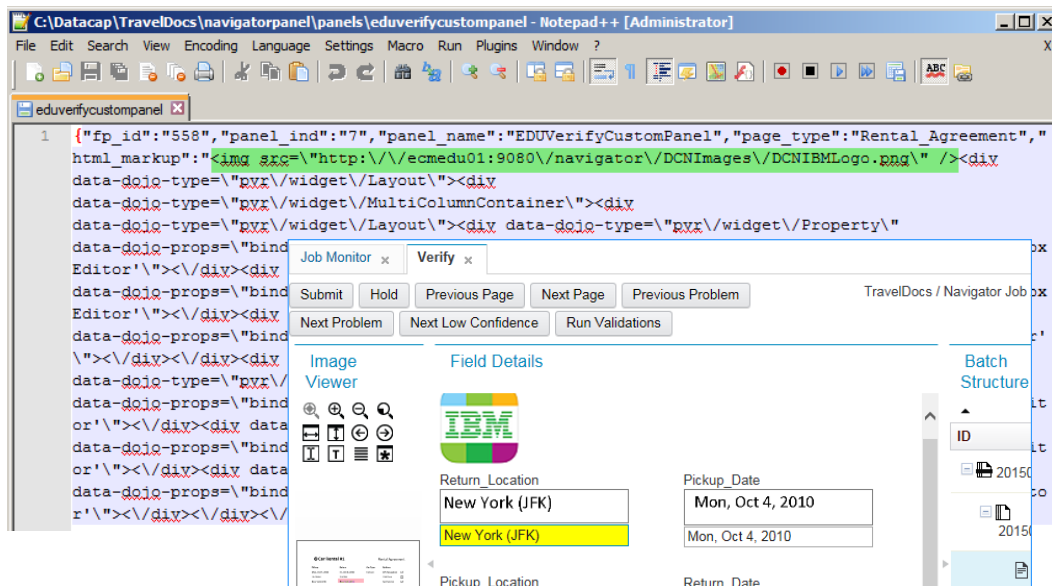
Modify the custom panel – Edit the Panel data file

- 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.
 - Panel data files are stored within their corresponding Datacap application folder.
 - Each panel file is stored with the panel name as the file name.
 - To modify a panel, you edit this file.

Notes:

Sample edit to the panel data file

The screen capture shows a sample edit to the panel data file.



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Figure 1-62. Sample edit to the panel data file

F2571.0

Notes:

The screen capture shows a sample edit to the panel data file.

- 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.
- In this example, a URL of the image file that displays an IBM logo image on top of the panel, is added. (highlighted in green)

Demonstrations

- Create a custom Panel for a task

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Figure 1-63. Demonstrations

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Notes:

If you are taking this course as a self-paced virtual course, return to the main course menu to play the pre-recorded demonstrations.

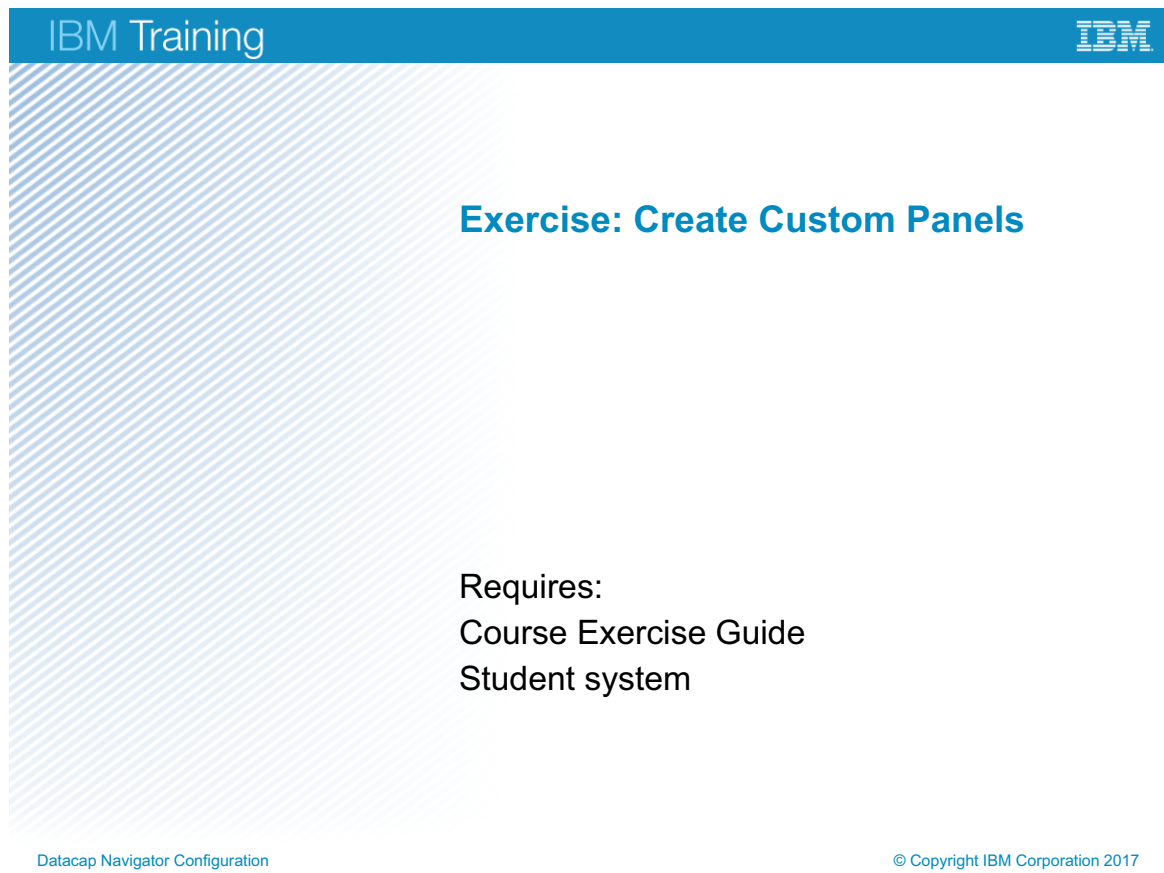


Figure 1-64. Exercise: Create Custom Panels

F2571.0

Notes:

Exercise objectives

- Create a custom Panel for a task.
- Modify the custom panel in the panel data file (optional)



Notes:

Lesson 1.6. Implement External Data Services

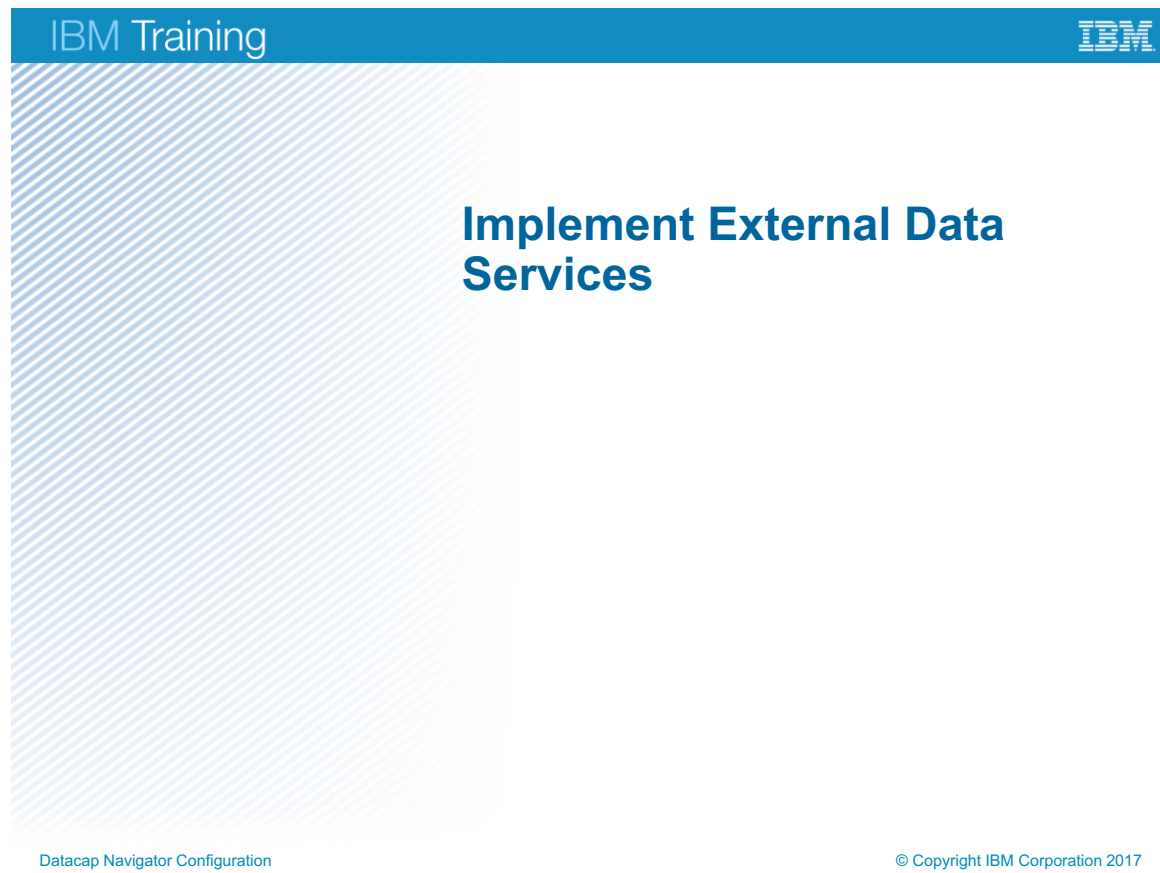


Figure 1-66. Implement External Data Services

F2571.0

Notes:

Topics

- Navigator Updates
- Change Datacap Navigator User Settings
- Configure Users and Groups
- Enable Rescan for the Verify task
- Create Custom Panels
- ▶ Implement External Data Services
 - Transactional Capture
 - Install and Customize Datacap Navigator

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Figure 1-67. Topics

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Notes:

Why is this lesson important to you?

- You want to configure your application to look up choice list values from the external source. You also want to set the field status, and do data validation for the data fields.
- You want to customize the cells and columns in Job Monitor.
- As a Datacap Administrator, you configure an external data service (EDS) for the Datacap Navigator to complete these tasks.

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Figure 1-68. Why is this lesson important to you?

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Notes:

What are External Data Services (EDS)?

- In IBM Content Navigator, the external data service (EDS) is
 - A plug-in to modify fields behavior.
 - Based on Representational State Transfer (REST) protocol.
 - Designed as a quick and easy starting point for your customization, without the need to implement a plug-in.
- You can also create your own plug-in based on the EDS REST protocol to:
 - Get data from an external source (Example: a file or database table).
 - Customize field properties.
 - Manage property behavior.
- One of the main advantages in IBM Content Navigator is the ability to extend the system.
 - No need to modify the source code to customize the user interface properties and values.

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Figure 1-69. What are External Data Services (EDS)?

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Notes:

An advantage to using an external data service is that you do not need to modify the IBM Content Navigator source code to customize the user interface properties and values.

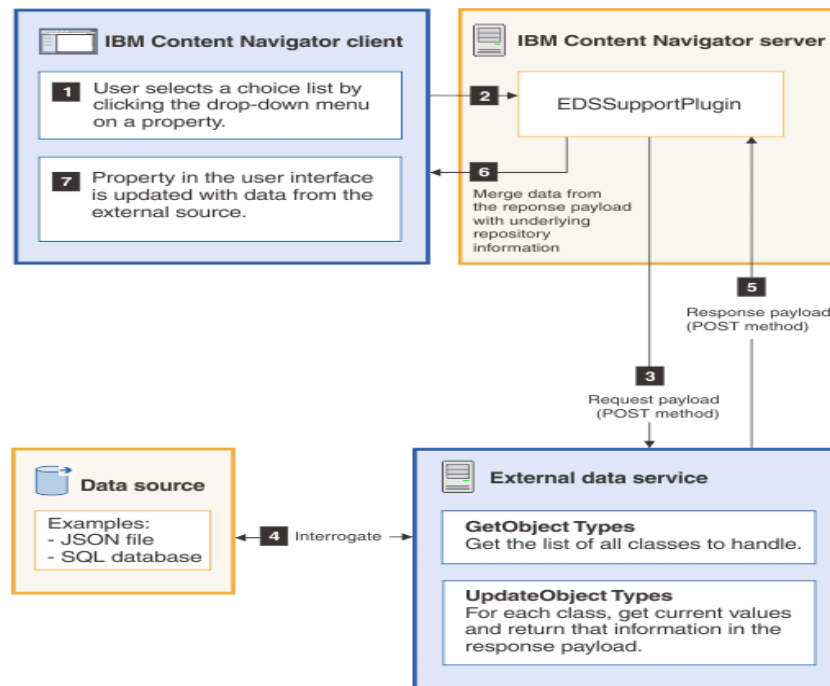
Therefore, upgrades and other major changes to IBM Content Navigator do not affect the property data from an external data service. The data and external data service are located separately from IBM Content Navigator source code.

Request or Response filters

- In IBM Content Navigator, when a service call is run:
 - A request is sent to the service and the response is sent back from the service to the client tier.
 - The requests and responses are in a standard JSON format.
- Request or Response filter
 - Stands between the client and the service, and modifies the responses and requests as needed.
- In IBM Content Navigator, the external data service (EDS) is
 - An implementation of the request and response filters.

Notes:

External Data Services architecture



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Figure 1-71. External Data Services architecture

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Notes:

The diagram shows how an external data service submits and returns requests. When an external data service is implemented for a certain action or property, the service is started when a business user interacts with that item in the web client. The following diagram shows how an external data service submits and returns requests.

1. User selects a choice list by clicking the menu on a property.
2. IBM Navigator client sends the request to the server > EDS plug-in.
3. The request payload is sent to the External Data Service.
4. Which gets the data from the source.
5. The Response payload is sent back to the server > EDS plug-in.
6. The data from the response payload is merged with underlying repository information.
7. The Property in the user interface is updated with the data from the external source.

What happens to the data when EDS is implemented?

- Continue to store and maintain the data only in the original, authoritative data source.
 - When an EDS is implemented, only the existing data is integrated with IBM Content Navigator field values and other field properties.
- Access the data without having to move or copy that data to a separate repository.
 - The source remains in the original data store.
- The external data source must remain available to Content Navigator.
 - So that the external data can be accessed whenever the business user starts the service through the web client.

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Figure 1-72. What happens to the data when EDS is implemented?

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Notes:

When to use the sample EDS?

- Use EDS to do the following tasks:
 - Look up the choice list values for a data field or dependent field.
 - Set minimum and maximum values.
 - Prefill property values
 - Set property status, such as read-only, required, or hidden.
 - Implement property validation and error checking.
 - Customize the Job Monitor cells and columns

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Figure 1-73. When to use the sample EDS?

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Notes:

Help path:

IBM Datacap 9.0.1>Administering your system>Datacap web clients administration>Administering Datacap Navigator>External data services for Datacap Navigator

http://www.ibm.com/support/knowledgecenter/SSZRWW_9.0.1/com.ibm.dc.admin.doc/dcnav004.htm

You can use an external data service to customize the following field properties and property behaviors:

Look up the choice list values for a data field or dependent field

- Create choice lists by using existing data that is managed in a different content repository or data source than the one that is connected to IBM Content Navigator.
- For example, you can use values in a file that is located and managed in an external server or repository.

Specify property dependencies

- Define dependencies between properties.

- For example, you might specify a dependency between a geographic region choice list property and an office branch choice list property. So that when a user chooses a geographic region, the subsequent choice list that depends on the selected geographic region contains only the office branches that pertain to that geographic region.

Set minimum and maximum values

- Specify an integer, float, or date to define the maximum or minimum value for a property.
- Restriction: You cannot reset the minimum value or maximum value to be less restrictive than the minimum value or maximum value that is specified in the repository that you are using.
- For example, if the minimum value in the repository is 100, the service can set the value to 150, but not to 50.

Prefill properties

- Specify prefilled properties and default values.
- For example, you can prefill fields with custom default values that are based on a particular class ID, authenticated user, or the parent folder.

Set read-only status

- You might create a property that requires a particular value.
- To prevent users from entering a different value that might cause an error, you can specify the correct default value and make that property read-only.

Set required status

- Set a property to be a required field.
- When you use this attribute on a property, an asterisk appears in the user interface to indicate that the field is required.
- Users cannot proceed from the page or dialog box unless the field contains a value.

Set hidden status

- Hide a property from the user interface.
- For example, you might create a choice list that dynamically determines subsequent text input fields to present in a form.
- To hide a property that does not apply in a particular situation, you can use the hidden attribute.

Implement property validation and error checking

Show a custom message when users enter values into a property field.

IBM Content Navigator sample EDS implementation

- The sample EDS service is a simple web application that contains two Java servlet classes.
 - `GetObjectTypesServlet`
 - Provides an HTTP GET service to determine the list of object types that this EDS implementation supports.
 - `UpdateObjectTypeServlet`
 - Provides the HTTP POST service to obtain external data and dynamically change, validate, and enrich metadata in real time.
- The rest of the files are JavaScript Object Notation (JSON) files
 - Store the property behavior definition and data list for the EDS implementation.
 - `ObjectTypes.json` is the key file that describes which classes in the repository that works with the EDS service.
 - You must edit the JSON files and configure your system for EDS to work in your system.

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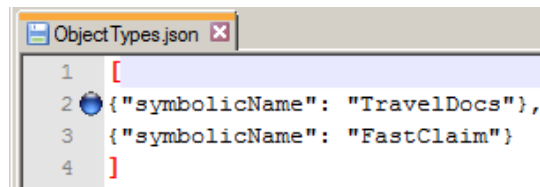
Figure 1-74. IBM Content Navigator sample EDS implementation

F2571.0

Notes:

ObjectTypes.json file

- A key file that describes which classes in the repository that works with the EDS service.
- You must edit this JSON file to include the property data files.
- Example: TravelDocs



```
1 [
2  {"symbolicName": "TravelDocs"},
3  {"symbolicName": "FastClaim"}
4 ]
```

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Figure 1-75. ObjectTypes.json file

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Notes:

Configure data validation for a field

Default property behavior:

If this field does not have a value, no error is shown.

Total_Cost

EDS implementation:

The JSON file specifies that a value is required for this field.

```

1 [{"symbolicName": "Total_Cost",
2   "required": true
3   }
4 ]
5 ]

```

Behavior after data validation is implemented for "value Required":

An error is shown if the field is empty. The property also has an asterisks symbol to indicate that the value is required.

→ * Total_Cost

This value is required.

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Figure 1-76. Configure data validation for a field

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Notes:

Create choice lists with External Data Service (EDS)

- The choice lists are pre-configured so that users avoid any errors from typing the data.
 - One of the main features of EDS is to provide values for choice lists.
 - The choice lists can be
 - Hierarchical
 - Dependent

The screenshot shows a 'Field Details' configuration window. It contains three fields: 'Text_Field' with an empty input box, 'Pickup_Date' with a date picker set to 'Mon, Oct 4, 2010', and 'Pickup_Location' with a dropdown menu. The dropdown menu is open, showing a list of locations: 'New York (JFK)', 'Los Angeles (LAX)', 'Chicago (ORD)', and 'Orlando (MCO)'. The 'New York (JFK)' option is highlighted in blue. A red rectangle is drawn around the dropdown menu.

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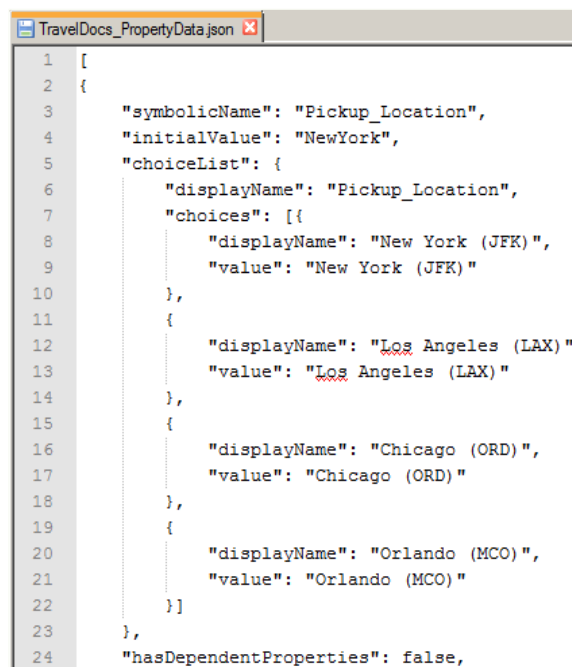
Figure 1-77. Create choice lists with External Data Service (EDS)

F2571.0

Notes:

JSON format for the choice lists

- Each object class must have a corresponding JSON file with the same object name.
- Within each JSON file, square brackets [] surround a list of object properties to represent an array.
- Within the array, curly braces {} surround each property with its attributes.
- Within each property, arrays of attributes are provided for that property such as choice items.



```

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": false,

```

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Figure 1-78. JSON format for the choice lists

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Notes:

The screen capture shows an example of a JSON file for an object class ("TravelDocs", Datacap application name). The file contains fields that are specific for the application.

Customize the Job Monitor

- You can customize the Job Monitor page using EDS.

	Queue ID ▾	Batch	Job	Task	Status	Job Start	Job Time	Operator
●	17	20151105.000003	Navigator Job	Scan	hold	11/5/2015, 7:22 PM	100%	admin
●	16	20151105.000002	Navigator Job	Scan	running	11/5/2015, 7:18 PM	0%	admin
●	15	20151105.000001	Navigator Job	Scan	hold	11/5/2015, 7:03 PM	100%	admin
●	14	20151105.000000	Navigator Job	Scan	aborted	11/5/2015, 6:56 PM	0%	admin
●	12	20151102.000000	Navigator Job	NVerify	running	11/2/2015, 8:40 PM	0%	admin

Change the value or style for a cell.

Show a Dojo widget in a cell.
Example: Progress bar

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Figure 1-79. Customize the Job Monitor

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Notes:

Help path:

IBM Datacap 9.0.1>Administering your system>Datacap web clients administration>Administering Datacap Navigator>Customizing Job Monitor

http://www.ibm.com/support/knowledgecenter/SSZRWW_9.0.1/com.ibm.dc.admin.doc/dcnv006.htm

You can customize the Job Monitor page using EDS.

- Add data columns from external data lookups.
- Modify the properties of a cell or column in Job Monitor.
- Show Dojo widgets in cells
- Examples of customization:

Change the value or style for a cell.

Change the column name.

Show a "Progress bar" in a cell using a Dojo widget.

Demonstrations

- Implement External Data Services

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Figure 1-80. Demonstrations

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Notes:

If you are taking this course as a self-paced virtual course, return to the main course menu to play the pre-recorded demonstrations.

IBM Training

IBM

Exercise: Implement External Data Services

Requires:
Course Exercise Guide
Student system

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Figure 1-81. Exercise: Implement External Data Services

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Notes:

Exercise objectives



- Register IBM Content Navigator EDS plug-in.
- Customize the Datacap Navigator Job Monitor page.
- Configure data validation for a field.
- Create Choice Lists with Sample EDS.

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Figure 1-82. Exercise objectives

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Notes:

Lesson 1.7. Transactional Capture

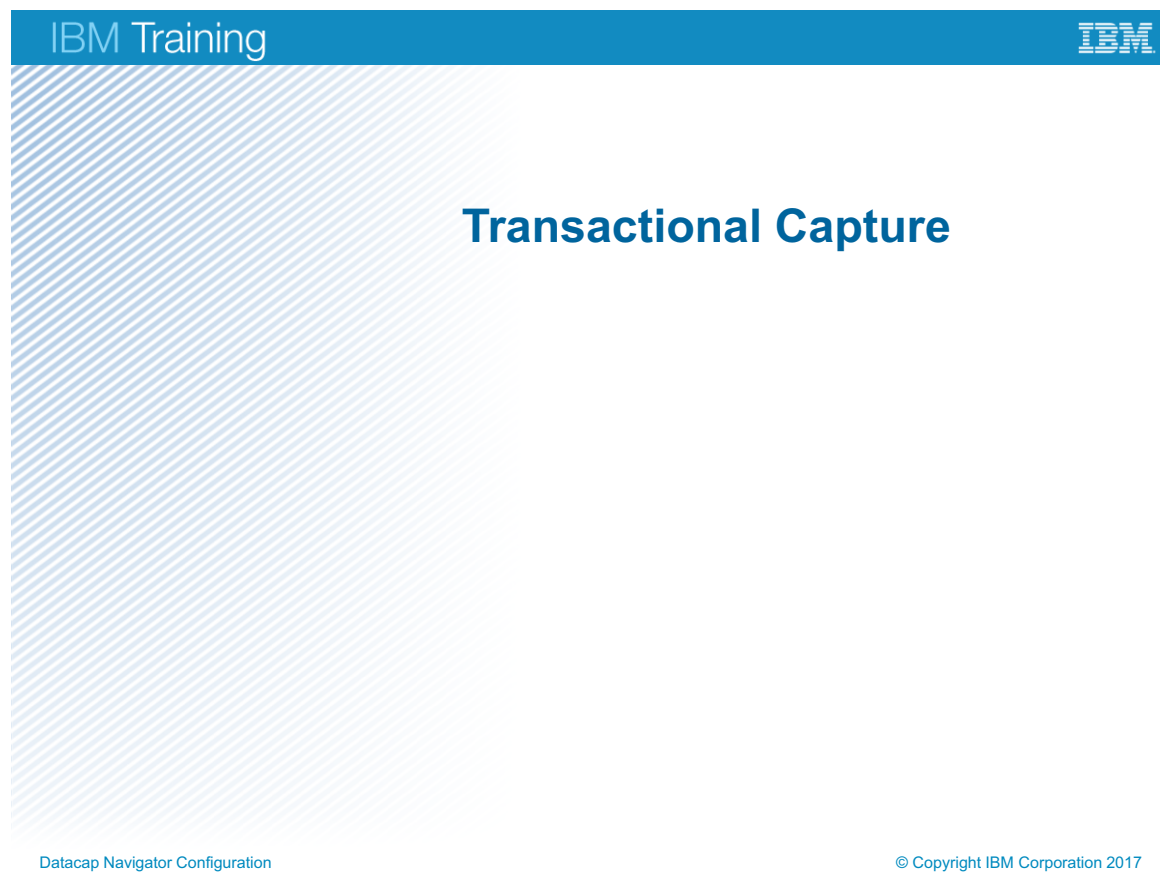


Figure 1-83. Transactional Capture

F2571.0

Notes:

Topics

- Navigator Updates
- Change Datacap Navigator User Settings
- Configure Users and Groups
- Enable Rescan for the Verify task
- Create Custom Panels
- Implement External Data Services
- ▶ Transactional Capture
 - Install and Customize Datacap Navigator

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Figure 1-84. Topics

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Notes:

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.

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Figure 1-85. Why is this lesson important to you?

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Notes:

Objectives

- Configure transactional capture.
 - Add Documents from Scanner
 - Capture Document Properties
 - Add to Batch

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Figure 1-86. Objectives

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Notes:

These activities are the activities that you are going to do in this lesson.

Add Documents from Scanner

- Scan documents directly into IBM Case Manager and IBM Content Navigator (ICN) repositories with the specified document class and properties.

Capture Document Properties

- Populate document properties automatically by capturing data from images with Datacap task profile defined in the application.

Add to Batch

- Select one or more documents from the ICN repository or the case, and add them to a new batch on Datacap Server.

Default Add Document Functionality

- There are three default functions:
- Add a local document.
 - Scan an image save it directly to a repository. Optionally, manually provide metadata allowed by the Document Class that is selected.
- Add document information
 - Manually provide metadata allowed by the Document Class that is selected. (No image is saved)
- Link to an external document
 - Provide a hyperlink to an external. Document. Optionally, manually provide metadata allowed by the Document Class that is selected.

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Figure 1-87. Default Add Document Functionality

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Notes:

Transactional Capture Functionality

- With Datacap Transactional Capture, users can:
 - Add Documents from Scanner
 - Scan documents directly into IBM Case Manager and IBM Content Navigator repositories with the specified document class and properties.
 - Capture Document Properties
 - Populate document properties automatically by capturing data from images via Datacap task profile defined in the application.
 - Add to Batch
 - Select one or more documents from the ICN repository or the case, and add them to a new batch on Datacap Server.

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Figure 1-88. Transactional Capture Functionality

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Notes:

Pre-requisite components

- Install the Datacap product, including Datacap Server, Datacap Web Services (wTM), and Datacap Studio (at least).
- Install the Web TWAIN service on the client machine
- Deploy the Datacap Navigator plug-in in the IBM Content Navigator

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Figure 1-89. Pre-requisite components

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Notes:

Configure a Datacap application document

- Configure a document type.
 - Document type has the same symbolic name as the document class defined in the IBM Content Navigator repository.
- Configure a page type.
 - Page fields have the same symbolic names as the properties under the document class in the IBM Content Navigator repository.

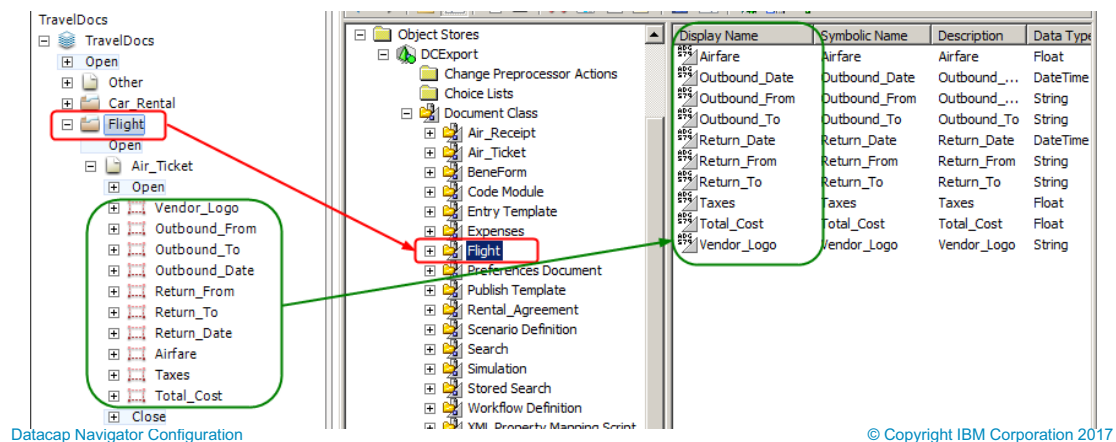


Figure 1-90. Configure a Datacap application document

F2571.0

Notes:

Help Path:

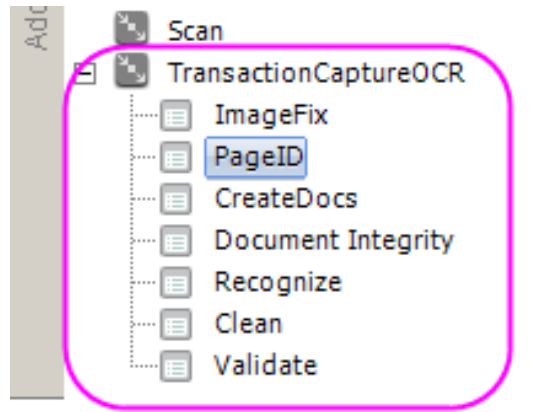
<http://www.ibm.com/support/docview.wss?uid=swg27046892>

Create an application or modify an existing application to enable the automatic extraction of metadata from the images and save them as document properties on the repository.

If your DCO is already created, then define a Document Class with the same logical name as the DCO document type. Make sure that the symbolic names for the Document Class properties exactly match the DCO page field names.

Configure the TransactionCaptureOCR

- Create a task profile.
 - Name it “TransactionCaptureOCR”.
 - Configure rulesets to capture data from the image.



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Figure 1-91. Configure the TransactionCaptureOCR

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Notes:

Create a task profile that matches the combination of the PageID task profile plus the Profiler task except for the router ruleset. This example is based on the TravelDocs application.

Direct scan from IBM Content Navigator and Case Manager

- New IBM Content Navigator widget
 - Scans and imports TIFF image files.
 - Adds a menu action or button to the IBM Case Manager and Browse user interface.
- Documents are stored directly in case and repository folders.
- Manage pages in filmstrip view:
 - move, delete, insert, and zoom

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Figure 1-92. Direct scan from IBM Content Navigator and Case Manager

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Notes:

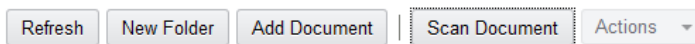
Make two Datacap Navigator interface changes

- Content list toolbar

- Default



- Customized



- Switch the Add Document widget.

- The Alternate widget provides the “Document from scanner” option.

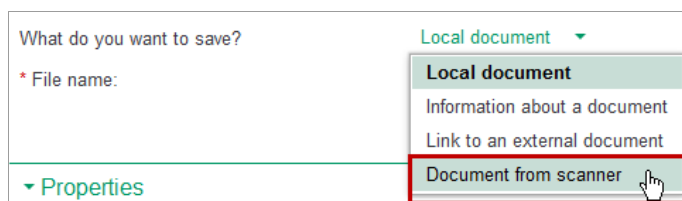


Figure 1-93. Make two Datacap Navigator interface changes

F2571.0

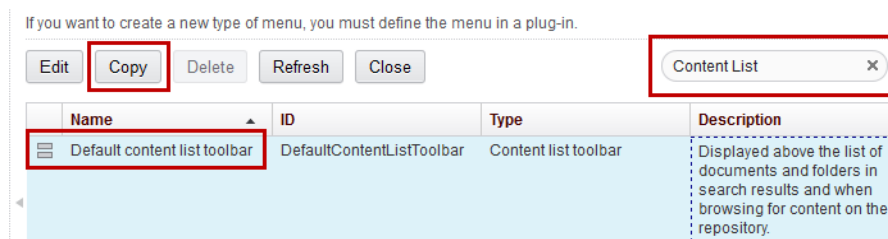
Notes:

This lesson describes to changes to the Content list toolbar.

- The widget associated with the Add Document toll bar option is exchanged for the new widget that includes the “Document from Scanner” option.
- The Scan Document control bypasses the what do you want to save option and takes you directly to the “Document from scanner”
- The New Add Document option still allows you to select “Local document”, “Information about document”, “Link to an external document”, in addition to the new “Document from scanner” option.

IBM Content Navigator Menus

- The IBM Content Navigator includes default menus.
 - You can copy a menu and customize it.
 - A custom menu must be associated with a desktop.
 - Customize the "Default content list toolbar"
- To include the direct scan option in Content Navigator.



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Figure 1-94. IBM Content Navigator Menus

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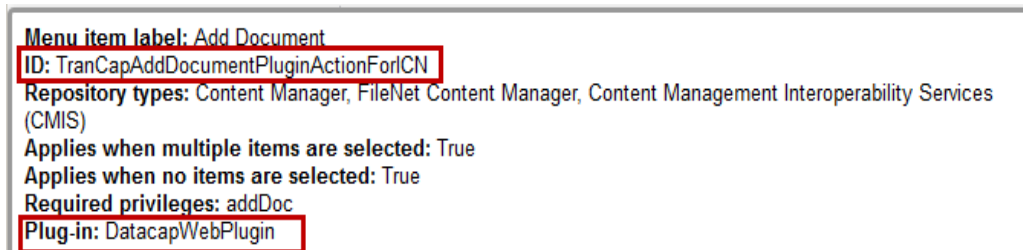
Notes:

The IBM Content Navigator includes default menus.

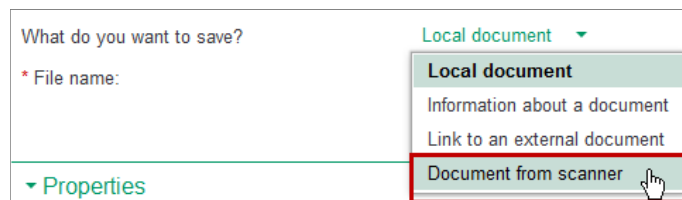
- In the Administration desktop, You can copy a menu and customize it to include or remove menu items for the menus.
- The custom menu that you create must be associated with the Content Navigator desktop to use the menu.
- For this exercise, you customize the "Default content list toolbar" to include the direct scan option in Content Navigator.

Add Document menu item with Scan option

–"Add Document" menu item that is part of the DatacapWebPlugin is required for the direct scan.



–The menu item provides the "Document from scanner" option in the "Add Document" wizard.



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Figure 1-95. Add Document menu item with Scan option

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Notes:

Two different "Add Document" menu items with different IDs are available in IBM Content Navigator.

1. The "Add Document" item with "ID: Import"

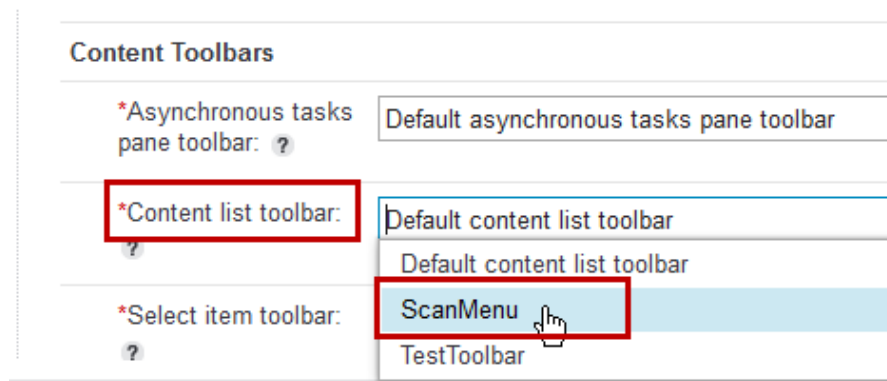
This menu item is native to IBM Content Navigator and does not have an option for direct scan.

2. The "Add Document" item with "ID: TranCapAddDocumentPluginActionForICN"

This menu item is added to IBM Content Navigator by registering the DatacapWebPlugin, and this menu has an option for direct scan.

Assign the new menu to a desktop

- Assign the new menu to a Content Navigator desktop.
 - Replace the default Content list toolbar menu with the new one.
 - The menu can be used after associating it with a desktop.



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Figure 1-96. Assign the new menu to a desktop

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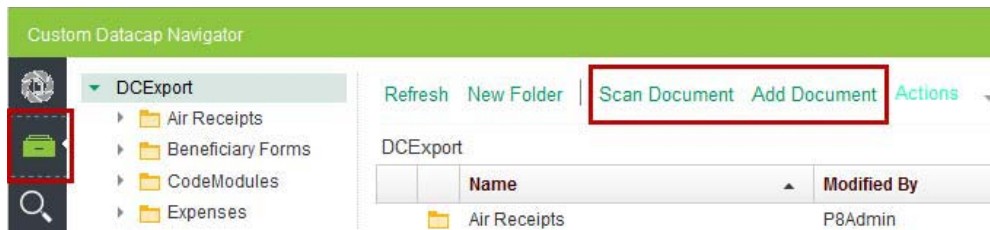
Notes:

Assign the new menu.

- You replace the existing default Content list toolbar menu for this desktop with the new one.
- Your custom menu becomes available only after associating it with the Content Navigator desktop.

Add Document and Scan Document menu items

- Add Document menu item.
 - The menu item is added to the toolbar in the Browse view.
 - A FileNet Content Manager repository is used as an example.
- You can also configure "Scan Document" menu item.



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Figure 1-97. Add Document and Scan Document menu items

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Notes:

Add Document and Scan Document menu items

- The menu item that you configured is added to the toolbar in the Browse view.
- A FileNet Content Manager repository is used as an example.
- You can also configure "Scan Document" menu item for your desktop.

Work with the Add Document wizard for scanning

- In the Browse view, click the “Add Document” menu item.
 - In the “What do you want to save” section, select “Document from scanner” option.
 - This option shows the Scanner section to scan a document.

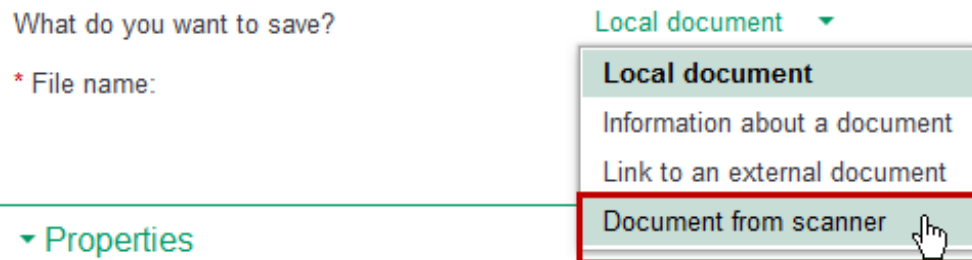


Figure 1-98. Work with the Add Document wizard for scanning

Notes:

Scan the document

- In the Scan section of the “Add Document” wizard, you scan the documents from a directory.
–Append, Insert, or Replace images.



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Figure 1-99. Scan the document

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Notes:

In the upcoming 9.0.1 version, this feature will be enhanced to

Automatic property population

- In the Datacap 9.0.1 version, the scan feature is enhanced:
– To capture data and populate the properties of a document class.

The screenshot displays the Datacap Navigator Configuration interface. On the left, a document titled "Airline #1" is shown, containing a table of flight data and fare information. On the right, a form for the "Flight" class is visible, with fields for Document Title, Vendor_Logo, Outbound_From, Outbound_To, Outbound_Date, Return_From, Return_To, and Return_Date. The "Capture" dropdown menu is highlighted, showing options for "Capture Current Page" and "Capture Whole Document".

Date	Flight	Departure	Arrival
24JUL10	15	New York/Newark (LWR)	San Francisco (SFO)
		11:00AM	2:19PM
28JUL10	22	San Francisco (SFO)	New York/Newark (LWR)
		7:30AM	3:51PM

FARE INFORMATION

Airfare:	760.27
Taxes:	64.56
Total:	824.83

Document Title: MyScannedDoc.tif

Vendor_Logo:

Outbound_From: New York/Newark (EWK)

Outbound_To: San Francisco (SFO)

Outbound_Date: 7/24/2010, 12:00 AM

Return_From: San Francisco (SFO)

Return_To: New York/Newark (EWK)

Return_Date: 7/28/2010, 12:00 AM

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Figure 1-100. Automatic property population

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Notes:

In the Datacap 9.0.1 version, the Transactional Capture features are enhanced. The scan feature is enhanced to capture data and populate the properties of a document class automatically before uploading to the repository.

Add to Batch

- Documents that are in a repository can be sent to a batch:
 - First modify the Default document context menu.
- Create a custom menu to activate Add to Batch option.
 - In to ICN Admin, copy the Default document context menu.
 - Add the “Add to Batch” option to the menu.
 - Add it after the “Check In” option.
- Activate the custom menu to the Datacap desktop.
 - Desktop > Datacap > Menus > Context Menus
 - For Document context menu, select your “Add to Batches” menu.

Notes:

In the Datacap 9.0.1 version, the scan feature is enhanced to allow documents that are uploaded a repository to be sent to a batch for processing.

Exercise: Transactional Capture

Requires:
Course Exercise Guide
Student system

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Figure 1-102. Exercise: Transactional Capture

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Notes:

Exercise objectives



- Configure Transactional Capture
- Configure the Datacap application profile
- Test the Transactional Capture configuration
 - Add Documents from Scanner
 - Capture Document Properties
 - Add to Batch

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Figure 1-103. Exercise objectives

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Notes:

Lesson 1.8. Install and Customize Datacap Navigator

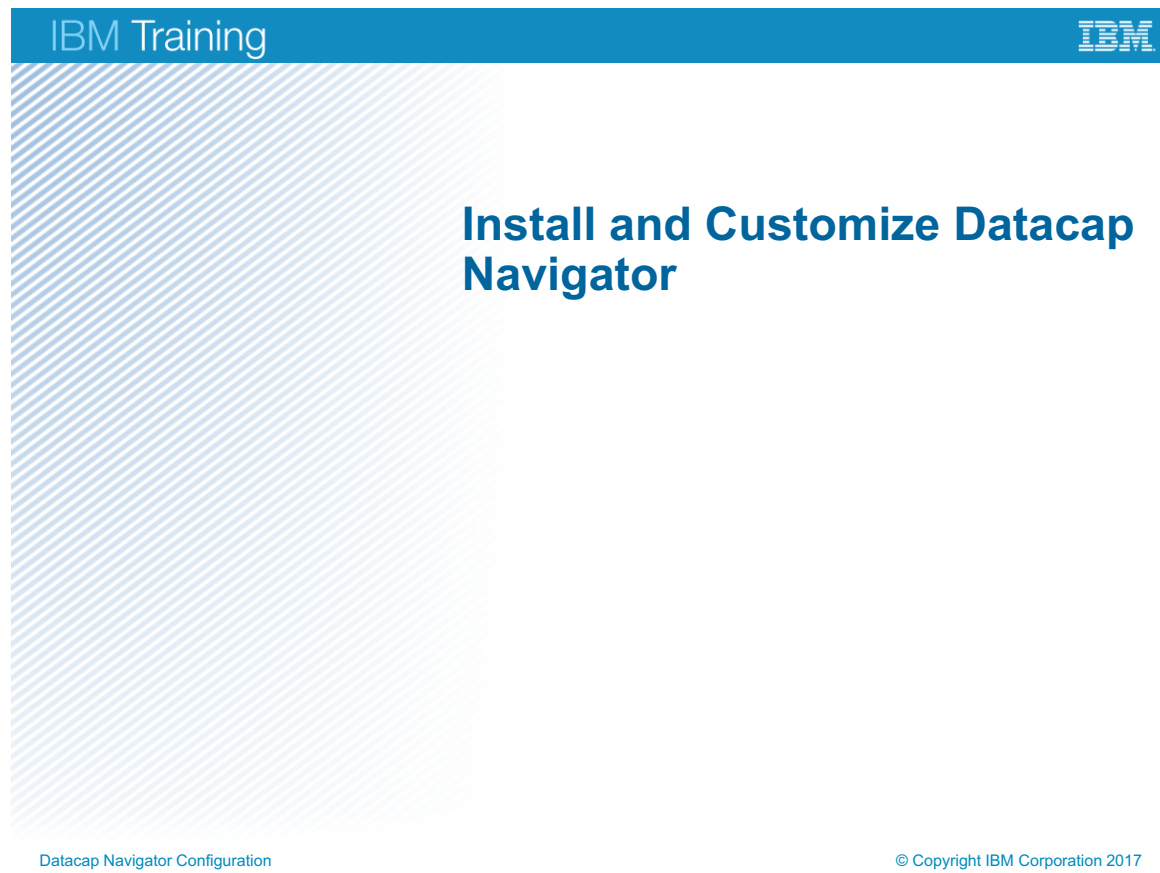


Figure 1-104. Install and Customize Datacap Navigator

F2571.0

Notes:

Topics

- Navigator Updates
- Change Datacap Navigator User Settings
- Configure Users and Groups
- Enable Rescan for the Verify task
- Create Custom Panels
- Implement External Data Services
- Transactional Capture
- ▶ Install and Customize Datacap Navigator

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Figure 1-105. Topics

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Notes:

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.

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Figure 1-106. Why is this lesson important to you?

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Notes:

Install Datacap Navigator as a plug-in

Plug-in: Datacap Navigator

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.

<input checked="" type="radio"/> JAR file path: ?	C:\Datacap\tmlweb.java\DatacapWebPlugin.jar	Load
<input type="radio"/> Class file path: ?		Load
Class name: ?		
Name:	Datacap Navigator	
Version:	Datacap 9.0_tm900.003.188	
Repository types:	Datacap Application	
Actions:	Delete, Refresh, Edit Batch, Edit Job, View History, Property, Start, Scan, Upload, Classify, Verify, Change User Settings, Previous Page, Run Validations, Next Page, Hold, Next Problem, Previous Problem, Submit, Abort, Cancel, Scan, Check Integrity, Next Low Confidence, Monitor, Task List, Select Pending, Add Document, Scan Document, Scan Document	
Open Actions:	None	
Viewers:	None	
Features:	Datacap Main Page, Datacap Admin Console	
Layouts:	None	
Default Application ?	TravelDocs	
Default Datacap wTM URI ?	http://ecmedu01:85/ServiceWTM.svc	
Generate Default Desktops		

Datacap Navigator Configuration

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Figure 1-107. Install Datacap Navigator as a plug-in

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Notes:

The screen capture shows the registration page for the Datacap Navigator plug-in.

Datacap Navigator plug-in JAR file

- When the plug-in is installed, it integrates with IBM Content Navigator.
- The IBM Content Navigator web application server must be able to access the plug-in file.
 - Enter the fully qualified path for the JAR file, if it is on your local file system.
The default path is: C:\Datacap\tmlweb.java\DatacapWebPlugin.jar
 - Enter the URL of the plug-in JAR file, if it is on a remote server.
- After you load the plug-in, information about the plug-in is shown.

Datacap Application Name

Enter a default Datacap Application name (Example: "TravelDocs").

When you access the Datacap Navigator application, you are authenticated against this application repository.

Datacap wTM URI

Enter the URL of Datacap wTM (Example: "http://ecmedu01:85/ServicewTM.svc").

Datacap Navigator desktops are created after you complete the registration of the plug-in.

Default Datacap Navigator Desktops created

- The plug-in installation creates four Datacap specific desktops in IBM Content Navigator:

Desktops

You can create multiple desktops to give different users access to the content they need. For example, you can create a desktop that only allows users to search for content or a desktop that gives users access to a single repository.

[New Desktop](#)
[Edit](#)
[Copy](#)
[Delete](#)
[Refresh](#)
[Export](#)
[Import](#)
[Close](#)

	Name	ID	Description
★	Admin Desktop	admin	Desktop for users with administrative privileges
	Datacap	datacap	Datacap Main Page
	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
	Datacap Admin Console	dcadmin	

Datacap Navigator Configuration

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Figure 1-108. Default Datacap Navigator Desktops created

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Notes:

The screen capture shows a list of Datacap Navigator desktops that the plug-in creates.

The Datacap Navigator plug-in installation creates the following four Datacap specific desktops in IBM Content Navigator:

1. “Datacap” that is the main page for the business users.
2. “Datacap Admin Console” for the administrators.
3. “Datacap Quick Launch Desktop” that contains Datacap Main feature and the quick launch pane.
4. “Datacap Advanced Desktop” that contains Datacap Main feature, quick launch pane, and shortcut pane.

You can customize the default desktops to add features and to include more Datacap Application repositories. In this course, you mainly use 1 and 2 desktops.

Configure a Repository for Datacap Applications

The screenshot shows the 'Repositories' tab in the IBM Content Navigator Configuration interface. A dropdown menu is open under 'New Repository', showing options: Content Manager, Content Manager OnDemand, FileNet Content Manager, Content Management Interoperability Services, and Datacap Application (which is selected). The main configuration window for 'ExpenseDemo' is displayed with the 'General' tab active. It contains the following fields:

- Display name:** ExpenseDemo
- ID:** ExpenseDemo
- Datacap wTm URI:** http://ecmedu01:85/ServicewTM.svc
- Application:** ExpenseDemo (selected from a dropdown)
- Default Station:** 1

A 'Connect...' button is located at the bottom of the configuration window. A message at the top of the configuration window states: 'You must connect to the repository before you configure parameters, system properties, folders, and so on.'

Datacap Navigator Configuration

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Figure 1-109. Configure a Repository for Datacap Applications

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Notes:

The screen capture shows the Datacap Application repository setup ("General" tab) in the Content Navigator admin page.

Steps to configure a repository for Datacap applications

1. In IBM Content Navigator Administration desktop, Select "Repositories" in the navigation pane.
2. In "Repositories" tab, select "New Repository" > "Datacap Application" from the list. This step sets the type of repository.
3. In "New Repository" tab, enter values for the following fields:
 - **Display name:** Specify the repository name to display to the users in the web client.
 - **ID:** This field is automatically populated based on the display name.
 - **Datacap wTm URI:** <http://ecmedu01:85/ServicewTM.svc>
 - **Application:** Expense Demo
 - **Default Station:** 1
4. Click Connect.

Configuration parameters for a repository

ExpenseDemo

General

Configuration Parameters

You can override the default behavior of this repository by setting the configuration parameters.

Select job attributes to include when listing jobs of this repository.

Name contains

Available Columns

Task Start

Job Stop

Batch Directory

Page File

Operator Skip

Station Skip

Priority



Add or remove a column

Selected Columns

Queue ID

Batch

Job

Task

Status

Job Start

Job Time

Operator

Station

Documents

Pages



Change the order

Datacap Navigator Configuration

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Figure 1-110. Configuration parameters for a repository

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Notes:

The screen capture shows the Datacap Application repository setup (“Configuration Parameters” tab) in the Content Navigator admin page.

Configuration parameters for a repository

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.

1. Add or remove a column to show in Datacap Navigator client Job Monitor:
 - In the IBM Content Navigator Administration desktop > “New Repository” tab > “Configuration Parameters” subtab, you can select what columns to display.
 - Move the items from the “Available Columns” pane to the “Selected Columns” pane to add a column.
 - Move the items from the “Selected Columns” pane to the “Available Columns” pane to remove a column.
2. Use the Up and Down arrows to change the order of the columns in the “Selected Columns” pane.

Default repository for authentication to Datacap Navigator

Desktop: **Datacap**

* General * Repositories * Layout Appearance *

* Name: ? Datacap

* ID: ? datacap

Description: Datacap Main Page

▼ Authentication

* Repository: TravelDocs

◀ Limit access to specific users and groups ☐ Enable ☒ Disable

Datacap Navigator Configuration

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Figure 1-111. Default repository for authentication to Datacap Navigator

F2571.0

Notes:

The screen capture shows the Datacap Navigator desktop setup (“General” tab) in the Content Navigator admin page.

Default repository for authentication to Datacap Navigator

In IBM Content Navigator Administration desktop, when you installed the plug-in, you specified a Datacap application name. As part of the installation, a repository (Datacap type) is configured and used as a default repository.

This default repository is used to authenticate to the Datacap Navigator client.

Add a Datacap Repository to Datacap Navigator desktop

Desktop: **Datacap**

• General

• **Repositories**

• Layout

Appearance

• Menus

Workflows

Mobile

Specify which repositories you want users to have access to from this desktop. You must configure your repositories before you can add them to the desktop.

Tip: You can limit which repositories are available for each feature when you configure the desktop layout.

Filter

Available Repositories

FastForm

LoanProcess

LoanProcessQA

P8ConfigObjectStore

Sales

SalesSBx

Add or remove a repository

Selected Repositories

TravelDocs

ExpenseDemo

Medical Claims

DCEExport

Change the order

Datacap Navigator Configuration

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Figure 1-112. Add a Datacap Repository to Datacap Navigator desktop

F2571.0

Notes:

The screen capture shows the Datacap Navigator desktop setup (“Repositories” tab) in the Content Navigator admin page.

Add a Datacap Repository to Datacap Navigator desktop

1. In IBM Content Navigator Administration desktop, select the desktop that you want to edit.
2. In the “Repositories” tab of the Datacap Navigator desktop, Add or remove a repository:
 - Move the items from the “Available Repositories” pane to the “Selected Repositories” pane to add a repository.
 - Move the items from the “Selected Repositories” pane to the “Available Repositories” pane to remove a repository.
3. Use the Up and Down arrows to change the order of the columns in the “Selected Columns” pane.

Add Browse and Search Features to Datacap Navigator

Desktop: **Datacap**

• General • Repositories • **Layout** Appearance • Menus Workflows Mobile

▼ Desktop Features

Specify which features users can access from this desktop. Additionally, you can customize the behavior of each feature that is included in the desktop.

* 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 checked="" type="checkbox"/>	Search
<input type="checkbox"/>	Home
<input type="checkbox"/>	Teamspace
<input type="checkbox"/>	Work
<input type="checkbox"/>	Entry Template Manager
<input type="checkbox"/>	Asynchronous Tasks
<input type="checkbox"/>	Datacap Admin Console

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

Tree view: ? ☒ Show ☐ Hide

Datacap Navigator Configuration

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Figure 1-113. Add Browse and Search Features to Datacap Navigator

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Notes:

The screen capture shows the Datacap Navigator desktop setup ("Layout" tab) in the Content Navigator admin page.

Configure the Browse and Search tabs in Datacap Navigator

1. In IBM Content Navigator Administration desktop, select the desktop that you want to edit.
2. In the "Layout" tab of the Datacap Navigator desktop, select the Browse feature:
 - i. Select a Default repository. Example: DCExport (FileNet Content Manager repository).
 - ii. For the "Repositories" field, select the repositories Example: DCExport (FileNet Content Manager repository).

Note: If you select the "Datacap Application" type repositories for Browse or search, it will through an error. They are not configured for document management.

3. Repeat the steps for the Search feature.

Change the name and theme for Datacap Navigator

Desktop: **Datacap**

• General • Repositories • Layout • **Appearance** • Menus

You can customize the appearance of the desktop by changing the login page and banner.

Application name: ? → Custom Datacap Navigator

Theme: ? →

- ☐ IBM
- ☒ Custom ?
 - malachite
 - azurite
 - cordierite
 - malachite**
 - obsidian
 - quartz

End user help URL: ?

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Figure 1-114. Change the name and theme for Datacap Navigator

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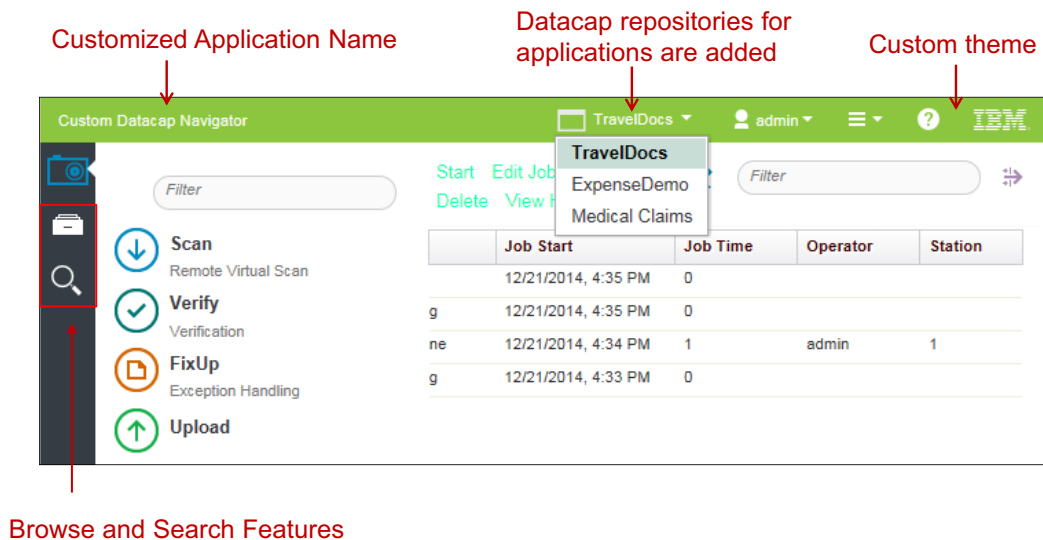
Notes:

The screen capture shows the Datacap Navigator desktop setup (“Appearance” tab) in the Content Navigator admin page.

Change the name and theme for Datacap Navigator

1. In IBM Content Navigator Administration desktop, select the desktop that you want to edit.
2. In the “Appearance” tab of the Datacap Navigator desktop:
 - Enter a customized Application Name to show it on the banner of the Datacap Navigator.
 - For the Theme field, select the “Custom” option and then select a theme. Example: Malachite.
3. Save the changes.

Customized Datacap Navigator desktop



Datacap Navigator Configuration

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Figure 1-115. Customized Datacap Navigator desktop

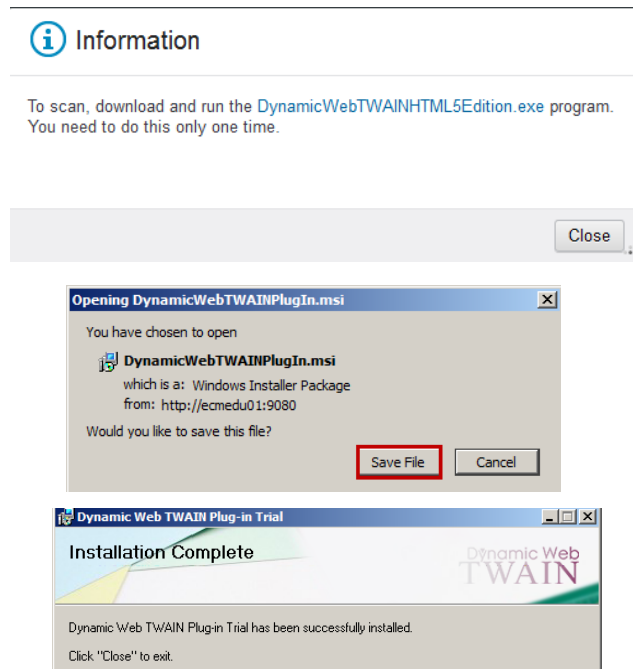
F2571.0

Notes:

The screen capture shows an example of a customized Datacap Navigator desktop.

- The banner has green color to reflect the “malachite” custom theme that you selected.
- The application name on the banner has a custom name that you provided.
- All the “Datacap Application” type repositories that you configured are listed on the banner. You can select an application to work on.
- “Browse” and “Search” Content Management features of the IBM Content Navigator are included in your custom Datacap Navigator desktop.

Configure the Datacap Navigator for scanning



Datacap Navigator Configuration

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Figure 1-116. Configure the Datacap Navigator for scanning

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Notes:

Help path

IBM Datacap 9.0.1>Installing and configuring in a client/server environment>Datacap installation and configuration in a client/server environment>Installing and configuring Datacap Navigator>Configuring Internet Explorer for TWAIN scanning in Datacap Navigator

http://www.ibm.com/support/knowledgecenter/SSZRWV_9.0.1/com.ibm.dc.install.doc/dcnvi007.htm?lang=en

The screen capture shows the Datacap Navigator configuration for scanning.

One time configuration for the Datacap Navigator for scanning

- You can enable Web TWAIN scanning and document import in Google Chrome and Mozilla Firefox browsers by installing Web TWAIN.
- You are prompted to download and install a service component the first time when you attempt to scan in Datacap Navigator.

- By default, Microsoft Internet Explorer uses ActiveX for TWAIN scanning and document import. ActiveX is configured manually or by running the Web Client Configuration Tool. Web TWAIN scanning is more secure than using ActiveX.
- You can configure Internet Explorer versions 10 and 11 to use Web TWAIN scanning instead of ActiveX for TWAIN scanning.

Demonstrations

- Configure Datacap repositories

Datacap Navigator Configuration

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Figure 1-117. Demonstrations

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Notes:

If you are taking this course as a self-paced virtual course, return to the main course menu to play the pre-recorded demonstrations.

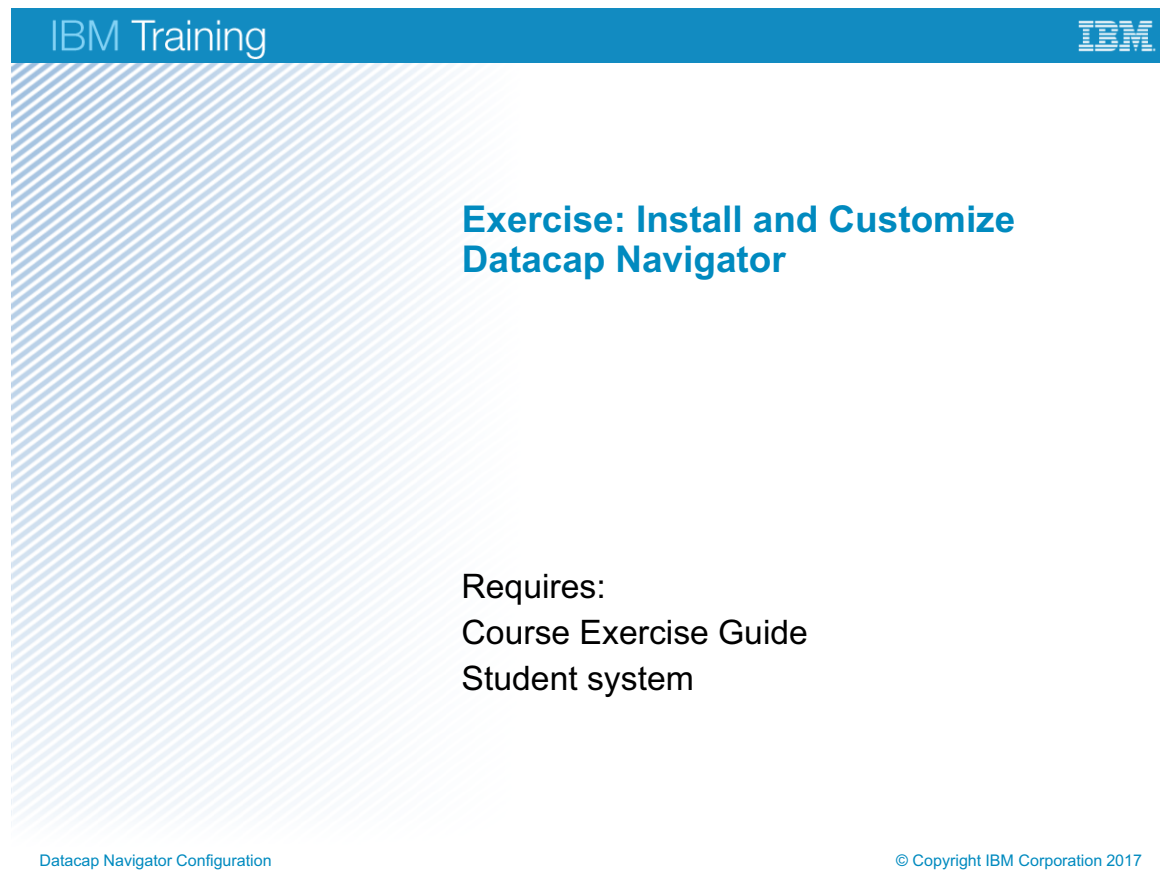


Figure 1-118. Exercise: Install and Customize Datacap Navigator

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Notes:

Exercise objectives

- Install Datacap Navigator as a plug-in.
- Customize the Datacap Navigator desktops.



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Figure 1-119. Exercise objectives

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Notes:

Unit summary

- Enable Datacap Navigator Single Sign On
- Change Datacap Navigator User Settings
- Create users and groups
- Enable Rescan for the Verify task
- Create a custom panel for a task
- Implement external data services for Datacap Navigator
- Transactional Capture
- Install Datacap Navigator as a plug-in
- Customize the Datacap Navigator desktops

Datacap Navigator Configuration

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Figure 1-120. Unit summary

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Notes:



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