IBM

Course Exercises Guide

IBM Datacap 9.0.1: FastDoc Local Mode

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Unit 1. FastDoc local mode

Estimated time

04:00

Unit overview

This unit contains these lessons.

Lessons

Requirements

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

Do this first

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

Type	User ID	Password
Operating system	Administrator	passw0rd

2. Start the Datacap Server.

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

    The Datacap Server Manager window is shown.

    b. Click the Service tab.

    c. Click Start to start the The Datacap Taskmaster Server Service if it is not already started. The Start operation is disabled if it is already started.

    d. Click Close to close the Datacap Server Manager window.

3. Start WebSphere Application Server.

    a. Double-click the WebSphere Admin folder on the Desktop.

    b.   Double-click the Start Server1.bat script file.

        This action starts the IBM FileNet Content Manager, and the Content Navigator.

System check

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

Use procedures in Appendix A to check the following components:

1. IBM FileNet Content Platform Engine

   Procedure 2, "Check the Content Engine," on page A-3

2. IBM Content Navigator

   Procedure 5, "Check the IBM Content Navigator," on page A-4

3. IBM Datacap Content Navigator

   Procedure 6, "Check the Datacap Components," on page A-4

4. See Appendix A for additional procedures to Start, Check, and Restart components on the Student system.

Lesson 1.1. FastDoc overview

Overview

Why is this lesson important to you?

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

This lesson gives you a broad overview of the capabilities of the FastDoc as a rapid development tool and as a user client.

Activities

Exercise 1: FastDoc: Quiz, on page 1-4

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Note

Passwords are always case-sensitive.

Exercise 1: FastDoc: Quiz

For each of the following statements, indicate whether the statement is accurate by marking it True or False.

1. Using one of Datacap's built-in application templates, FastDoc can be used as rapid development tool.

   True or False

2. FastDoc has two operation modes. The modes are Local mode and Datacap Server mode.

   True or False

3. To use the Datacap Server mode, you must log in to FastDoc with the Admin interface and configure Batch and Task profiles before proceeding with batch processing.

   True or False

4. To use the FastDoc Datacap Server mode, you must log in to FastDoc with either the Admin or user interface and select the application that you want to use to process document batches.

   True or False

5. To use the FastDoc Local mode, you must log in to FastDoc with the Admin interface and configure Batch and Task profiles before proceeding with batch processing.

   True or False

6. FastDoc Local mode can be used only to scan batches and then upload them to the taskmaster server for further processing.

   True or False

7. If FastDoc Local mode is used, then all processing up to the Export Task must be done locally and then the batch is uploaded to the Datacap server to complete the Export Step.

   True or False

8. Any portion of the processing can be done in the Local mode. When the batch is uploaded, then processing is completed with FastDoc in the Datacap Server mode, with Datacap Desktop, or Rulerunner Service.

   True or False

9. FastDoc can be used as an integrated user interface to run all tasks for any existing application with the Datacap Server mode.

   True or False

✎ Note

The answers for these questions are in the Unit 1 Appendix after Lesson 5.

End of exercise

Lesson 1.2. FastDoc Local mode

Overview

Why is this lesson important to you?

As a Datacap business analyst, you might be required to configure FastDoc to process batches completely or partially on the local system before uploading the batches to the server for further processing.

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

Activities

Exercise 1: Explore FastDoc Local mode, on page 1-6

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Note

Passwords are always case-sensitive.

Exercise 1: Explore FastDoc Local mode

Introduction

This activity demonstrates opening FastDoc in the local mode and viewing the configuration and processing capabilities.

Procedures

Procedure 1, "View FastDoc local capabilities," on page 1-6

Procedure 1: View FastDoc local capabilities

1. Log in to FastDoc (Admin) in Local mode.

   a. Click Start > All Programs > IBM Datacap Developer Tools > Datacap FastDoc (Admin)

   b. Start Datacap FastDoc (Admin)

   c. Select Local on the Welcome to Datacap window.

   d. Click Login.

2. View Batch Profile shortcuts.

    You are viewing the Process Batches view.

   a. Notice that there are two shortcuts below the New Batches title.

      - TravelDocs is configured to process a batch through all steps from Scan to Export at the Local level.

      - Send TravelDocs to Datacap is configured to scan a batch and then immediately upload it to the server for further processing.

   b. If there are any batches that are partially completed for either of the defined batch profiles, they would appear as active batches in the Existing Batch Folders.

   c. If there are any batches that are completed for either of the defined batch profiles, they would appear as finished batches in the Existing Batch Folders.

   d. With the Purge Finished Batches option, you can purge the batch folders for finished batches and reset the counters to zero. This action deletes all finished batches in all defined batch profiles.

   e. With the Delete Selected Batches option, you can select a specific batch and delete the batch folder for the selected batch. The active batches count is adjusted to reflect the remaining active batches.

3. View document configuration options.

   a. Click the Configure local profiles icon .

      Notice the following areas of the Configure local profiles view.

      - Batch Profiles pane - the two defined batch profiles are listed in the left pane under the Batch Profiles title.

- Batch Profile controls - on the title bar to the right of the Batch Profiles title are controls for:

  ○ Adding a Batch Profile.

  ○ Saving the batch profile configuration changes.

  ○ Removing an existing batch profile.

- Batch Profile properties pane - holds the batch profiles configurable parameters.

- Tasks Pane - configure the batch profile tasks.

b. Click the TravelDocs batch profile.

c. Click each of the defined tasks in the tasks pane and the notice how parameters and options are configured:

- The Task Name field matches the tab name at the top of the pane.

- Notice the Task option selections for each task.

- Notice that the Application field is set to the application that these tasks are connected to.

- Notice that the Workflow name matches the Type field in the Batch Profile Name pane, which must in turn match the Batch structure or DCO structure name.

d. Click the Export task.

e. Click the < in the upper right corner of the tasks pane. You might have to maximize the window or scroll to the right to see + - < > controls

Notice that the order of the tasks is changed.

f. Click > to restore the correct order.

g. Click + and notice that a new task is created.

h. Experiment with defining task options if you want.

i. Click - to delete the new task.

j. Click OK to confirm task deletion.

Note. The order of the tasks is important. When you initiate a batch, the tasks are run in the order defined. Processing stops only when an operator intervention is required. For example, at the Verify step.

4. Log out of FastDoc.

a. Click Administrator.

b. Click Logout.

c. Close the FastDoc login window.

End of exercise

Lesson 1.3. Create local capture batch

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. You might be called on to configure remote site for scanning and uploading document batches to the Datacap Server.

To do this operation, you must be familiar with using the FastDoc user interface in the local run mode to capture documents of a known type.

Activities

Exercise 1: Configure a local batch, on page 1-9

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Note

Passwords are always case-sensitive.

Exercise 1: Configure a local batch

Introduction

In this exercise, you create a local batch that has four local tasks corresponding to the application task profiles, Scan, Profiler, Verify, and Export. These activities are done on the FastDoc workstation with the FastDoc (Admin) Local interface.

Scenario

You have the FastDoc application that is created on Datacap 8.1 and imported to the Datacap 9.0 system. The application is configured to recognize three document types. It is configured with the four standard task profiles, Scan, Profiler, Verify, and Export.

You need to configure a local batch that defines local tasks for each task profile and runs them in the normal order as stated in the previous paragraph.

Procedures

Procedure 1, "Add the Expenses batch," on page 1-9

Procedure 1: Add the Expenses batch

Use the Expenses data table and procedure1 - 3 and configure a Local batch. The Local batch scans and then processes a document batch through all four tasks in the offline mode. It does not upload the results to the Datacap server for further processing but exports directly to FileNet Content Manager repository.

Expenses Data

Item	Name	Parameters
Batch Profile Name	Expenses	
Type	Expenses	
Task Name	**Scan**	
Task option	Disk Scan	Application: ExpenseDemo Workflow: ExpenseDemo Task Profile: VScan
Task option	Start Batch Panel	Application: ExpenseDemo Workflow: ExpenseDemo
Task Name	**Profiler**	
Task option	Rulerunner	Application: ExpenseDemo Workflow: ExpenseDemo Task Profile: Profiler
Task Name	**Verify**	
Task option	Verify	Application: ExpenseDemo Workflow: ExpenseDemo Task Profile: Verify
Task Name	**Export**	

| Task option | Rulerunner | Application: ExpenseDemo
Workflow: ExpenseDemo
Task Profile: Export |

This procedure provides the steps for adding a new Local Batch name and four tasks. The Batch does a Disk Scan followed by running Profiler, Verify, and Export tasks.

1. Add a Batch Profile.

   a. Start Datacap FastDoc (Admin), click Local and then click Login.

   b. Click the "Config local profile" icon on the mode select pane.

   c. Click Add on the Batch Profiles controls bar.

   d. Type the Batch Profile Name. Example Expenses.

   e. Type the batch Type. Example Expenses. This name must match the Batch Structure name from FastDoc Batch structure configuration or Batch type from the DCO pane of Datacap Studio.

2. Add the Scan Task.

   a. In the Task pane, type the Task Name. Example Scan.

3. Configure the Scan Task options.

   See the Disk Scan options in the Expenses Data table.

   a. Select the Disk Scan option in the Task Options pane.

   b. Select ExpenseDemo from the Application list.

   c. Select ExpenseDemo from the Workflow list.

   d. Select VScan from the Task Profile list.

4. Click + in the upper right corner to add a task then repeat steps 2a - 3d with the data in the Expenses Data table to configure the other three local tasks.

5. Add a Start Batch Panel to the Scan Task.

   a. Click the Scan task tab.

   b. Select the "Start Batch Panel" in the Task options pane.

   c. Select ExpenseDemo for the Application and Workflow fields.

6. Save your changes.

   a. Click Save on the Batch Profiles control bar.

7. Log out of FastDoc.

   a. Click Administrator and select Logout.

   b. Close the FastDoc login window.

8. You use the Expense batch in the next activity to process a document batch offline.

End of exercise

Lesson 1.4. Process Local batches

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. You might be called on to configure remote site for scanning and uploading document batches to the Datacap Server.

To do this operation, you must be familiar with using the FastDoc user interface in the local run mode to capture documents of a known type.

Activities

Exercise 1: Process documents in local mode, on page 1-12

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Note

Passwords are always case-sensitive.

Exercise 1: Process documents in local mode

Introduction

In this exercise, you use a FastDoc application that was configured and installed on the class image to demonstrate FastDoc local mode of operation.

Scenario

You have a FastDoc application that is named ExpenseDemo that is configured to process three document types. You will only use one of these document types in this exercise. You are required to demonstrate to users how to use the FastDoc (User) interface in the Local mode to process a batch of the three document of the same types to see how the FastDoc interface works.

Procedures

Procedure 1: Scan the Documents

1. Start Datacap FastDoc user interface

   a. Double-clicking the Datacap FastDoc desktop icon. You are prompted to log in.

2. Click Local and then click Login.

3. Click the Expenses link below the New Batch heading.

   The screen changes to display the FastDoc scanning user interface.

4. Click SCAN in the Disk Scan pane.

5. Browse to C:\DC9-Lab Exercises\Expense\All-Images\HR Images with Receipts.

6. Click PGerety1.tif then Shift and click PSanderson3.tif.

7. Click Open.

 Note

If you use a physical scanner, the paper would feed through the scanner. FastDoc supports both Twain and ISIS scanners.

Observations

The seven images are loaded into the system.

Look at the thumbnail strip at the bottom of the screen, the seven images are listed here.

Click each thumbnail to view the images that were scanned:

The first four images belong together in a four-page document.

1. Humanitarian Relief Fund Donor information form for Paul Gerety.

2. A donation receipt for Paul Gerety for $100.

3. A donation receipt for Paul Gerety for $100.

4. A donation receipt for Paul Gerety for $100.

   The next three images are a three-page document.

1. Humanitarian Relief Fund Donor information form for Pamela Sanderson.

2. A donation receipt for Pamela Sanderson for $1000.

3. A donation receipt for Pamela Sanderson for $1000.

Procedure 2: Process the documents

1. Click Submit to start processing the scanned documents.

   FastDoc does all of the defined Profiler task processing.

   Observe the screen while FastDoc processes the images.

   It takes several seconds per page. The speed depends on the power of the processing system. The phases of processing are: Image Clean, CreateDocs, and ChkConfig.

Procedure 3: Verifying the documents

When processing is complete:

- The pages are grouped into documents and the first page of each document is larger than the others.

- The first document is identified as an HR document in the Verify panel. The Document heading on the image is Humanitarian Relief Fund.

- The extracted properties are displayed on the verify/data entry screen.

1. Verify that the flagged fields are correct by comparing the extracted values against the Image.

2. Click the Next Problem icon.

3. You might have to expand the size of the Verify pane to see the Next Problem icon.

   ▪ You might see the frequency field displayed with a yellow background. This indicates that the confidence level did not meet the threshold and therefore should be checked by the verifier. If you compare it against the image and the value looks correct, then click the Next Problem icon again.

   ▪ There should be no problems with this selection of documents, FastDoc starts the Export procedure.

4. The system completes the batch of images and returns to the starting screen. Close the FastDoc application.

5. Log out and close the FastDoc window.

Procedure 4: Observe the output and results

When FastDoc is run in the Local - Offline mode, output is placed in the local system folder at the following location: C:\Datacap\FastDoc\batches\<Batch name>\<Batch folder name>

For this exercise:

▪ Batch name is Expenses.

▪ The Batch ID Format defines the Batch folder name that is defined on the settings page for the ExpenseDemo application.

Batch ID Format

[c][Y][m][d].[n3]

ECMEDU0120150102.000
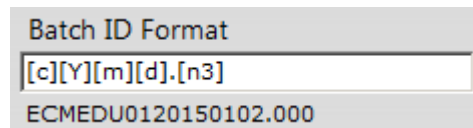
1. Open an Explorer browser and go to the batches folder:

   C:\Datacap\FastDoc\batches\Expenses\ecmedu01<date time.00x>
   Notice:
   ▪ There are task-specific files .xml, .log, and _rrs.log for each of the tasks that FastDoc runs.

      Tasks are: Scan, Profiler, Verify, Export.

   ▪ There are image-specific files: .cco, .tif, tio, .txt, .xml, and c.xml for each of the seven images pages in the batch.
   ▪ Depending on the document configuration, there is either a .tif or .pdf export image file for each processed document.
   ▪ For this configuration and selection of scanned images, there are two pdf documents generated. One is a four page document. One is a three page document. Open each document, observe the content and close the documents.

ExportFiles
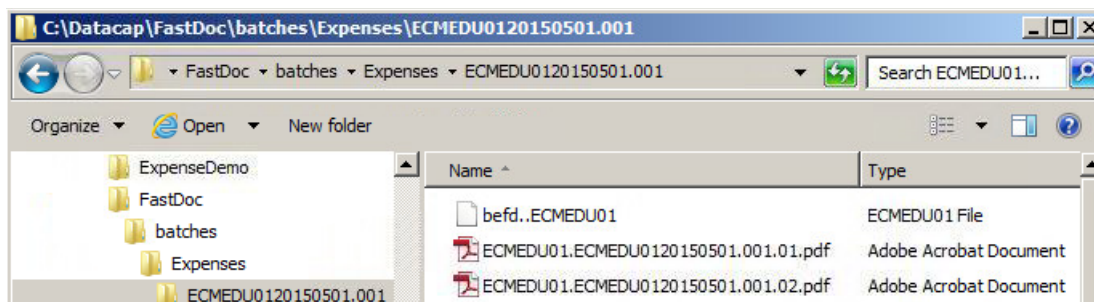
2. Close Windows Explorer.

End of exercise

Lesson 1.5. Configure scan and upload

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. You might be called on to configure a remote site for scanning and uploading document batches to the Datacap Server.

To do this operation, you must be familiar with using the FastDoc user interface in the local run mode to capture documents of a known type. You must also know how to configure an Upload shortcut with FastDoc.

Activities

Exercise 1: Configure a scan and upload task, on page 1-17

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin

Note

Passwords are always case-sensitive.

Exercise 1: Configure a scan and upload task

Introduction

In this exercise, you create a Scan and Upload task to upload the batch after scanning. Profiler, Verify, and Export tasks are done on the server with the FastDoc Datacap Server interface.

Scenario

You have the FastDoc application that is used in the last exercise, which is configured to process all of the data capture tasks offline.

You need to preserve the ability to still process all steps offline. You also need to add the ability to uploading the batch at the end of the Scan task so that the rest of the tasks can be run on the Datacap server.

Procedures

Procedure 1, "Add the ExpensesUpload batch," on page 1-17

Procedure 2, "Process a batch," on page 1-19

Procedure 1: Add the ExpensesUpload batch

Use the ExpensesUpload data table and procedure1 and 2 and configure a Local task. The Local task scans and uploads a batch to the Datacap server for further processing.

Data ExpensesUpload

Item	Name	Parameters
Batch Profile Name	ExpensesUpload	
Type	Expenses	
Task Name	**ScanUpload**	
Task option	Disk Scan	Application: ExpenseDemo
		Workflow: ExpenseDemo
		Task Profile: VScan
Task option	Send to Datacap	Application: ExpenseDemo
		Job: Main Job
		Statistics Table: taskstats
	Login	Batch Folder type:
		C:\Datacap\ExpenseDemo\batches
		Select Application: ExpenseDemo
		Type Password: admin
Task option	Start Batch Panel	Application: ExpenseDemo
		Workflow: ExpenseDemo

This procedure provides the steps for adding a new local batch name and an upload task. The task does a Disk Scan followed by a Send to Datacap operation.

1. Add a Batch Profile.

    a. Start Datacap FastDoc (Admin).

    b.   Select Local and click Login.

    c.   Click the "Config local profile" icon on the mode select pane.

    d.   Click Add on the Batch Profiles controls bar.

    e.   Type the Batch Profile Name. Example: ExpensesUpload.

    f.   Type the batch Type. Example: Expenses. This name must match the Batch type from the DCO pane of Datacap Studio.

2. Add the Upload Task.

    a.   In the Task pane, type the Task Name. Example ScanUpload.

3. Configure the Scan Task options.

      See the Disk Scan options in the ExpensesUpload table.

    a.   Select the Disk Scan option in the Task Options pane.

    b.   Select ExpenseDemo from the Application list.

    c.   Select ExpenseDemo from the Workflow list.

    d.   Select VScan from the Task Profile list.

4. Configure the Send to Datacap Task options.

      See the Send to Datacap options in the ExpensesUpload table.

    a.   Click the "Send to Datacap" Task option in the Task Options pane.

        You are prompted to log in to the application that you upload to.

       - Select "ExpenseDemo" for the application
       - Type the password `admin`
       - Click Login.

    b.   Click the "Send to Datacap" Task Option again and make the check box is set.

    c.   For "Application", select "ExpenseDemo".

    d.   For "Job", select "Main Job".

    e.   For "Statistic Table", select "taskstats".

    f.   Leave the Batch Folder property blank. The default Batch Folder as the Data ExpenseUpload table sample reveals has the format:

        \\<*datacap server*>\Datacap\<*application name*>\batches.

        To Specify a different location, type the folder path in the Batch Folder property.

5. Configure the Start Batch Panel Task options.

      See the Start Batch Panel options in the ExpensesUpload table.

    a.   Scroll down the options and select the Start Batch Panel option in the Task Options pane.

    b.   Select the correct Application and Workflow. Example ExpenseDemo

6. Save your changes.

    a.   Click Save on the Batch Profiles control bar.

7. Log out and close the FastDoc window.

Procedure 2: Process a batch

1. Scan and Send to Datacap in Local Mode

   a. Open FastDoc by double-clicking Datacap FastDoc icon on the desktop.

   b. Click Local and click Login.

   c. Click ExpensesUpload.

   d. Click Scan

   e. Browse to C:\DC9-Lab Exercises\Expense\All-Images\HR Images with Receipts.

   f. Click the PGerety1.tif image then press shift and click PSanderson3.tif image.

   g. Click Open and wait for the scanned images to appear in the image icon strip at the bottom of the window.

   h. Click Submit. If you are prompted to log in, log in with admin/admin.

2. Logout of FastDoc Local mode.

   a. Click logged in user icon Administrator and select Logout.

3. Verify that a batch with seven images was created.

   a. Open Windows Explorer and browse to:

      C:\Datacap\ExpenseDemo\batches.

   b. Open the newest batch folder.

   c. Verify that you see:

      ScanUpload.xml.
      ScanUpload.log.
      vscan_rrs.log.
      Seven .tif image files.

4. Log in to FastDoc user interface in the Datacap Server mode.

   a. Click the Datacap Server mode.

   b. Complete login option:

      - Select Application: ExpenseDemo
      - Type User: admin
      - Type Password: admin
      - Type Station: 1

   c. Click Login.

5. Run the Profiler Task in Datacap Server mode.

   a. Click the Profiler Shortcut.

      If there are any batches pending at the Profiler step, you can process them immediately by clicking the "Pending" icon.

      Note: One pending task is processed each time you click Pending.

      If there are any batches on hold, they are listed on the "All" shortcut page. To run the batches in the hold list, double click the one you want to run.

  b. Click Pending to process the batch that you created.

      Notice that the Profiler task progress messages. Examples: Cleaning the Images, Recognizing Page 1 of n, Locating the data, and Populating fields.

6. Verify the Batch in Datacap Server Mode.

  a. Click the Verify/Fix Shortcut.

      Note: There is one sample batch in the hold state listed on the Verify page. Do not process it.

  b. Click the "Pending" icon to process your batch.

      The system identified the document type and extracted the data from the image into the data entry pane. FastDoc displays the verification screen where you can check the results of the processing.

      Notice: The frequency field has a yellow background. This color is used to mark fields with low confidence recognition.

  c. Click the Go to Next Problem.

      The Verify task processing is completed and control returns to the shortcuts window.

7. Run the Export Task in Datacap Server Mode.

      The Export page processes one batch each time you click the Export Shortcut if there are export batches pending. There is no Pending button and export batches in the hold state are not listed on the Export page.

  a. Click Export Shortcut.

  b. Wait for the Export process to complete.

  c. Logout and close the FastDoc window.

8. Observe the batch folder contents.

  a. Open Windows Explorer and browse to the folder: C:\Datacap\ExpenseDemo\batches\<date>.00000y

  b. Double-click one of the pdf file that the rules created.

      C:\Datacap\ExpenseDemo\batches\<server><date>.00000y.0x.pdf

  c. Verify that there are two pdf documents generated. One is a four page document. One is a three page document. Open each document, observe the content and close the documents.

  d. Close Windows Explorer when you are done.

End of exercise

Appendix 1.   Answer keys to quizzes

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

Lesson 1.1. FastDoc: Quiz

For each of the following statements, indicate whether the statement is accurate by marking it True or False.

1. Using one of Datacap's built-in application templates, FastDoc can be used as rapid development tool.

    True or False Answer = True

2. FastDoc has two operation modes. The modes are Local mode and Datacap Server mode.

    True or False Answer = True

3. To use the Datacap Server mode, you must log in to FastDoc with the Admin interface and configure Batch and Task profiles before proceeding with batch processing.

    True or False Answer = False

4. To use the FastDoc Datacap Server mode, you must log in to FastDoc with either the Admin or user interface and select the application that you want to use to process document batches.

    True or False Answer = True

5. To use the FastDoc Local mode, you must log in to FastDoc with the Admin interface and configure Batch and Task profiles before proceeding with batch processing.

    True or False Answer = True

6. FastDoc Local mode can be used only to scan batches and then upload them to the taskmaster server for further processing.

    True or False Answer = False

7. If FastDoc Local mode is used, then all processing up to the Export Task must be done locally and then the batch is uploaded to the Datacap server to complete the Export Step.

    True or False Answer = False

8. Any portion of the processing can be done in the Local mode. When the batch is uploaded, then processing is completed with FastDoc in the Datacap Server mode, with Datacap Desktop, or Rulerunner Service.

    True or False Answer = True

9. FastDoc can be used as an integrated user interface to run all tasks for any existing application with the Datacap Server mode.

    True or False Answer = True

End of exercise

Appendix A. System Check for Your Student System

Appendix overview

This appendix contains the following activities.

Activities

System Components

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

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

Start student system components

Procedures

Procedure 1: Start student system components

1. Start your Server 2008 system:

   a. Log in as `administrator` user (password: `passw0rd`)

2. Start the WebSphere hosted system components.

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

   Start the WebSphere components by running the start script.

   a. From the image desktop, double-click the `WebSphere Admin Folder`.

   b. Double-click the Start Server1.bat script.

   c. A Windows command window opens while the script is running. Wait for the command window to close, which signifies that the WebSphere components are started.

      The start process can take several minutes.

   d. The Terminal window closes when the services started.

---

i **Information**

The following components are hosted on WebSphere Server1:

- DatacapEDSService
- FileNetEngine
- IBM Content Navigator

Procedure 2: Start Datacap Server

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

   The Taskmaster Server Manager window is shown.

2. Click the Service tab.

3. Click the Start icon ▶ to start the The Datacap Taskmaster Server Service if it is not already started. The Start operation is disabled if it is already started.

4. Click Close to close the Taskmaster Server Manager window.

Check the WebSphere Application Server

Procedures

Procedure 1: Check the WebSphere Application Server

1. On your image desktop, double-click the WebSphere Admin folder if it is not already open.

2. Double-click the Administrative console server1 shortcut to go to the WebSphere login window at `https://ecmedu01:9043/ibm/console/logon.jsp`.

3. Log in as `p8admin` user with `IBMFileNetP8` as the password.

   If the WebSphere server is running, the page shows the Integrated Solution Console.

   a. Log out of the Integrated Solutions Console.

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

5. Leave the browser open for the next procedure.

Procedure 2: Check the Content Engine

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

   a. if prompted, log in as User: `p8admin` Password: `IBMFileNetP8`

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

Key	
Product Name	P8 Content Platform Engine - 5.2.1
Build Version	dap521.234
Operating System	Windows Server 2008 R2 6.1

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

Procedure 3: Check the Process Engine

1. In the Internet Explorer browser click `Bookmarks > PE Server-Ping or` enter the following URL: `http://ecmedu01:9080/peengine/IOR/ping.`

2. Log in as `p8admin` with password `IBMFileNetP8`.

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

   .

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

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

Procedure 4: Check the Administration Console

1. In the Internet Explorer browser click the ACCE-CPE shortcut or enter the following URL: `http://ecmedu01:9080/acce`

2. Log in as `p8admin` with password `IBMFileNetP8.`

3. The Administrative Console for Content Platform Engine is running if the Browse page opens. The page shows a list of Object Stores.

4. If Administrative Console for Content Platform Engine does not open, start it as directed in the procedure Start student system components, on page A-2.

Procedure 5: Check the IBM Content Navigator

1. In the Internet Explorer browser click the ICN-ADMIN shortcut or enter the following URL: `http://ecmedu01:9080/navigator`

2. Log in as `p8admin` with password `IBMFileNetP8.`

3. The IBM Content Navigator is running if you get the IBM Content Navigator page.

4. If IBM Content Navigator does not open, start it as directed in the procedure Start student system components, on page A-2.

Procedure 6: Check the Datacap Components

1. Check Datacap Navigator.

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

    b. Log in as `admin` with password `admin`

    c. The Datacap Navigator is running if the Datacap Navigator page opens.

2. Check the tmweb client.

    a. In the Internet Explorer browser click the tmweb shortcut or enter the following URL:
   `http://ecmedu01/tmweb.net`

    Select the TravelDocs Application.

    User ID: `admin`

    Password: `admin`

    Station: 1

    b. Click Login.

    c. The tmweb page opens showing the Operations tab view.
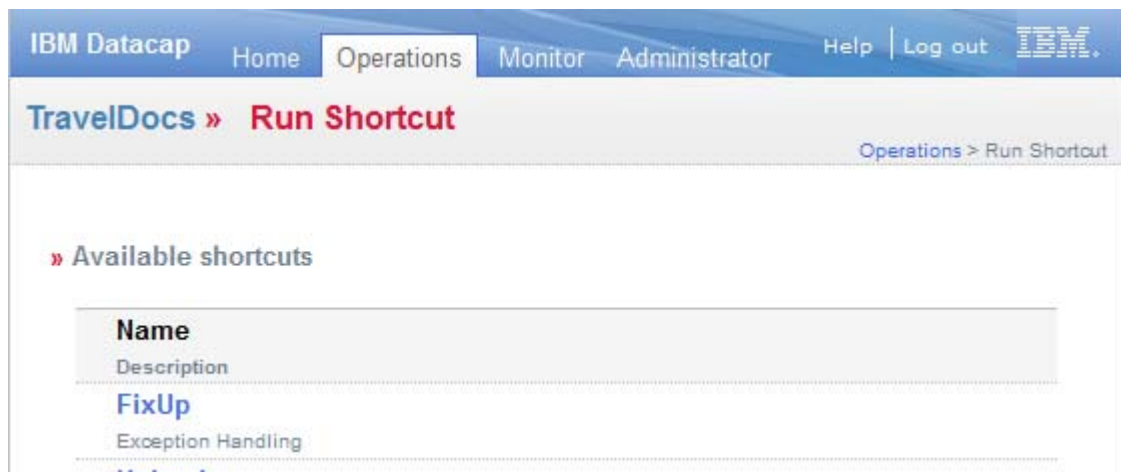
    d. If the login fails, it is possible that the Datacap Server Service was not started.

    e. Click log out and close the explorer window.

Restart the student system

Procedures

Procedure 1: Restart the student system (if needed)

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

1. Stop the WebSphere hosted system components.

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

   a. On the desktop, double-click the `WebSphere Admin Folder`.

   b. Double-click the StopServer1.bat script.

   c. A Windows command window opens while the script is running. Wait for the command window to close.

   d. The Terminal window closes when the components are stopped.

2. Stop the Datacap Server service.

   a. Click Start > All Programs > IBM Datacap Service > Datacap Server Manager.

   b. The Taskmaster Server Manager window is shown.

   c. Click the Service tab.

   d. Click the Stop icon ■ to start the The Datacap Taskmaster Server Service if it is not already started.

   e. Click Close to close the Taskmaster Server Manager window.

3. Restart the windows server.

   a. Click Start > Restart.

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

   c. Do Procedure 2, "Start Datacap Server," on page A-2

! **Important**

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

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

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

2. Double-click the Administrative console server1 shortcut to go to the WebSphere login window at `https://ecmedu01:9043/ibm/console/logon.jsp`.

3. Log in as `p8admin` user with `IBMFileNetP8` as the password.

4. Expand the Applications > Application Types node in the left pane, and then click WebSphere enterprise applications.

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

5. Check the status of the application. If a red X is shown in the Application Status column, the application is stopped.

6. If the FileNetEngine application is stopped, select the check box for `FileNetEngine` and click Start.

7. Log out of the console and close the browser.

Configure Datacap Rulerunner for TravelDocs

Procedures

Procedure 1: Stop and Connect

1. Open the Rulerunner Server Service properties.

    a. Double-click the Rulerunner Server Manager on the desktop.

    b. Click Stop if the Rulerunner is already started.

    c. Click the Rulerunner Login tab to display it.

    d. Select Taskmaster Authentication.

       Type:
       User ID: admin
       Password: admin
       Station ID: 1

    e. Click Save if you changed the User ID or Station ID. If you only entered the password the Save control will not be active.

       It is critical that these credentials are saved because they are used at runtime.

    f. Click Connect.

Procedure 2: Configure TravelDoc tasks

2. Configuring Rulerunner to run tasks.

    a. Click the Workflow:Job:Task tab to display it.

       The names of the applications from the datacap.xml file are displayed in the left pane. The right pane does not contain threads the first time you use Rulerunner Manager.

    b. If you don't see a list of application in the top left pane, click the full screen icon in the top right corner.

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

---

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

       A new thread is created in the right pane. For this exercise you use the existing thread.

    d. In the left pane, click the TravelDocs check box.

    e. The application tree expands with the Server, Administrator, and Engine databases selected.

    f.   Click the check boxes under the Main Job, Web Job and the Navigator Job for the PageID, Profiler, and Export tasks.

    g.   Click the Main Job text and drag it to the thread0 node in the right pane. Release the mouse key while the cursor is hovering over thread0.

    h.   Verify that PageID, Profiler, and Export tasks appear under thread0for the Main Job, Web Job and the Navigator Job.

    i.   Click Save (or CTRL+S) to save your changes.

    j.   If you see a warning that the file does not exist, click Yes acknowledge the warning and to save the configuration file.

    k.   Make sure that the thread0 check box in the right pane is selected.

3. Disconnect from the application

    a.   Click the Rulerunner Login tab.

    b.   Click Disconnect.

    c.   Close the Datacap Rulerunner Manager Window.

Enable Datacap Rulerunner logging

1. If Rulerunner is connected then do <u>Procedure 1, "Stop and Connect,"</u> on page A-8 to open and connect to Datacap Rulerunner Manager.

2. Configure Logging.

    a. Click the Settings tabs and click *Write to Debug. Log Queuing activity in debug table*.

    b. Click Save or CTRL+S to save your changes.

    c. Click the Logging tab.

    d. Click the Quick Log tab.

    e. Slide the Number of Messages slider to No.

    f. The Quick Log setting sets the ATM Rulerunner, and RRS log logging options.

3. Disconnect from the application

    a. Click the Rulerunner Login tab.

    b. Click Disconnect.

    c. Close the Datacap Rulerunner Manager Window.

Start the Datacap Rulerunner Manager Service

Procedure 1: Start the Rulerunner service

1. Double-click the Datacap Rulerunner Manager icon on the Desktop.

2. Click the Rulerunner tab.

3. Click Start.

4. Close the Datacap Rulerunner Manager window.

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