Course Exercises Guide

IBM Datacap 9.0.1: Configuration

Course code F256 ERC 2.0

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Unit 1. System Configuration

Estimated time

04:00 hours

Unit overview

Lessons

Requirements

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

Lessons 1-3 are done exclusively on the Windows 7 student system. In lesson 4, you use the windows Server 2008 image to configure a multi-machine configuration.

Do this first

Note

Do the Steps 1 and 2 on the ECMEDU01 Server image.

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

Type	User ID	Password
Operating system	Administrator	passw0rd

2. Start WebSphere Application Server.
   a. Open the “WebSphere Admin” folder on the Desktop.
   b. Double-click the Start Server1.bat script file.

      It starts IBM FileNet Content Manager, and IBM Content Navigator.

Note

Do the Steps 3 and 4 on the DCCLIENT (client) image.

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

Type	User ID	Password
Operating system	Administrator	class

4. 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 Datacap 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.

Image Preparation

Note

Do the Image Preparation steps on the ECMEDU01 Server image.

1. Configure NENU for LLLDAP authentication.

   In unit 2 of this class there is lesson for Datacap Maintenance Manager which uses a sample application named NENU. This Application needs to be enabled for LLLDAP authentication. To do this you copy the Admin Database from the Expense Demo application to the NENU application folder.

   a. Open the Datacap Server Manager and stop the Datacap Service if is not stopped.
   b. Open Windows Explorer.
   c. Go to C:\Datacap\ExpenseDemo. Right-click the ExpenseDemoAdm.mdb database and select Copy.
   d. Go to C:\Datacap\NENU. Right-click and select Paste.
   e. Rename NENUAdm.mdb to NENUAdm-save.mdb.
   f. Rename ExpenseDemoAdm.mdb to NENUAdm.mdb.

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.

Note

Do the Step 3 and 4 system check on the DCCLIENT (client) image. Do all other system check steps on the server image ECMEDU01.

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

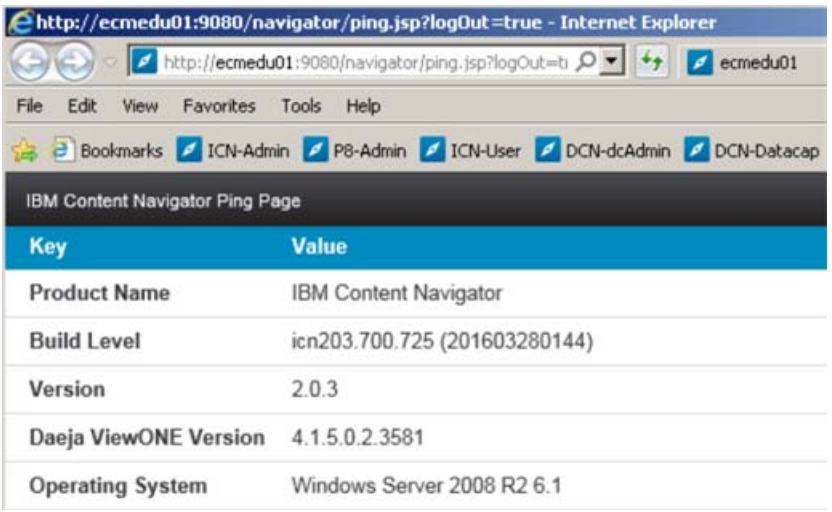
   URL: http://ecmedu01:9080/navigator/Ping

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

   a. Log in using p8admin/IBMFielNetP8.

   b. Verify that the Navigator Ping page is displayed as shown in the following screen capture.

      This page displays the version information for Content Navigator and Operating system.



2. In the student server image, open a command prompt window and ping the DCCLIENT student image.

   Start > Accessories > Command Prompt

   ping dcclient

   Verify that the responding address is the same as the client IP address.

3. In the student client image, open a command prompt window and ping the ECMEDU01 student image.

   Start > Accessories > Command Prompt

   ping ecmedu01

Verify that the responding address is the same as the ecmedu01 IP address.

4. In the student client (DCCLIENT) image, log in to the TravelDocs application with Datacap Studio as admin/admin to verify that the Datacap Server is active and connected.
   a. Double-click the Datacap Studio icon on the desktop.
   b. Select the TravelDocs application and click Next.
   c. Use admin/admin for User ID and Password, and 1 for the Station.

      If you are able to login successfully, then the Datacap Server Manager service is started and servicing authentication requests.
   d. Click Exit in the upper right corner of the window to close Datacap Studio.
5. In the student server image, check Tivoli Directory Services.
   a. Select Start > Administrative Tools > Services.
   b. Check that the Tivoli services are Started:

      DB2 - TDSV63DB2 - DB2TDS63-0

      DB2 - TDSV63DB2 - DSRDBM01

      also

      IBM Tivoli Directory Admin Server V6.3 - dsrdbm01

      IBM Tivoli Directory Server Instance V6.3 - dsrdbm01
6. In the student server image, check the Tivoli Server is started.
   a. Select Start > All Programs > IBM Tivoli Directory Server 6.3 > Web administration Tool.
   b. Login as cn=root/IBMFileNetP8
   c. Click Server administration.
   d. Click Start/stop/restart server.
   e. Click Start if the server is not started.
   f. In the left pane, scroll down and click Logout.
   g. Close the “Tivoli Directory Server Web administration Tool” window.
7. See Appendix C for procedures to Start, Check, and Restart components on the Student system.

Lesson 1.1. Datacap Single-Machine Configuration

Overview

Why is this lesson important?

As an Administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0.1 system.

In this lesson, you configure the Datacap components that are required for manual Document capture processing.

Activities

- Exercise 1: Configure Datacap Server Service and Web Access, on page 1-6

User accounts

Type	User ID	Password
Operating system	Administrator	class
Datacap	admin	admin

Note

Passwords are always case-sensitive.

Exercise 1: Configure Datacap Server Service and Web Access

Introduction

In this exercise, you configure Datacap on the Server, Datacap Web Server, and Datacap Web Client so that you can run thick and thin clients.

Procedures

Windows

In this activity, you complete the steps on the DCCLIENT student client system.

Note: If you completed the procedure in the “Do this first” section at the beginning of the Unit, then the Datacap service is already running. If it is running, then you can skip to step 3.

Procedure 1: Configure the Datacap Server

1. Open the Datacap Taskmaster Server service properties.
   a. Click Start > Administrative Tools > Services.
   b. Right-click Datacap Taskmaster Server and click Properties.
2. Start the Datacap Taskmaster Server service.
   a. On the General tab, select Automatic for the Startup type parameter.
   b. Click Start if not already started.
   c. Click OK to close the Datacap Taskmaster Server Properties windows.
   d. Close the Services window.
3. Verify that the Datacap Taskmaster Server is active by logging in to Datacap Desktop.
   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop.
   b. Type parameters:

      User: admin
      Password: admin
      Station: 1

   c. Click Start.
   d. Select the ExpenseDemo application from the Applications list.
   e. If the login attempt is successful, click All and verify that you see four batches pending processing at each task level.

Note: You see one batch at each task VScan, Profiler, Verify/fix, Export. All are in the Hold State.

f. Close the Datacap Desktop window.

Procedure 2: Configure the Datacap Web Server

There is already a Datacap Web Server that is configured on the ECMEDU01 Server image but you configure a Web Server on the DCCLIENT image so that you become familiar with the configuration steps.

1. Open the Datacap Web Server Configuration tool.
   a. Click Start > All Programs > IBM Datacap Web > Datacap Web Server Configuration Tool.
   b. Verify that all components are listed as “Found”.
   c. Click OK.
   d. On the Datacap Web Server Configuration window, accept all default options.
   e. Click Configure. See Note
   f. Click OK to acknowledge the Successfully Configured information box.

   Notice that all options are gray. If you need to change options, you must click Unconfigure to gain access to the options.

   g. Click Exit.

Note

You might have to reconfigure your Screen resolution is you can’t see the Configure and Exit actions.

Procedure 3: Configure the Datacap Web Client

1. Add TMWeb.net server to the Trusted Sites on the workstation that runs Datacap Web Client.

   If you do this process on any machine that has a 64-bit and 32-bit version Internet Explorer, be sure that you always use the 32-bit version. On the class image use the IE icon on the icon tray to be sure you use the 32-bit version of IE.

   a. Click Start > All Programs.
   b. Scroll up to almost the top of the menu and select Internet Explorer.

   Note: Not Internet Explorer (64-bit)

   c. Click Tools > Internet Options > Security tab > Trusted Sites > Sites.
   d. Make sure that the check box is clear for “Require server verification (https:) for all sites in the zone.”
   e. Type http://dcclient in the *Add this website to the zone* parameter and click Add.
   f. Click Close to close the site window.

2. Enable ActiveX controls.
   a. Click the Security tab.
   b. Click Custom level...
   c. Verify that “Download signed ActiveX controls” is enabled. Set enabled if it is not already set.
   d. Verify that “Initialize and script ActiveX controls not marked as safe for scripting” is enabled. Set enabled if it is not already set.
   e. Click OK to close the Security Settings window.
   f. Click Yes to acknowledge Warning.
   g. Click OK to close the Internet Options window.
   h. Close the browser.
3. Configure the Internet Information Services (IIS).
   a. Click Start > Administrative Tools > Internet Information Services (IIS) Manager.
   b. Under Connections in the left pane, expand the Web Server Node (DCCLIENT) and select Application Pools.
   c. Select tmweb.net AppPool in the middle pane.
   d. Choose Advanced Settings in the right pane.
   e. Under Process Model select Identity.
   f. Click the ellipses.
   g. Click Custom account and click Set.
   h. Type Administrator for user name and class for the password and confirm password fields.
   i. Click OK to close the Set Credentials window.
   j. Click OK to close the Application Pool Identity window.
   k. Click OK to close the Advanced Settings window.
   l. Close the Internet Information Services (IIS) Manager window.
4. Open the Datacap Web Client Configuration tool.
   a. Click Start > All Programs > IBM Datacap Web > Datacap Web Client Configuration Tool.
   b. Verify or enter the Site as http://localhost/tmweb.net.

      The localhost server name works in a single-server configuration such as the class image. In a real multi-server configuration, you must use the name of the web server.

   c. Click Configure.
   d. Click OK to acknowledge the Successfully Configured message.
   e. Click Exit.
5. Run the ietest.aspx.
   a. Open Internet Explorer. You can use the Internet Explorer icon on the icon tray.

b. Click the tmweb-client shortcut on the bookmark menu bar.

c. Click the IE Test Page link in the top left corner. (http://localhost/tmweb.net/ietest.aspx)

Wait a few moments for the test page to open.

d. Click Test on the tmweb IE Test page.

Notice that all the red X's change to green check marks and Test passed appears in red under the IE Test Page heading.

e. Click the tmweb-client shortcut on the shortcut menu bar.

f. Select TravelDocs in the Application field.

g. Enter the following values:

UserID: **admin**
Password: **admin**
Station: **1**

h. Click Login.

i. Verify that you are logged in to the Datacap Web Client and the Operations menu is open.

j. Click Logout and click OK to log out.

k. Close the browser.

End of exercise

Lesson 1.2. Maintain Users and Groups, and Configure Security

Overview

Why is this lesson important?

As an Administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0.1 system.

You must configure users and groups for each task of the document acquisition process.

Activities

- Exercise 1: Create a Datacap User and Group, on page 1-11

User accounts

Type	User ID	Password
Operating system	Administrator	class
Datacap	admin	admin

Note

Passwords are always case-sensitive.

Exercise 1: Create a Datacap User and Group

Introduction

In this activity, you use the Administrator options for the tmweb.net web client to create a Datacap user and a new group. Make the new user a member of the new group. Everyone in the new group must be able to run the verify task.

Procedures

Windows

In this activity, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 1: Set the Datacap Authentication Mode

Authentication is discussed in the next lesson. Irrespective of the Authentication mode that you select, while you are defining user and groups you must select TMA for the Authentication system. When the users and groups are defined, the mode is set back to the chosen Authentication mode.

On the Windows 7 student system, if you have not already log in, log in as Administrator.

1. Start the Datacap Server Manager and verify that the TMA Authentication method is selected.
   a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.
   b. Click the Datacap tab.
   c. If the Advanced settings are not showing, then click Show Advanced.
   d. Verify that the TMA option is selected for the Authentication System value.
   e. If TMA is not selected, do step 2 to select TMA; otherwise, close the Datacap Server Manager window and proceed to procedure 2.
2. Select TMA Authentication mode.
   a. Click the Service tab.
   b. Click Stop (Red Square). This action stops the Datacap Taskmaster Server services.
   c. Click the Datacap tab.
   d. Select the TMA option for the Authentication System value.
   e. Click Save.
   f. Click the Service tab.

g. Click Start (Right green arrow) to start the Datacap Taskmaster Server services.

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

Procedure 2: Create a User for the Verify Task

1. Log in to Datacap Web Client as the Administrator user.
   a. Open Internet Explorer.
   b. Click the tmweb-client bookmark on the taskbar.
   c. Enter or select the TravelDocs application.

      User ID: admin
      Password: admin
      Station: 1

   d. Click Login.
2. Define a New User.
   a. Click the Administrator tab and click the Users on the TravelDocs >> menu bar.
   b. Click New.
   c. Type the parameters for the Selected user details.

      Name: `vinny`
      Description: `Verify user`
      New Password: `class`
      Retype Password: `class`

   d. Clear all the Privileges and Permissions options that are selected.

      Note: These settings are defined in the group.

   e. Click Save user.

Procedure 3: Create a Group for the Verify Task

1. Define the TMVerifiers group.
   a. Click the Groups on the TravelDocs >> menu bar.
   b. Click New.
   c. Type the parameters for the selected group details.

      Name: `DCVerifiers`
      Description: `Datacap Verify group`

2. Configure the Privileges.
   a. Select the Job Monitor option.

b. In the Administrator collection, select the following options:

   Workflow
   User groups
   Users
   Shortcuts
   QA

c. In the Client(s) collection, select the following option.

   Taskmaster Web

3. Configure the Permissions subgroup.
   a. In the Main Job, Web Job, and Navigator Job collections select:

      Verify
      Clear all other Main Job options

4. Select the user in the group.
   a. In the Users in group subsection select:

      vinny

   b. Clear the check box for all the other users.
5. Save the group settings and log out of the Web Client.
   a. Click Save group and then click Log out.
   b. Click OK on the message window and Close the Internet Explorer window.

Procedure 4: Process a TravelDocs Document Batch

1. Start Datacap Desktop and login as susan.
   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop
   b. Enter field data:

      User: admin
      Password: admin
      Station: 1

   c. Click Start.
2. Use Datacap Desktop to process a batch through the Virtual Scan Task.
   a. Select TravelDocs from the Application list.
   b. Maximize the window.
   c. Click the Virtual Scan shortcut.
   d. Browse to the C:\Datacap\TravelDocs\images folder and click the Car1.tif image.
   e. Click Open.
   f. Set the expected field to 3.
   g. Click Scan. Three images are scanned and shown in the Batch View pane.

h. Click Submit.

i. Click OK to acknowledge the Datacap Batch finished message.

j. Click Stop to terminate the Virtual Scan task.

3. Use Datacap Desktop to process a batch through the PageID Task.

   a. Click All to verify that there is a batch pending at the PageID task.

   b. Click the PageID shortcut.

   c. Click OK to acknowledge Desktop Batch status of finished message.

   d. Click Stop to exit the auto mode.

4. Use Datacap Desktop to process a batch through the Profiler Task.

   a. Click All to verify that there is a batch pending at the Batch Profiler task.

   b. Click the Profiler shortcut and click Start.

   c. Click OK to acknowledge Desktop Batch status of finished message.

   d. Click Stop to exit the auto mode.

   e. Close the Datacap Desktop window.

5. Start Datacap Desktop and login as vinny.

   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop.

   b. Enter field data:

      User: vinny
      Password: class
      Station: 1

   c. Click Start.

6. Use Datacap Desktop to process a batch through the Verify Task.

   a. Select the Verify shortcut.

      Notice that Verify is the only shortcut available to select.

   b. Click OK to run the next pending batch.

   c. Click Submit to accept the first image.

   d. On the second Image, click the Selected option for the CDW field and click Submit.

   e. On the third image, click Car Type link and double-click the Full-size option.

   f. Click Submit to accept the third image.

   g. Click OK for the “All documents are complete. Finish batch?” prompt.

   h. Click OK to acknowledge Desktop Finish batch message.

   i. Click Stop to exit the auto mode and close the Datacap Desktop window.

End of exercise

Lesson 1.3. Authentication and Encryption

Overview

Why is this lesson important?

As an Administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0.1 system.

Datacap currently supports five User Authentication Methods. You need to select the method that integrates best with your existing Corporate Security Authentication Method.

Activities

- Exercise 1: Configure Datacap Server for LLLDAP User Authentication, on page 1-16

User accounts

Type	User ID	Password
Local Windows users	Administrator datacap	class class
Datacap Admin	admin	admin
Datacap Users	devin erin sam susan vinny	class

Note

Passwords are always case-sensitive.

Exercise 1: Configure Datacap Server for LLLDAP User Authentication

Introduction

In this activity, you configure the Datacap Taskmaster Server services and a TravelDocs application on the workstation machine to authenticate by using the LDAP services on the server machine.

Procedures

Windows

In this activity, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 1: Create Datacap Users and Groups

Users are defined in the IBM Tivoli Directory Server database that are members of Datacap Groups. The Datacap group names must match the Directory Services group names. Matching names are necessary so that when the users are authenticated with the LLLDAP Authentication System, the users are assigned the correct privileges and permissions. The assigned privileges and permissions are based on their group association with the Datacap group in the IBM Tivoli Directory Server database.

Irrespective of which authentication system you use, you must always select the TMA (Task Master Authentication) system before you configure users and groups for Datacap. Because you used Datacap Authentication in the previous lessons, the authentication system is already set to TMA.

1. Check that Datacap Server Manager is set to TMA Authentication.
   a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.
   b. Click the Datacap tab.
   c. If the Advanced settings are not showing, then click Show advanced.
   d. Verify that the TMA option is selected for the Authentication system value.

      If TMA is not selected for Authentication system, then Stop the service, Select TMA, save the changes, and restart the service.
   e. Close the Datacap Taskmaster Server Manager window.
2. Log in to Datacap Web Client as the Administrator user.
   a. Open Internet Explorer.

b. Click the tmweb-client link on the taskbar.

c. Enter or select the TravelDocs application.

Enter User ID: admin
Password: admin
Station: 1

d. Click Login.

3. Define the internal Datacap groups for each Datacap group.

a. Click Administrator on the main menu bar.

b. Click Groups on the TravelDocs >> menu bar.

c. To create the DCAdmins, and DCUsers groups, click New.

d. To create the DCDevelopers and DCSupervisors groups, instead of New, select DCAdmins and then Copy.

e. DCVerifiers was defined in an earlier lesson and is listed here for the sake of completeness.

f. To Create the DCScanners group, select the Scanners group and then Copy.

g. Type the Name and Description parameters and select the Privileges and Permissions options as defined in the Group Definition Table.

h. Clear all “Users in group” check boxes.

Group Definition Table

Group Name	Description	Privilege & Permissions
DCAdmins	Datacap Administrators group	Select all Privileges Select all Permissions
DCDevelopers	Datacap Developers group	Select all Privileges Select all Permissions
DCSupervisors	Datacap Supervisors group	Select all Privileges Select all Permissions
DCScanners	Datacap Scanners group	Inherit from Scanners Select Privileges Job Monitor Client(s) > Taskmaster Web Select the permissions: Main Job VScan Web Job iVScan, Upload Navigator Job NScan, NUpload

Group Name	Description	Privilege & Permissions
DCVerifiers	Datacap Verifiers group	Select Privileges Job Monitor Client(s) > Taskmaster Web Clear all the rest Select the permissions: Main Job, Web Job & Navigator Job Verify
DCUsers	Datacap Users group	Select Privileges Job Monitor Client(s) > Taskmaster Web Clear all the rest Select the permissions: Main Job, Web Job, and Navigator Job PageID, Profiler, Export Fixup Job FixUp

i. Click Save group.

j. Repeat step 4c to 4f for each group in the Group Definition Table.

Note

Use the table and select each group to verify that the settings from the table have been applied and saved correctly.

4. Click Log out, click OK for the logout message.
5. Close the Internet Explorer window.

Procedure 2: Configure Datacap Taskmaster Server service User

You are still logged in to the desktop on the Windows 7 image as the Administrator user.

1. Open the Datacap Taskmaster Server services.
   a. Click Start > Administrative Tools > Services.
   b. Right-click Datacap Taskmaster Server and click Properties.
   c. Click Stop to stop the service.

2. Switch to the Administrator user.
   a. Click the Log On tab.
   b. Click This Account.
   c. Click Browse and type the string for the Services user.
   d. Type: `Administrator`
   e. Click Check Names.
   f. Click OK.

      This Account: .\`Administrator`
   g. Type the password in the Password and Confirm password fields.

      Password: `class`
   h. Click OK to close the Datacap Taskmaster Server Properties window.
3. Close the Services window.

Procedure 3: Configure Datacap Server Manager to use LLLDAP

When users and groups are defined then, you must set the Authentication System back to the system you selected for your installation. The Datacap Server Manager is still stopped from the previous procedure.

1. Select the LLLDAP Authentication Method.
   a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.
   b. Click the Service tab.
   c. Verify that the Datacap Server Manager is already stopped.
   d. Click the Datacap tab.
   e. If the Advanced settings are not showing, then click Show advanced.
   f. Select the LLLDAP option for the Authentication System value.
   g. In Windows Explorer, open the

      C:\DC9-Lab Exercises\Authentication\DCServiceTemplates.txt file.
   h. Copy LLLDAP Authentication path template string from the file.
   i. Paste it in the Authentication path template field.
   j. Click Save.
2. Start Datacap Taskmaster Server services.
   a. Click the Service tab.
   b. Click Start (Right green arrow) to start the Datacap Server Manager.
   c. Click Close to close the Datacap Server Manager window.

3. If you did not complete the System Check, on page 1-3 procedure at the beginning of this unit, this would be a good time to do the following checks.
   a. Verify that WebSphere is running.
   b. Verify the Tivoli Directory Services are running.

Procedure 4: Process a TravelDocs Document Batch

1. Start Datacap Desktop and login as a Datacap Scanner user.
   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop
   b. Enter field data:

      User ID: `sam`
      Password: `class`
      Station: 1

   c. Click Startup.
   d. Select TravelDocs from the Application list.

      Notice: The login process is not complete until the application is selected and connection is made to that application.
      Also, The only shortcut visible to user sam is the Virtual Scan shortcut.

Note

If the Login fails, close and reopen the Datacap Desktop and login again.

2. Use Datacap Desktop to run the Virtual Scan Task.
   a. Click the Virtual Scan shortcut.
   b. Browse to the C:\Datacap\TravelDocs\images folder and click the Car1.tif image.
   c. Click Open.
   d. Set the expected field to 3.
   e. Click Scan. Three images are scanned and shown in the Batch View pane.
   f. Click Submit.
   g. Click OK to acknowledge the Datacap Desktop Batch finished message.
   h. Click Stop to end the Virtual Scan task.
   i. Close the Datacap Desktop window.
3. Switch the Datacap Desktop users. Log out and log in again to Datacap Desktop as user erin to run the PageID task.
   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop.

b. Enter field data:

   User ID: `erin`
   Password: `class`
   Station: 1

c. Click Start.

d. Select the TravelDocs application from the application list.

   Notice that the erin user can see the All, Background, Export, Fixup, PageID, and Profiler task Shortcuts.

e. Click the PageID shortcut.

f. Click OK to acknowledge Datacap Desktop Batch status of finished message.

g. Click Stop to end the PageID task.

4. Use Datacap Desktop while logged in as the erin user to run the Profiler Task.

   a. Click the Profiler shortcut.

   b. Click OK to acknowledge Datacap Desktop Batch status of finished message.

   c. Click Stop to end the Profiler task.

   d. Close the Datacap Desktop window.

5. Log in again to Datacap Desktop as user vinny to run the Verify task.

   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop**.**

   b. Enter field data:

      User ID: `vinny`
      Password: `class`
      Station: 1

   c. Click Start.

   d. Select the TravelDocs application from the application list.

      Notice that the vinny user can see only the Verify task Shortcuts.

   e. Click the Verify shortcut.

   f. Click OK to run the pending task.

   g. Expand the window to full screen so you can see the whole layout.

      Notice: Some fields are flagged as potential error with a red x. Verify that these fields are all correct by checking them against the image. It might be necessary to zoom in on the image to read the fields.

   h. Scroll Down and click Submit to accept the first image.

   i. On the second Image, select “Selected” option from the CDW field list.

   j. Click Submit to accept the second image.

   k. Click Car Type link and Double-click the Full-size option.

   l. Click Submit to accept the third image.

m. Click OK to acknowledge that all documents are complete.

n. Click OK to acknowledge Datacap Desktop Finish batch message.

o. Click Stop to end the PageID task.

p. Close the Datacap Desktop window.

6. Switch the Datacap Desktop users. Log out and log in again to Datacap Desktop as user erin to run the Export Task.

   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop.

   b. Enter field data:

      User ID: `erin`
      Password: `class`
      Station: 1

   c. Click Start.

   d. Select the TravelDocs application from the application list.

      Notice that the erin user can see the All, Background, Export, Fixup, PageID, and Profiler task Shortcuts.

   e. Click the Export shortcut.

   f. Click OK to acknowledge Datacap Desktop Batch status of finished message.

   g. Click Stop to end the Export task.

   h. Close the Datacap Desktop window.

End of exercise

Lesson 1.4. Multi-Machine Configuration Considerations

Overview

Why is this lesson important?

As an Administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0.1 system.

In this lesson, you consider the complexities of configuring Datacap components in a multi-machine configuration.

Activities

- Exercise 1: Configure the Datacap Server, on page 1-24
- Exercise 2: Configure the Datacap Workstation, on page 1-31
- Exercise 3: Configure the Datacap Web Server, on page 1-37

User accounts

Type	User ID	Password
Operating system	Administrator datacap	passw0rd class
Workstation Windows Users	Administrator datacap	class class
Datacap Admin (LLLDAP)	susan	class
Datacap users (LLLDAP)	evin, erin, sam, susan, vinny	class

Note

Passwords are always case-sensitive.

Exercise 1: Configure the Datacap Server

Introduction

In this activity, you do the procedures that must be done on a Datacap Server student system in a multi-machine system. Doing these procedures prepares the server for sharing server resources with other machines.

Procedures

Windows

In procedure 1, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 1: Disable Datacap Taskmaster Server service on the Windows 7 Client

1. Disable and Stop Datacap Taskmaster Server service on the Windows 7 student system.
   a. Log in to the desktop on the Windows 7 student system as the Administrator if you are not already logged in.

      User: Administrator
      Password: class
2. Open the Datacap Taskmaster Server service.
   a. Click Start > Administrative Tools > Services.
   b. Right-click Datacap Taskmaster Server and click Properties.
   c. Select Disabled from the Startup type list.
   d. Click Stop to stop the service.
   e. Click OK to close the Datacap Taskmaster Server Properties window.
   f. Close the Services window.

Windows

In procedure 2-3, you complete the steps on the Server 2008 ECMEDU01 student system.

Procedure 2: Enable Datacap Taskmaster Server Service on Server 2008

1. Start Datacap Taskmaster Server service on the Windows 2008 Server student system.
   a. Log in to the Server 2008 machine as the Administrator.

      User: Administrator
      Password: passw0rd
2. Open the Datacap Taskmaster Server services.
   a. Click Start > Administrative Tools > Services.
   b. Right-click Datacap Taskmaster Server and click Properties.
   c. Verify that the status of the service is stopped.
3. Switch to the Administrator user.
   a. Click the Log On tab.
   b. Click This Account.
   c. Click Browse and type the string for the Services user.

      Type: `datacap`
   d. Click Check Names.
   e. Click OK.
   f. Type the password `class` in the Password and Confirm password fields.
   g. Click Apply.
   h. Click OK to acknowledge the service window that opens.
4. Configure the service to Start automatically.
   a. Click the General tab.
   b. Select Automatic from the Startup type list.
   c. Click Start to immediately start the service.
   d. Click OK to close the Datacap Taskmaster Server Properties window.
   e. Close the Services window.

Procedure 3: Configure Sharing and Permissions

1. Share the Datacap Folder and Set Up Sharing Permissions.
   a. Open Windows Explorer from the taskbar.
   b. Browse to the C:\Datacap folder.

c. Right-click the Datacap folder and select Properties.

d. Click the Sharing tab.

e. Click Advanced Sharing.

f. Click Share this folder.

g. Click Permissions.

h. Click Add, type the group or user name from the “Sharing Permissions” table, and click Check Names.

Sharing Permissions

Folder	Group or User	Permissions
C:\Datacap	Administrator	Allow Full Control
	DCAdmins	Allow Full Control
	Everyone	Allow Full Control

i. If it is found, click OK.

j. Configure the permissions as indicated in the table.

k. Click Apply.

l. Repeat Steps 1.h to 1.k for each entry in the table.

m. Click OK to exit the Permissions for Datacap window.

n. Click OK to exit the Advanced Sharing window.

Note

These images do not have Active Directory installed so you do not have the ability to configure Domain accounts that would have the same permissions across all domain machines. To work around the image configuration limitation you set the Everyone Group to full control. You would not normally do this in a production environment.

2. Set Up Security on Shared Folder.

a. Click the Security tab.

b. Click Edit.

c. Click Add and type the DCAdmins group name in the “Enter the object names to select” field.

d. Click Check Names.

e. If it is found, click OK.

f. Select the Item just added and click the Full control check box.

g. Click OK to exit the Permissions for Datacap window.

h. Click Close to exit the Datacap Properties window.

3. Remove the TravelDocs application from the server.

Note

Some configuration is done to the TravelDocs application on the client machine to implement LLLDAP authentication. You need to remove the current TravelDocs application from the server so you can copy over the updated copy from the client machine.

---

a. Open Windows Explorer and browse to C:\Datacap.

b. Delete the TravelDocs folder.

c. Close the Windows Explorer window.

Windows

In procedures 4-5, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 4: Mount the Datacap folder on the Server

1. Log in to the Windows 7 student system as the Administrator.

   User: Administrator
   Password: class

2. Verify that you can access the Datacap folder on the Server.

   a. Open Windows Explorer from the taskbar.

   b. Browse to Network\ECMEDU01\Datacap.

   c. If you are prompted to log in, use `datacap/class` credential.

   d. Click the “Remember my credentials check box.

   e. Verify that you can see the Datacap folders and that the TravelDocs folder is not there.

   f. Close the Windows Explorer window.

Procedure 5: Copy TravelDocs Application to the Server

1. Start an empty Datacap Studio session.

   a. On the Windows 7 student system, select Start > All Programs > IBM Datacap Developer Tools > Datacap Studio.

   b. On the Applications window, click Close. An empty Datacap Studio main window opens on the Rulemanager tab.

2. Use the correct Datacap File.

Ensure that Datacap Studio is using the local version of the datacap.xml file. The local file contains an entry for the application that you want to copy from the Windows 7 student system to the Server student system.

a. On the Window 7 student system > Datacap Studio, click the Settings icon in the upper right.

b. Click the Application service tab to display it.

c. Set or ensure that the path in the Main application management file field is set to: C:\Datacap\datacap.xml file.

d. Click OK.

3. Copy the application to the Server

a. On the Windows 7 student system, click  Datacap Application Wizard in the upper right.

The Application Wizard Overview window opens.

b. Click Next. The Application Wizard Mode window opens.

c. Select the "*Copy an application"* option, then click Next.

The Application Wizard *Copy an existing application* window opens.

d. Select TravelDocs from the list for "*Please select an application to copy from the list"*.

e. Browse to Network\ECMEDU01\Datacap for the "Root folder on target system".

If you are prompted to login, use Username of Administrator/passw0rd.

f. Click OK.

g. Browse to C:\Datacap\tmweb.net for the "Datacap Web folder".

h. Click Next.

i. Click Finish.

Optionally view the logs by clicking the link at the bottom of the Application Wizard window.

j. Click Close.

k. Click Exit to close the Datacap Studio window.

Windows

In Procedure 6 Step 1 and 2, you complete the step on the Server 2008 ECMEDU01 student system.

Procedure 6: Configure datacap.xml Content and Location

1. On the Server 2008 ECMEDU01 student system, update the Datacap.xml file.

Important

The datacap.xml file on the Datacap Server must contain references only to the applications that exist. The applications must be deployed at the locations that are indicated in the file and that are being configured for use.

   a. Rename the C:\Datacap\datacap.xml file to datacap-save.xml.
   b. Rename the C:\Datacap\datacap-ecmedu01.xml file to datacap.xml.
   c. Edit C:\Datacap\datacap.xml and make sure that the file has only the following four entries:

      ```
      <app name="TravelDocs" ref="\\ECMEDU01\Datacap\TravelDocs"/>
      <app name="ExpenseDemo" ref="\\ECMEDU01\Datacap\ExpenseDemo"/>
      <app name="Medical Claims" ref="\\ECMEDU01\Datacap\Medical Claims"/>
      <app name="NENU" ref="\\ECMEDU01\Datacap\NENU"/>
      ```

   d. Save and then close the datacap.xml file.

2. Verify or set the location of datacap.xml file on ECMEDU01.

   For the Server 2008 student system, you must define the location of the master datacap.xml file and the location of the Datacap Server for an application.

   a. Click Start > All Programs > IBM Datacap Services > Datacap Application Manager.
   b. Click the Service tab and confirm the location of datacap.xml is C:\Datacap\datacap.xml.
   c. Close the Application Manager window.

Windows

In procedure 6 steps 3-4, you complete the steps on the Windows 7 DCCLIENT student system.

3. For the client (Windows 7) student system, set the location of the datacap.xml file on DCCLIENT to point to the Datacap Server.
   a. Click Start > All Programs > IBM Datacap Services > Datacap Application Manager.
   b. Click the Service tab and confirm the location of datacap.xml C:\Datacap\datacap.xml.
   c. Click the ellipsis next to the “Path to the application management file” field.
   d. Browse to Network\ECMEDU01\Datacap, select datacap.xml and click Open.
   e. Click the Service tab.
   f. Verify that the path is now set to \\ECMEDU01\Datacap\datacap.xml.
   g. Click the “Autosave changes” checkbox.

4. Verify that the Application paths are all pointing to \\ECMEDU01\. . .
   a. Select each application (TravelDocs, Medical Claims, ExpenseDemo, and NENU) in the Applications column and verify all the paths for all the applications.
   b. Select the Main tab. Ensure that all workflows are shown and the database paths reflect the correct UNC paths with the Datacap Server name \\ECMEDU01\ rather than C:\.

Note

If there are any database links for administration, Engine, Lookup, Fingerprint, and Export databases that are not setup, ignore them for now. You correct them in the next exercise.

The Scan source folder parameter can be left pointing to C:\Datacap\<app>\images.

   c. Repeat steps 4.a-c for each application and then close Datacap Application Manager.

Windows

In Procedure 7, you complete the step on the Server 2008 ECMEDU01 student system.

Procedure 7: Verify Application Folder Permissions

Application Folder Permissions

Folder	Group/User	Permissions
C:\Datacap\TravelDocs	Administrators	Allow Full Control
	DCAdmins	Allow Full Control

1. Select the Application folder.
   a. In Windows Explorer, browse to C:\Datacap and select the TravelDocs application folder.
   b. Right-click the folder and click Properties.
   c. Click the Security tab and click Edit.
2. Verify and Set Group Permissions.
   a. Click the group that is defined in the Group column of the table.
   b. Set the permissions as defined in the permissions column of the table.
   c. Repeat steps 2a - 2b for each entry in the Application Folder Permissions table.
3. Close Windows.
   a. Click OK to exit the Permissions for Datacap window.
   b. Click OK to exit the TravelDocs Properties window.

End of exercise

Exercise 2: Configure the Datacap Workstation

Introduction

In this activity, you do the procedures that must be done on a Datacap Workstation student system. Doing these procedures in a multi-machine system prepares the workstation for accessing server resources.

Procedures

Windows

In Procedure 1, you complete the steps on the Server 2008 ECMEDU01 student system.

Procedure 1: Exporting the Encryption Keys

Generate and export the Encryption Key from the student system where the Datacap Taskmaster Service is running.

1. On the Datacap Server (Server 2008 student system), open a command prompt window.

   Start > All Programs Accessories > Command Prompt.

2. Type the following commands:

   ```
   cd C:\Datacap\Taskmaster
   dcskey /gnk /e
   ```

   This command exports the Encryption Keys from the local keystore to the C:\Datacap\Taskmaster\dc_KTF.xml key transport file.

3. Close the Command Window.

Windows

In Procedure 2 and 3, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 2: Copy the Server Encryption Key

1. Copy the Encryption Key file that is exported on the Server to Windows 7 client student system.
   a. Log in to the desktop as the Administrator if you are not already logged in.

      User: `Administrator`
      Password: `class`

   b. On the Windows 7 student system, start Windows Explorer, go to Network \ECMEDU01\Datacap\Taskmaster folder.
   c. Right-click and copy the dc_KTF.xml file.
   d. Go to the C:\ Datacap\Taskmaster folder on the Windows 7 student workstation system.
   e. Right-click and paste the dc_KTF.xml file on the workstation system.
   f. Close the Explorer window.

Procedure 3: Import the Encryption Key

   a. Click Start > All Programs > Accessories > Command Prompt.

      A command window opens.

   b. Type the following commands:

      cd C:\Datacap\Taskmaster
      dcskey -i

      Verify that you get a message that the keys were successfully imported.

   c. Close the Command Prompt window.

Windows

In procedure 4, you complete the steps on the Windows 7 DCCLIENT student system.

It is almost certain that after importing security the Server security key, you have to redefine the Database connection strings for each application defined in the datacap.xml file.

Procedure 4: Configure the database connection parameters

1. Open the Datacap Application Manager.
   a. Click Start > All Programs > IBM Datacap Services > Datacap Application Manager.
   b. Select the application to which you want to set the location, for example TravelDocs. The paths display in the fields on the Main tab.

Important

The parameters for the five database connections are most likely blank. The reason for this is that the database paths are encrypted in a multi-machine configuration. When you imported the encryption key from the server, the database paths are cleared so that they can be redefined with the new key. Do step 2 to initialize the connections.

2. Configure the database connection parameters for five databases.

Tab	Variable Name	Database
Main	administration	TravelDocsAdm
	Engine	TravelDocsEng
	Lookup database	TravelDocsLook
	Fingerprint database	TravelDocsFingerprint
	Export database	TravelDocsExport

   a. Click the Ellipsis at the right of the field.
   b. Select Microsoft Access (Jet) from the “Database Type or provider name” list.
   c. Click the Database Ellipsis and browse and select the database.
   d. Network\ECMEDU01\Datacap\TravelDocs\ <database>.
   e. Click Test connection (optional).
   f. Click OK.
   g. Repeat steps 2.a-f for each database table.
   h. Verify that the Application paths are all pointing to \\ECMEDU01\. . .
   i. Ensure that all workflows are displayed and that all of the database paths reflect the correct UNC paths with the Datacap Server name \\ECMEDU01\ rather than C:\.
   j. Change the Name or IP address field to the name of the Datacap Server without using backslashes to `ECMEDU01`.
   k. Select another application in the Applications Manager and repeat steps 2.a-f for each of its database connection strings.
   l. Repeat the process for each application defined in the datacap.xml file. The consequence of not redefining the database connection strings is unpredictable authentication behavior.
   m. Close the Application Manager.

Procedure 5: Verify the New Configuration with TMA Authentication

Windows

In Procedure 5, you complete the steps on the Server 2008 ECMEDU01 student system.

1. On the Server 2008 student system ECMEDU01, start the Datacap Server Manager and verify that the TMA Authentication method is selected.
   a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.
   b. Click the Datacap tab.
   c. If the Advanced settings are not showing, then click Show advanced.
   d. Verify that the TMA option is selected for the Authentication System value.
   e. If TMA is not selected, do step 2 to select TMA; otherwise, close the Datacap Server Manager window and proceed to step 3.
2. Select TMA Authentication mode.
   a. Click the Service tab.
   b. Click Stop (Red Square). This action stops the Datacap Taskmaster Server services.
   c. Click the Datacap tab.
   d. Select the TMA option for the Authentication System value.
   e. Click Save to save your changes.
   f. Click the Service tab.
   g. Click Start (Right green arrow) to start the Datacap Taskmaster Server services.
   h. Close the Datacap Server Manager window.
3. Verify that the Datacap Server is active by logging in to Datacap Desktop.
   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop.
   b. Type parameters:
      User: admin
      Password: admin
      Station: 1
   c. Click Start.
   d. Select the TravelDocs application.
   e. If the login attempt is successful, shortcut menu is populated with valid tasks.
   f. Close the Datacap Desktop window.

Windows

In procedure 6, you complete the steps on the Server 2008 ECMEDU01 student system.

Procedure 6: Verify the New Configuration with LLLDAP Authentication

1. On the Server 2008 student system ECMEDU01, start the Datacap Server Manager and switch to the LLLDAP Authentication method.
   a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.
   b. Click Stop (Red Square). This action stops the Datacap Taskmaster Server services.
   c. Click the Datacap tab.
   d. If the Advanced settings are not showing, then click Show advanced.
   e. Select the LLLDAP option for the Authentication System value.

      For the LLLDAP authentication mode, the Application path template field must be configured. The following text is the template that is used:

      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%>))

      To avoid any typing errors, this template is provided for you to copy in the C:\DC9-LabExercises\Authentication\DCServiceTemplates folder.
   f. Copy and past the string from the sample file to the Application path template field.
   g. Click Save.
   h. Click the Service tab.
   i. Click Start (Right green arrow) to start the Datacap Server Manager services.
   j. Click Close to close the Datacap Server Manager window.
2. Verify that encryption and security is correct for the Datacap supervisors user susan account.
   a. Click Start > All Programs > Datacap Clients > Datacap Desktop.
   b. Type parameters:

      User: susan
      Password: class
      Station: 1
   c. Click Start.

      If the login attempt is successful, the Datacap Desktop client opens. There is a link for each task that the logged in user is authorized to run. You can select the application you want to operate on from the application list.
   d. Verify that you can select the TravelDocs application, if it is not already selected.

3. Close the Datacap Desktop window.

Procedure 7: Verify LLLDAP Authentication for Each Datacap Account

Procedure 7 is a sample procedure and does not need to be done on the class image.

Windows

This procedure needs to be done for each windows user account that is used for logging into each server or workstation that authenticates using this LDAP Directory Services database.

For each server or workstation computer you run procedure 1 and 2.

Procedure 1, "Exporting the Encryption Keys," on page 1-31

Procedure 2, "Copy the Server Encryption Key," on page 1-32

For each Windows desktop user that logs into each system do procedure 3 to initialize the security encryption key for each user.

Procedure 3, "Import the Encryption Key," on page 1-32

End of exercise

Exercise 3: Configure the Datacap Web Server

Introduction

In this activity, you do the procedures that must be done on a Datacap Web Server student system in a multi-machine system. Doing these procedures prepares the web server for sharing web services.

Procedures

Procedure 1, "Convert to run tmweb with the Server web service," on page 1-37

Important

In Lesson 1, you already did the tmweb configuration to run tmweb client with the workstation resident web server. You need to complete the following steps for each tmweb server machine:

Lesson 1 Procedure 2, "Configure the Datacap Web Server," on page 1-7
Lesson 1 Procedure 3, "Configure the Datacap Web Client," on page 1-7

The student server image ecmedu01 is configured with a Datacap web server. As part of these labs, you configured a second Datacap web server on the dcclient image.

The student client image dcclient is configured with two tmweb URLs for your convenience:

tmweb-server = http://ecmedu01/tmweb.net
tmweb-client = http://dcclient/tmweb.net

In a production environment, each user would log into their own workstation with their desktop credential and configure their own Datacap web client URL.

Windows

In this activity, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 1: Convert to run tmweb with the Server web service

1. Log in to the Windows 7 DCCLIENT student system as user Administrator/ class.
2. Make the server machine a trusted site on the client browser.
   a. Open Internet Explorer.
   b. Click Tools > Internet Options > Security > Trusted Sites > Sites.
   c. Make sure that the check box is clear for “Require server verification (https:) for all sites in the zone.”
   d. Type http://ecmedu01 in the *Add this website to the zone* parameter and click Add.
   e. Click Close to close the site window.

f. Click OK to close the Internet Options window.

3. Log in to tmweb on the Server system for the TravelDocs application.
   a. In Internet Explorer on the dcclient system, enter the URL: http://ecmedu01/tmweb.net or use the tmweb-server bookmark.
   b. Select TravelDocs for the Application.
   c. Enter the following values:

      User ID: susan
      Password: class
      Station: 1

   d. Click Login.
   e. Verify that the login is successful.
   f. Logout of Internet Explorer and close the window.

End of exercise

Unit 2. Component Configuration

Estimated time

04:00 hours

Unit overview

Lessons

Requirements

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

Do this first

Note

Do the Steps 1 and 2 on the ECMEDU01 Server image.

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

Type	User ID	Password
Operating system	Administrator	passw0rd

2. If you have not done already, start WebSphere Application Server.
   a. Open the “WebSphere Admin” folder on the Desktop.
   b. Double-click the Start Server1.bat script file.

      It starts IBM FileNet Content Manager, and IBM Content Navigator.

System check

1. Log in to the Datacap 9.0.1 student server image (machine name ECMEDU01) as Administrator / passw0rd.
2. Log in to the Datacap 9.0.1 student client image (machine name DCCLIENT) as Administrator / class.
3. On the server image ECMEDU01, open a command prompt window and ping the DCCLIENT student image.

   Start > Accessories > Command Prompt

   ping dcclient
4. On the client image DCCLIENT, open a command prompt window and ping the ECMEDU01 student image.

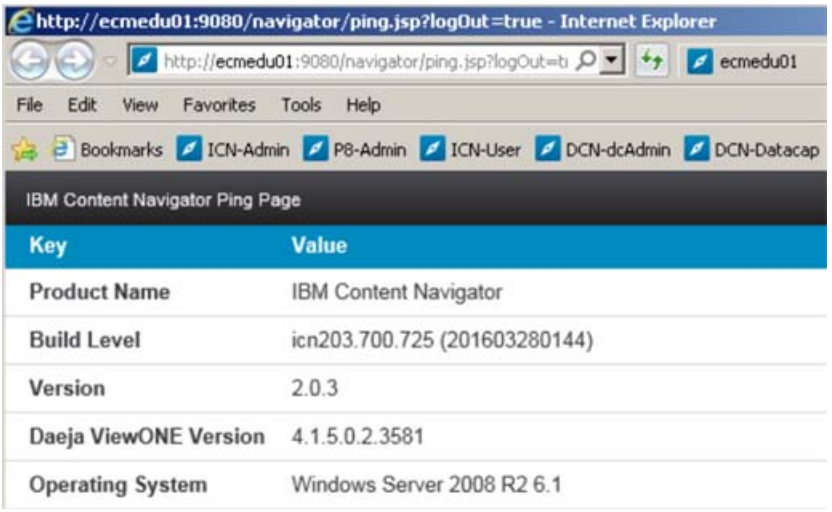
   Start > Accessories > Command Prompt

   ping ecmedu01
5. Mount the Datacap folder that is on the Server.
   a. On the Windows 7 client system, verify that you can access the Datacap folder on the Server.
   b. Open Windows Explorer from the taskbar.
   c. Browse to Network\ECMEDU01\Datacap.
   d. If you are prompted to log in, use `datacap/class` credential.
   e. Click the “Remember my credentials check box.
   f. Verify that you can see the Datacap folders.
   g. Close the Windows Explorer window.
6. In the server image ECMEDU01 > Internet Explorer browser, go to IBM Content Navigator Ping page and check that the IBM Content Navigator is working:

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

   You can also use the “ICN Ping Page” shortcut in the Internet Explorer browser.
   a. Log in using p8admin/IBMFielNetP8.
   b. Verify that the Navigator Ping page is displayed as shown in the following screen capture.

      This page displays the version information for Content Navigator and Operating system.



Information

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

7. If steps 1-6 are successful, then the images are ready to proceed with the class activities.

Lesson 2.1. Configure Datacap Rulerunner

Overview

Why is this lesson important?

As an Administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0.1 system.

In this lesson, you configure the Datacap Rulerunner component, which provides background processing capability for tasks that do not require user intervention.

Activities

- Exercise 1: Configure and Start Rulerunner, on page 2-5

User accounts

Type	User ID	Password
Windows Administrator	Administrator	class
Datacap user	susan erin sam vinny	class class class class

Note

Passwords are always case-sensitive.

Exercise 1: Configure and Start Rulerunner

Introduction

In this activity, you configure Rulerunner. You configure tasks that do not require operator intervention and that Rulerunner can process.

Rulerunner is normally run on a separate server for performance reasons. Multiple instances can be run on multiple servers and each instance can be configured to run multi-threaded for a multi-core processor. In the class configuration, you run it on the same machine as the Datacap server so some of the configuration is already complete.

Procedures

Windows

In procedure 1, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 1: Process a TravelDocs Document Batch Manually

The instructions assume that all of the applications that you want Rulerunner to process are already installed, configured, and run successfully manually. To make troubleshooting easier, run tasks manually for the application that you want to process with Rulerunner.

1. Log in to the desktop on the Windows 7 image as the Administrator user.

   User ID: `Administrator`
   Password: `class`

2. Start Datacap Desktop and login as a Datacap Scanner user.

   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop

b. Enter field data:

   User: sam
   Password: *class*
   Station: 1

c. Click Start.

   The Desktop window opens.
   Select TravelDocs from the application list if it isn't already selected.

3. Use Datacap Desktop to process a batch through the Virtual Scan Task.
   a. Click the Virtual Scan shortcut.
   b. Click OK to run the next pending batch.
   c. Browse to the C:\Datacap\TravelDocs\images folder and click the Car1.tif image.
   d. Click Open.
   e. Set the expected field to 3.
   f. Click Scan. Three images are scanned and shown in the Batch View pane.
   g. Click Submit.
   h. Click OK to acknowledge the Datacap Desktop Batch finished message.
   i. Click Stop to end the Virtual Scan task.
   j. Close the Datacap Desktop window.
4. Use Datacap Desktop to process a batch through the PageID Task.
   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop
   b. Enter field data:

      User: *erin*
      Password: *class*
      Station: 1

   c. Click Start.

      The Desktop window opens.

   d. Select TravelDocs from the application list if it isn't already selected.
   e. Click the PageID shortcut.
   f. Click OK to run the next pending batch.
   g. Click OK to acknowledge Datacap Desktop Batch status of finished message.
   h. Click Stop to end the PageID task.
5. Use Datacap Desktop to process a batch through the Profiler Task.
   a. Click the Profiler shortcut.
   b. Click OK to acknowledge Datacap Desktop Batch status of finished message.
   c. Click Stop to end the Profiler task.

d. Close the Datacap Desktop window.

6. Use Datacap Desktop to process a batch through the Verify Task.
   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop
   b. Enter field data:

      User: *vinny*
      Password: *class*
      Station: 1

   c. Click Start.

      The Desktop window opens.

   d. Select TravelDocs from the application list if it isn't already selected.
   e. Click the Verify shortcut.
   f. Click Submit to accept the first image.
   g. Click OK on the verification failed message.
   h. On the second Image, Select the Selected option for the CDW field.
   i. Click Submit.
   j. On the third image, click Car Type link and double-click the Full-size option.
   k. Click Submit to accept the third image.
   l. Click OK to acknowledge the "All documents are completed. Finish Batch" message.
   m. Click Stop to end the Verify task.
   n. Close the Datacap Desktop window.
7. Use Datacap Desktop to process a batch through the Export Task.
   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop
   b. Enter field data:

      User: *erin*
      Password: *class*
      Station: 1

   c. Click Start.

      The Desktop window opens.

   d. Select TravelDocs from the application list if it isn't already selected.
   e. Click the Export shortcut.
   f. Click OK to acknowledge Datacap Desktop Batch status of finished message.
   g. Click Stop to end the Export task.
   h. Close the Datacap Desktop window.

Windows

In procedure 2, you complete the steps on the Server 2008 ECMEDU01 student system.

Procedure 2: Collect Configuration Information

You activate Rulerunner on the Windows 2008 Server image. Security requirements for Rulerunner Service are the same as the Datacap Manager Server service so you use the same Datacap account.

1. Create or ensure that resources are configured on the Server as shown in step 1.a -1.b.
   a. Server name: ECMEDU01
   b. Other Datacap computers

      Datacap Workstation or client system: DCCLIENT
   c. Authentication system:
      i. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.
      ii. Click the Datacap tab.
      iii. Authentication system: **LLLDAP**
      iv. Click Close to close the Datacap Server Manager.

Information

The application that is selected for running under Rulerunner is:

- Application: **TravelDocs**

The user that is created for running the Datacap Taskmaster Server service and the Datacap Rulerunner Service is:

- Services user: **datacap**
- Password: **class**

Windows

In procedure 3, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 3: Set Service Credentials for Application

1. Log in to Datacap Web Client as the Administrator user.
   a. Open Internet Explorer.

b. Click the tmweb-server link on the taskbar.

   Type or Select the TravelDocs application.
   User ID: susan
   Password: class
   Station: 1

c. Click Login.

Note

For Rulerunner to run background tasks automatically there must be station defined in the application that has the same name as the Rulerunner server.

2. Add Datacap Station. Read important note before this step.
   a. Click the Administrator tab and click Stations.
   b. Click New, and enter:

      Name: ECMEDU01
      Description: Rulerunner Station
      Maximum: 9999
      Select Permissions.
      Main Job - PageID, Profiler, and Export
      Web Job - PageID, Profiler, and Export
      Navigator Job - PageID, Profiler, and Export

   c. Click Save.
   d. Click Log out.
   e. Click OK on the Message from web page window.
   f. Close the Internet Explorer window.

Windows

In procedures 4 - 6, you complete the steps on the Server 2008 ECMEDU01 student system.

Procedure 4: Verify RRS Folder Permission

You must set up the appropriate security permissions for the C:\Datacap\RRS folder on the Server when the operating system for the Server is Windows 2008.

1. On the Server image, log in as Administrator.
2. Start Windows Explorer, go to the C:\Datacap\RRS folder.
3. Right-click the C:\Datacap\RRS folder and select Properties.
4. Click the Security tab to display it.

5. Click the DCAdmins group and verify that it is set to allow Full Control.
6. Click OK to close the Properties window.

Procedure 5: Configure Rulerunner on Multiple Servers

Important

If you have multiple Rulerunner servers, you would do the following procedure on each machine. Because you are configuring Rulerunner on the Datacap Server, **it is not necessary to do step 1 and 2.**

1. Import Encryption Keys. Encryption Keys are already imported for your class configuration because Datacap Server and Rulerunner Server are the same machine.
2. Set Location of Datacap.xml. This step is already done for your class configuration because Datacap Server and Rulerunner Server are the same machine.
3. Grant permission to the Rulerunner account on the Rulerunner servers. Configure the DCOProcessor application.
   a. In your server image, click Start > Administrative Tools > Component Services.
   b. Expand Component Services > Computers > My Computer.
   c. Click DCOM Config.
   d. In the middle pane, locate, and right-click the DCOProcessor application. Select Properties.
   e. Click the Security tab to display it.
   f. Under Launch and Activation Permissions, select Customize, then click Edit.
   g. Click Add, type datacap and click Check Names.
   h. Click OK.
   i. Set Allow **Local Launch** and Allow **Local Activation**.
   j. Click OK.
   k. Click OK to exit the DCOProcessor Properties.
4. Configure the RRProcessor Application.
   a. In the middle pane, locate, and right-click the RRProcessor application. Select Properties.
   b. Click the Security tab to display it.
   c. Under Launch and Activation Permissions, select Customize, then click Edit.
   d. Click Add, enter datacap, and click Check Names.
   e. Click OK.
   f. Set Allow **Local Launch** and Allow **Local Activation**.
   g. Click OK.

h. Click OK to exit the RRProcessor Properties.

i. Close the Component Services window.

5. Setting up security on the systemprofile\AppData folder for Rulerunner.

a. On the Rulerunner Server, start Windows Explorer.

b. Go to c:\Windows\SysWOW64\config\systemprofile\AppData.

c. Right-click the folder, and select Properties.

d. Click the Security tab, then click Edit.

e. Click Add, type datacap and click Check Names.

f. Set to allow Modify.

g. Click OK.

h. Click Yes on security window.

i. Click OK close the properties window.

j. Close Windows Explorer.

Procedure 6: Configure Datacap Rulerunner Service

Important

You must complete this step. If you were configuring a Multiple Rulerunner server configuration, you would repeat this procedure on each Rulerunner server.

1. In your server image, open the Rulerunner Server Service properties.

a. Click Start > Administrative Tools > Services.

b. Right-click Datacap Rulerunner Service and click Properties.

2. Set the user credentials.

a. Click the Log On tab to display it.

b. Select This account.

c. Click Browse.

d. Type `datacap` and click Check Names.

e. Click OK.

f. Enter the account password (`class`) twice, and click Apply.

g. Click OK to close the Properties dialog.

h. Close the Services windows.

Windows

In procedure 7, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 7: Configure Rulerunner to run your applications

1. Gather this information that is needed to set up Rulerunner.

   Authentication system: LLLDAP
   Rulerunner Server name: ECMEDU01
   Processors available: 1
   Admin Database UNC: //ECMEDU01/Datacap/TravelDocs/TravelDocsAdm.mdb
   Engine Database UNC: //ECMEDU01/Datacap/TravelDocs/TravelDocsEng.mdb
   Workflow Name: TravelDocs
   Job Name: Main Job
   Task Names: PageID, Profiler, Export
   Job Name: Web Job
   Task Names: PageID, Profiler, Export
   Job Name: Navigator Job
   Task Names: PageID, Profiler, Export

2. Configuring the task profiles that Rulerunner runs.

   a. From the Windows 7 client image > Start menu, select All Programs > IBM Datacap Services > Datacap Application Manager. Or use the shortcut on the desktop.

   b. Select your application.

      Paths appear in the fields on the Main tab.

   c. Ensure that all of the paths are correct.

Datacap Application Manager Fields table

Fields on Main tab	Value
Batch folder:	\\ECMEDU01\Datacap\TravelDocs\batches
Export folder:	\\ECMEDU01\Datacap\TravelDocs\export
Fingerprint folder:	\\ECMEDU01\Datacap\TravelDocs\fingerprint
Setup DCO:	\\ECMEDU01\Datacap\TravelDocs\dco_TravelDocs\TravelDocs.xml
Rules folder:	\\ECMEDU01\Datacap\TravelDocs\dco_TravelDocs\rules
VScan source folder:	C:\\Datacap\TravelDocs\images or \\ECMEDU01\TravelDocs\Images
Imagefix INI:	\\ECMEDU01\Datacap\TravelDocs\dco_TravelDocs\imagefix.ini
administration:	Provider=Microsoft.Jet.OLEDB.4,0;Data Source=\\ECMEDU01\Datacap\TravelDocs\TravelDocsAdm.mdb;
Engine:	Provider=Microsoft.Jet.OLEDB.4,0;Data Source=\\ECMEDU01\Datacap\TravelDocs\TravelDocsEng.mdb;
Lookup database:	Provider=Microsoft.Jet.OLEDB.4,0;Data Source=\\ECMEDU01\Datacap\TravelDocs\TravelDocsLook.mdb;
Fingerprint database:	Provider=Microsoft.Jet.OLEDB.4,0;Data Source=\\ECMEDU01\Datacap\TravelDocs\TravelDocsFingerprint.mdb;

Fields on Main tab	Value
Export database:	Provider=Microsoft.Jet.OLEDB.4,0;Data Source=\\ECMEDU01\Datacap\TravelDocs\TravelDocsExport.mdb;

d. Click the Rulerunner tab to display it.

   This tab displays only the task profiles that Rulerunner is to process.

e. Click the red X to the right of the VScan profile name to remove a task profile.

f. Click Yes to confirm you want to remove the task.

g. Close the Datacap Application Manager.

Windows

In procedure 7 steps 3 - 5, you complete the steps on the Server 2008 ECMEDU01 student system.

3. Start the Datacap Rulerunner Manager and connect to the application.

   a. From the Rulerunner Server Start menu, select All Programs > IBM Datacap Services > Datacap Rulerunner Manager.

   b. Click the Rulerunner Login tab to display it.

   c. Select Taskmaster Authentication.

      Type:
      User ID: datacap
      Password: class
      Station ID: 1

   d. Click Save.

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

   e. Click Connect.

4. View the workflow:JobTask tab.

   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.

Troubleshooting

If your login attempt fails, then check the following information. The first application in the datacap.xml file must be able to authenticate using the selected Authentication system. In this course example, LLLDAP is the authentication system and ExpenseDemo is the first entry.

Note

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

5. Delete the TravelDocs Rulerunner tasks and re-create them.
   a. Right-click <thread0> in the right pane and select Remove.
   b. In the left pane, click the TravelDocs check box.
   c. The application tree expands with the Server, Administrator, and Engine databases selected.
   d. Right-click the right pane, select Threads, and then select Add Thread.

      A new thread is created in the right pane.
   e. In the left pane, select the check boxes under the Main Job, Web Job, and the Navigator Job for the PageID, Profiler, and Export tasks.
   f. Click the TravelDocs{tms,tmsadmin,tmsengine} text at the root of the TravelDocs tree and drag it to the thread0 node in the right pane. Release the mouse key while the cursor is hovering over thread0.
   g. Under thread0, verify that PageID, Profiler, and Export appear under the Main Job, Web Job, and the Navigator Job.
   h. Click Save (or CTRL+S) to save your changes.
   i. If you see a warning, click Yes to acknowledge the “File does not exist “warning and to save the configuration file.
   j. Make sure that the thread0 check box in the right pane is selected.
6. Enable Datacap Rulerunner 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.
7. Configure Logging.
   a. Click the Logging tab.
   b. Click the Quick Log tab.
   c. Slide the Number of Messages slider to No.
   d. The Quick Log setting sets the ATM Rulerunner, and RRS log logging options.

Information

If while you are testing, the Rulerunner tasks are not being processed, return to this logging screen and set the Quick Log slider to Maximum.

8. Disconnect from the application and close the Datacap Rulerunner Manager.
   a. Click the Rulerunner Login tab.
   b. Click Save.
   c. Click Disconnect.
   d. Close the Datacap Rulerunner Manager window.

Windows

In this procedure, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 8: Scan a New Batch with Datacap Desktop

1. Log in to the desktop on the windows 7 image as the Administrator user.

   User ID: `Administrator`
   Password: `class`
2. Start Datacap Desktop and login as a Datacap Scanner user.
   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop
   b. Enter field data:

      User: sam
      Password: *class*
      Station: 1
   c. Click Start.
   d. Select TravelDocs application if it not already selected.
3. Use Datacap Desktop to process a batch through the Virtual Scan Task.
   a. Select the Virtual Scan shortcut and click Start.
   b. Browse to the C:\Datacap\TravelDocs\Images folder and click the Car1.tif image.
   c. Click Open.
   d. Set the expected field to 3.
   e. Click Scan. Three images are scanned and shown in the Batch View pane.
   f. Click Submit.
   g. Click OK to acknowledge the Datacap Desktop Batch finished message.

h. Click Stop to end the Virtual Scan task.

Windows

In procedure 9 step1, you complete the steps on the Server 2008 ECMEDU01 student system.

Procedure 9: Run TravelDocs Tasks with Rulerunner

1. Starting the Datacap Rulerunner Service.
   a. From the Start menu of the Rulerunner Server, select All Programs > IBM Datacap Services > Datacap Rulerunner Manager.
   b. Click Start.
   c. Verify that the status changes to Running.
   d. Close the Rulerunner Manager window.

Windows

In procedure 9, steps 2- 3, you complete the steps on the Windows 7 DCCLIENT student system.

2. Log in to Datacap Web Client as the Administrator user.

   Monitor your batches with the Datacap Web Job Monitor. Watch batches change status as Rulerunner processes them.
   a. Open Internet Explorer.
   b. Click the tmweb-server link on the taskbar.
   c. Type or Select the TravelDocs application.

      User ID: susan
      Password: class
      Station: 1
   d. Click Login.
3. View Jobs in the Job Monitor.
   a. Click Monitor.
   b. View the Job Status of your batch and check for todays date as Rulerunner processes the PageID and Profiler task.
   c. The Task processing stops when the task reaches the Verify Task.
   d. Log out of the tmweb.
   e. Close the Internet Explorer window.

Windows

In procedures 10 - 11, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 10:Process the Verify Task with Datacap Desktop

1. Use **Datacap Desktop** to process a batch through the Verify Task.
   a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop
   b. Enter field data:

      User: *vinny*
      Password: *class*
      Station: 1

   c. Click Start.
   d. Select the TravelDocs application if it is not already selected.
   e. Click the Verify shortcut.
   f. Correct field as necessary and click Submit to accept each image.
   g. Click OK to acknowledge Datacap Desktop Finish batch message.
   h. Close the Datacap Desktop window.

Procedure 11:Verify that Rulerunner runs the Export Task

1. Log in to Datacap Web Client as the Administrator user.
   a. Open Internet Explorer.
   b. Click the tmweb.net link on the taskbar.
   c. Type or Select the TravelDocs application.

      User ID: susan
      Password: class
      Station: 1

   d. Click Login.
2. View Jobs in the Job Monitor.
   a. Click Monitor.
   b. Verify that the Export task in completed. The Status is Job done.
   c. Logout of the tmweb.
   d. Close the Internet Explorer window.

Windows

In procedure 12, you complete the steps on the Server 2008 ECMEDU01 student system.

Procedure 12:Stop the Rulerunner Server

1. Stop the Datacap Rulerunner Service.
   a. From the Start menu of the Rulerunner Server, select All Programs > IBM Datacap Services > Datacap Rulerunner Manager.
   b. Click Stop.
   c. Verify that the status changes to Stopped.
   d. Close the Rulerunner Manager window.

End of exercise

Lesson 2.2. Configure Datacap Maintenance Manager

Overview

Why is this lesson important?

As an Administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0.1 system.

In this lesson, you configure the Datacap Maintenance Manager, which provides batch task cleanup capability.

Activities

- Exercise 1: Configure and Start Datacap Maintenance Manager, on page 2-20

User accounts

	Type	User ID	Password
	Windows Administrator	Administrator	class

Note

Passwords are always case-sensitive.

Exercise 1: Configure and Start Datacap Maintenance Manager

Introduction

In this lesson, you configure the Datacap Maintenance Manager components, which provide batch task cleanup capability.

Procedures

Windows

In this activity, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 1: Configure Datacap Maintenance Manager Application

A sample Datacap Maintenance Manager application that is named NENU is installed on the Server2008 image in the \\ECMEDU01\Datacap\NENU folder. Instructions exist in the online documentation for creating a NENU application from scratch if a sample is not available. In this procedure, you verify that the application exits and is accessible with Datacap Studio.

1. **Log in to the Windows 7 image as Administrator.**

   User: Administrator
   Password: class

Procedure 2: Check the Database Connection Parameters

1. Click Start > All Programs > IBM Datacap Services > Datacap Application Manager.
2. Select the application to which you want to set the location, for example NENU. The paths display in the fields on the Main tab.
3. Ensure that all workflows are displayed and that all of the paths reflect the correct UNC paths with the Datacap Server name \\ECMEDU01\ rather than C:\. All except for the VScan source folder.

Important

If the parameters for the five database connections are blank, then do procedure 2, step 2 to reconfigure the database connections. If the connections are initialized, then ignore the remainder of procedure 2 and continue at procedure 3.

4. Configure the Database Connection parameters for four databases using the following table.

   Database table

Tab	Variable Name	Database
Main	Lookup database	NENULook
	Fingerprint database	NENUFingerprint
	Export database	Leave Blank
	administration	NENUAdm
	Engine	NENUEng

   a. Click the Main tab.

   b. Click the Ellipsis at the right of the blank database field.

   c. Select Microsoft Access (Jet) from the Database Type list.

   d. Click the Database Ellipsis and browse and select the database.

   e. Network\ECMEDU01\Datacap\NENU\ <database>

   f. Click Open.

5. Verify or Change the Name or IP address field to the name of the Datacap Server without using backslashes to `ECMEDU01`.

6. Close the Datacap Application Manager window.

Troubleshooting

In case, if you are not seeing the Datacap applications listed in Application Manager, or in Datacap Studio, it could be because the client image might have lost the connection to ECMECU01 server. Refer to Section , "System check," on page 2-2 to ping to the server and verify that you are able to access the Datacap folder on the server.

Procedure 3: Set a Batch to the Hold State

1. Log in to tmweb.

   a. Open Internet Explorer.

   b. Click the tmweb-server link in the Favorite bar, then:

   c. Select the Application field: TravelDocs

d. Enter the following values:

   User ID: susan
   Password: class
   Station: **1**.

e. Click Login.

   Datacap Web Client opens to the Operations menu.

2. Verify or set a Batch to the hold state.

   a. Click the Monitor tab.

   b. If there are batches in the hold state, then skip the rest of step 2 and continue at procedure 4.

   c. Click the link under the Batch column for any job in the list.

   d. Select hold from the Status field list.

   e. Click Apply.

      You now have at least one batch in the hold state.

   f. Log out and close the Internet Explorer window.

Procedure 4: Verify that the NENU Application Exists

The Student image is already equipped with a NENU application. In this procedure, you configure it to detect all batches in the hold state and write the results into a log file. The results might also be sent to the Administrator email box in a production environment. On the student images, there is no email system.

1. Use the correct Datacap File.

   Ensure that Datacap Studio is using the global version of the datacap.xml file that contains an entry for the NENU application.

   a. Click Start > All Programs > IBM Datacap Developer Tools > Datacap Studio.

   b. Click Close.

   c. Click the Settings icon in the upper right of the window.

   d. Click the Application service tab to display it.

   e. Set or ensure that the path in the Main Application Management file field is set to: \\ECMEDU01\Datacap\datacap.xml file.

   f. Click OK.

2. Connect to the NENU application.

   a. Click the Connection wizard icon next to the Exit icon at the upper right of the window.

   b. Click the NENU application.

   c. Click Next.

d. Type:

   User ID: susan
   Password: class
   Station: **1**.

e. Click Finish.

f. Verify that the NENU application opens and that you see a NENU and AutoDelete Ruleset.

Procedure 5: Configure the NENU Ruleset

Configure the Ruleset to include the following actions and action parameters.

Note

Note: You need to make three changes to the sample NENU Ruleset actions.

NENU Rule Action table

Action	Parameters
SetServer	**tms**
SetUser	**datacap**
SetPassword	**class**
SetStation	**1**
SetApplication	**TravelDocs**
SetupOpenApplication	
QuerySetStatus	**hold**
ProcessRunSqlQuery	
LogWrite RecordSet	
SetupDisconnectAll	

1. Lock the ruleset.
   a. On the Rulesets tab, click the NENU Ruleset under the NENU Workflow.
   b. Click the Lock/Unlock Ruleset for editing icon  .
2. Set the SetServer parameter.
   a. In the Ruleset pane, expand the NENU ruleset.
   b. Expand Rule1 and expand Function1.
   c. Select the SetServer action.
   d. Edit the server parameter in the properties pane if necessary. or this exercise you leave it set to **tms**.

      Note: The parameter for SetServer should use the name of the server that is specified in the application file traveldocs.app. In the following case, it would be tms, which is the default. You do not need to call this action at all unless you want to use a specific server other than tms.

<k name="tmservers">

<k name="tms" ip="127.0.0.1" port="2402" retry="3"/>

</k>

3. Set the SetUser parameter to datacap.
   a. Click the SetUser action.
   b. Edit the parameter in the properties pane to change it to **`datacap`**.
4. Set the SetPassword parameter to class.
   a. Click the SetPassword action.
   b. Edit the parameter in the properties pane to change it to **`class`**.
5. Set the QuerySetStatus parameter to hold.
   a. Click the QuerySetStatus action.
   b. Edit the server parameter in the properties pane to change it from **`aborted`** to **`hold`**.
6. Lock and Publish the edited Ruleset.
   a. Click  Save changes on the Rulesets tab.
   b. Click  Lock/Unlock ruleset and select the Publish ruleset.

      The orange locked icon changes to blue and unlocked.
7. Verify or configure Document Hierarchy.
   a. Click  Lock DCO for editing on the Document Hierarchy tab to lock the DCO for editing.

      The blue unlocked icon changes to orange and locked.
   b. Expand the top batch level of the DCO and expand the Open node.
   c. Verify that the NENU: Rule1 rule is listed.
   d. If NENU: Rule1 is not present then:
      - Select Rule 1 in the NENU ruleset on the Rulesets tab.
      - Select the NENU Batch node in the Document Hierarchy.
      - Click Add to DCO.
   e. Click  Save changes on the Document Hierarchy tab.
   f. Click  Unlock DCO to unlock the DCO.

      The orange locked icon changes to blue and unlocked.
8. Check that the NENU task profile is configured correctly.
   a. Click Task profiles tab in the upper right pane.
   b. Expand the NENU task profile.
   c. If the NENU task profile already has a reference to the NENU ruleset, then proceed to step 10.
9. Configure the NENU Task Profile.
   a. Click  Lock/Unlock task profiles to lock the Task profiles list for editing.

The blue unlocked icon changes to orange and locked.

b. Click the “Add a new task profile” icon (plus icon) to create a task.

c. Select Custom, enter the name as NENU, and click OK.

The window closes and the new task name is displayed in the Task Profiles tab.

d. Click Save changes to save the Task profiles list.

e. Select the NENU ruleset on the Rulesets tab.

f. Click “Add ruleset to profile”.

g. Click Save changes on the Task Profiles tab.

h. Click Lock/Unlock task profiles to unlock the Task profiles list.

The orange locked icon changes to blue and unlocked.

10. Click Exit to close Datacap Studio.

Procedure 6: Run The NENU Ruleset with Datacap Maintenance Manager

1. Configure NENU with Datacap Maintenance Manager.

a. On the Windows 7 image, click Start > All Programs > IBM Datacap Developer Tools > Datacap Maintenance Manager.

b. Click Create on the Datacap Maintenance Manager.

Datacap Maintenance Manager generates a default settings file.

c. Click in the empty field to the right of the lib label to modify the default settings. Then, either select a value from the selection list, or enter a value. Modify the following NENU options:

Default Setting Options

Option	Value	Description
lib	NENU	Select the name of the NENU application. This application contains the NENU task profile.
tprofile	NENU	Select the name of the NENU/AutoDelete task profile.
action_log_level	0	Select the logging level for action messages; 0 provides maximum information; 2 provides minimum information.
log_override	True	Select True to create a log file; False to append to the existing log file.
log_reflush	False	Select False to ensure that all messages are written to the log even in the case of an exception; runs slower but easier to debug.
service_log	0	Select the logging level for service messages; 0 provides minimum information; 5 provides maximum information.

d. Select the “Place settings file in the batch directory” option. This setting creates a sub folder beneath the Batches folder of the application for the NENU working files.

e. Click Save to generate the settings file.

f. The Settings.xml file is saved in the NENU folder in the Batches folder of the selected application.

g. Click Yes if you get a message that indicates that the settings file exists.

2. Run NENU to test the NENU task profile.

a. Click Run Profile to test the task profile.

A message confirms that the task was completed and instructs you to check the log file.

b. Click OK.

c. Close the Datacap Maintenance Manager window.

3. View the log file.

a. Using Windows Explorer, open the NENU folder under the batches folder of the application \\ecmedu01\Datacap\NENU\batches\NENU_NENU.

b. Open the log file, nenu_rrs.log in WordPad to see the results of the profile run.

c. Scroll down and verify that a record in hold status was found.

d. Find the record that starts with *Running LogWriteRecordSet Action*.

e. Verify that a record with all of the information for the batch in the hold state is written to the log file.

```
12:03:44.514 (0)     t:1A4C p:4AD1D40 Running LogWriteRecordSet
Action...
12:03:44.546 (31)    t:1A4C p:4AD1D40 WriteRecordSet
returned:'<rs:data xmlns:rs="urn:schemas-microsoft-com:rowset">
<z:row pb_batch="20150709.000000" pb_expectpgs="3" pb_ndocs="2"
pb_batchdir="\\ecmedu01\datacap\TravelDocs\batches
\20150709.000000" pb_headertable=" " pb_pagefile="Export.xml"
```

4. Close the log file.

5. Close Windows Explorer.

End of exercise

Lesson 2.3. Configure Datacap Web Services

Overview

Why is this lesson important?

As an Administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0.1 system.

In this lesson, you configure the Datacap support component wTM. The wTM component allows interaction with Datacap through a simple, platform-independent interface (API).

Activities

Exercise 1: Configure Datacap Web Services (wTM), on page 2-28

User accounts

	Type	User ID	Password
	Windows Administrator	Administrator	class

Note

Passwords are always case-sensitive.

Exercise 1: Configure Datacap Web Services (wTM)

Introduction

In this activity, you configure the wTM Web Datacap library that provides the interaction with Datacap through a simple, platform-independent application programming interface.

Procedures

Windows

In this procedure, you complete the steps on the Server 2008 ECMEDU01 student system.

Procedure 1: Share and Set Security Permissions for wTM User

The Datacap user for wTM can be shared with the other web applications; tmweb.net and RV2.

On the Server2008 image, the Permission requirements for the wTM are:

Share Permission on the C:\Datacap folder is Full Control.
Security Permission on the C:\Datacap folder is Read Access.
Security Permission on the C:\Datacap\Application folder is Read Access.

1. Check Share Permissions.
   a. Right-click the C:\Datacap and click Properties.
   b. Click the Sharing tab, click Advanced Sharing and then Permissions.
   c. The datacap user must have Full Control.
   d. The datacap user is a member of the DCAdmins group and the DCAdmins group has Full Control.
   e. Click OK to close the Permissions for Datacap window.
   f. Click OK to close the Advanced Sharing.
2. Check the Datacap folder security.
   a. Click the Security tab.
   b. The datacap user must have at least Read permission. You have given full control permission in a previous exercise.

      The DCAdmins group has Full Control.
   c. Click Close to close the Datacap Properties window.

3. Check the Applications folders security.
   a. Right-click the C:\Datacap\<*application*> and click Properties.

      Check the TravelDocs application folder.

   b. Click the Security tab.
   c. The datacap user must have at least Read permission. You have given full control permission in a previous exercise.

      The DCAdmins group has Full Control.

   d. Click OK to close the TravelDocs Properties window.

      All applications that are processed with the wTM library functions must be set to the same security requirements.

Windows

In procedures 2 - 4, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 2: Configure wTM Web Application

1. From the Windows 7 image, click the Start menu, select Administrative Tools > Internet Information Services (IIS) Manager.
2. In the Connections pane, expand the computer, right-click Sites and select Add Web Site.
   a. Set Site name to wTM. The Application Pool is automatically set to wTM.
   b. Set the Physical path by entering or browsing to the installation folder for wTM. The default location is C:\Datacap\wTM.
   c. Select the IP address of the Web Server and assign a unique port number to **85**.

      Make a note of this IP address. You use it in Procedure 4.

      When Datacap Web and wTM are installed on the same Web Server, Datacap Web does not work unless wTM is assigned a different port number.
3. Click OK to close the Add Web Site dialog.
4. In the Connections pane, select Application Pools.
5. In the Application Pools pane, select the wTM Application Pool.
   a. In the Actions pane, in the Edit Application Pool section, click Advanced Settings.
   b. Ensure that the .NET version is set to v4.0.
   c. Ensure that Enable 32-Bit Applications is set to True.
   d. Ensure that Managed Pipeline Mode is set to Integrated.
   e. Ensure that Start Automatically is set to True.
6. Configure the User Identity.
   a. Click Identity in the Process Model section.

b. Click the ellipsis to the right of the Identity field.

c. In the Application Pool Identity window, select Custom account and click Set.

d. In the Set Credentials window, enter the wTM Datacap/Windows account information:

User name: `administrator`.
Password: `class`
Confirm Password: `class`

e. Click OK.

f. Set Load User Profile to `True`.

g. Click OK.

7. In the Connections pane, select the wTM site.
8. In the Actions pane, under Manage Web Site, click Restart.
9. Verify that Web Server is started.
   a. Click the DCCLIENT node in the Connections pane.
   b. Verify in the Actions pane that the Start status is gray, indicating that it is started.
10. Check that Application Pools are started for wTM.
    a. Expand the Web Server node, DCCLIENT in the Connections pane.
    b. Click Application Pools in the Connections pane.
    c. Click wTM in the Application Pools pane.
    d. Verify that the Application Pools are started in the Actions pane under the Applications Pool Task. Start is gray.
11. Verify that the wTM Web Site is started.
    a. Expand the Sites node in the Connections pane.
    b. Click the wTM Web Site.
    c. Verify that the wTM Web Site is started in the Actions pane under the Manage Web Site heading. Start is gray.

Procedure 3: Ensuring the Required IIS Components are Installed

Internet Information Services (IIS) Manager is still open from the previous procedure.

1. In the Connections pane, expand the Computer and Sites nodes.
   a. Select the wTM website.
   b. In the wTM Home pane (Middle pane), double-click Handler Mappings.
   c. Scroll down, select **svc-ISAPI-4.0_32bit**, and ensure that it is enabled.
2. Configure the Actions pane options.
   a. In the Actions pane, click “Edit Feature Permissions”.
      - Select Read, Script, and Execute.

b. Click OK.
c. In the Actions pane, click Edit, and on the Edit Script Map dialog, click Request Restrictions.
d. On the Request Restrictions dialog, click the Verbs tab.
e. Verify and select All verbs.
f. Click OK, click OK again, and then click Yes.

3. Close the Internet Information Services (IIS) Manager window.

Procedure 4: Validating the wTM Installation

1. In Internet Explorer, enter the following URL for Help page:

   `http://<IP address>:<port number>/ServicewTM.svc/help`

   Example http://10.0.0.2:85/ServicewTM.svc/help

   Note: This IP address comes from Procedure 2 step 2c.
2. Click one of the links in the Method column to display detailed help about the REST request.
3. Close the Internet Explorer window.

End of exercise

Lesson 2.4. Configure Datacap Dashboard

Overview

Why is this lesson important to you?

This lesson provides an overview of how to, configure rulesets to capture performance statistics and how to configure Datacap Dashboard to monitor the performance and efficiency of the Datacap Capture installation.

Objectives

Activities

- Exercise 1: Configure Datacap Dashboard, on page 2-33
- Exercise 2: Monitor system performance with Datacap Dashboard, on page 2-38

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	susan	class

Note

Passwords are always case-sensitive.

Exercise 1: Configure Datacap Dashboard

Introduction

In this activity, you configure Datacap Dashboard for monitoring the Datacap performance for the TravelDocs application.

Procedures

Windows

In procedures 1 - 3, you complete the steps on the Windows 7 DCCLIENT student system.

Procedure 1: Install the Datacap Navigator plug-in

Information

A prerequisite for enabling the Datacap Dashboard in IBM Content Navigator is registering the Datacap Navigator plug-in with IBM Content Navigator. Procedure 1 is the process for registering the Datacap Navigator. This procedure is here for your convenience but it is already done on the student image and this topic is taught in the Datacap Navigator configuration unit.

Review Procedure if you wish and then go on to Procedure 2 to do the Datacap Dashboard configuration.

1. In the student client image, start Content Navigator administration Desktop.
   a. In the Internet Explorer browser, click the “ICN Admin” shortcut.
   b. Enter the following values:

      User ID: `p8admin`
      Password: `IBMFileNetP8`
2. In the Administration view, select “Plug-ins” from the left pane.
3. In the “Plug-ins” tab on the right pane, click “New Plug-in”.
   a. In the “New Plug-in” tab, select the “JAR file path” option and enter the following value: `C:\Datacap\tmweb.java\DatacapWebPlugin.jar`

Hint

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

b. Click Load. The details about the plug-in (Example: Name, version, actions, and Features) are shown.

c. Scroll down and enter the following value for the “Default Application” field: `TravelDocs`

d. Enter the following value for the “Default Datacap wTM URI” field:

`http://ecmedu01:85/ServicewTM.svc`

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

4. Click “Generate Default Desktop” at the end of the page.

   This step creates Datacap Navigator desktops.

5. Click “Save and Close” to save the changes and close the tab.

6. Verify that the plug-in that you created is listed in the Plug-ins tab.

   a. Close the Plug-ins tab.

7. Log out of the Content Navigator administration Desktop and log back in.

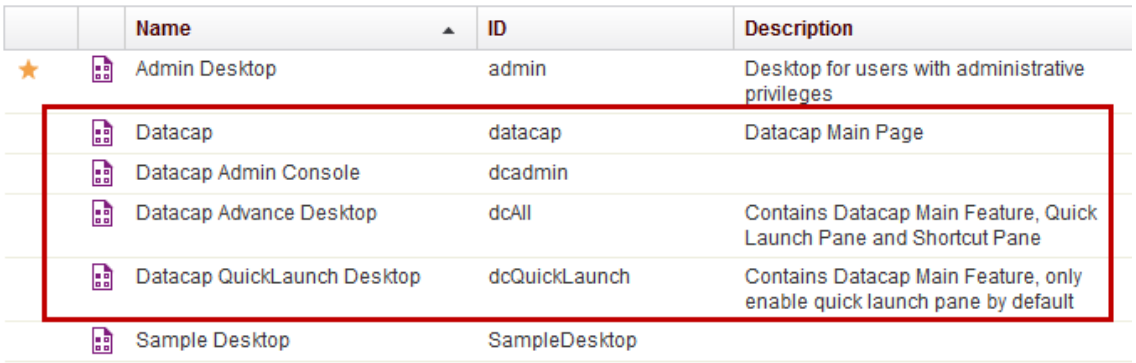
   a. Enter the following values:

   User ID: `p8admin`
   Password: `IBMFileNetP8`

8. Verify that the Datacap Navigator desktops are created.

   a. In the right pane, select “Desktops” tab.

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



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

Procedure 2: Configure Dashboard Feature for dcAdmin desktop

After IBM Datacap Navigator plug-in is registered, Datacap Dashboard is available on two desktops:

- The dcAll desktop.
- The dcAdmin desktop

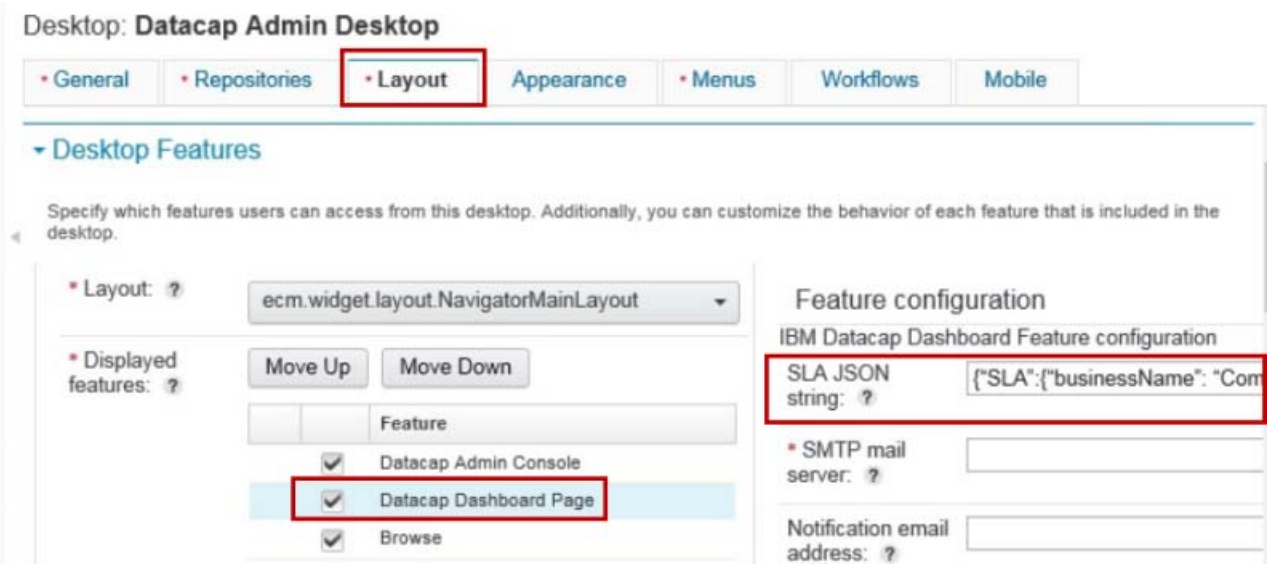
Example SLA JSON string:

```
{“SLA”:{
“businessName”: “Company’s name”,
“appName”: Datacap application name”,
“batchesAbortedInPresetTime”: 20,
“batchesPendingInPresetTime”: 100,
“pageAccurecy”: 97.9,
“fieldAccurecy”: 96.5
}}
```

1. In your client image > Internet Explorer browser, log in to IBM Content Navigator Admin desktop. Use the ICN-Admin browser bookmark.

   URL: http://ecmedu01:9080/navigator/?desktop=admin
   User Name: p8admin
   Password: IBMFileNetP8

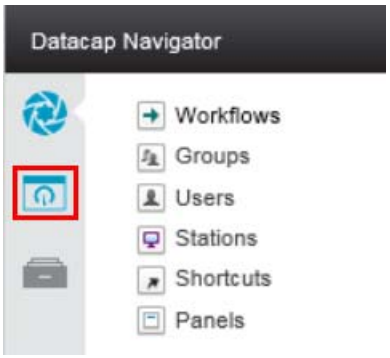
2. Enable Datacap Dashboard.
   a. In the Desktops tab, double-click the desktop with the Dashboard feature, for example: Datacap Admin Desktop.
   b. Click the Layout tab.
   c. Verify or select the “Datacap Dashboard Page” under the “Feature” list.



3. Set the SLA JSON into the “SLA JSON string” field.
   a. In Windows Explorer, go to the C:\DC9-Lab Exercises\Authentication folder.
   b. Open DashboardSLAJSONString.txt file.

   Copy the SLA string from the file and paste it into the “SLA JSON string” fiel
4. Save configuration changes.
   a. Click “Save and Close” to save your configuration changes.
   b. Log out of the IBM Content Navigator Admin desktop.
5. Verify that the Datacap Dashboard is now accessible.
   a. In your client image > Internet Explorer browser, log in to the Datacap Admin Desktop. Use the browser shortcut “DCN-dcAdmin”.

      URL: http://ecmedu01:9080/navigator/?desktop=dcAdmin
      User Name: susan
      Password: class
   b. Verify that you see the Datacap Dashboard icon left navigation pane.



   c. Click the Datacap Dashboard icon and verify that the Dashboard opens.
   d. Log out of the Datacap Admin Desktop and close the browser window.

Procedure 3: Activate Accuracy and performance statistics

1. Activate statistic collection.
   a. In your client image, open Datacap Application Manager. (Double-click the Datacap Application Manager icon on the desktop)

      The Main tab is displayed.
   b. Select TravelDocs in the Left pane.
   c. Scroll down to the bottom of the Main tab view.
   d. Click the Save Statistics check box.
   e. Close the Datacap Application Manager window.
2. Verify that TravelDocs statistical data accumulation rulesets are configured.

The TravelDocs application is released, preconfigured with the essential data tables and rulesets for accumulating performance data.

a. Open Datacap Studio, select the TravelDocs application, and login using `susan/class` station `1`.

b. Click the Task profiles tab the upper right pane.

c. Expand the Profiler task profile and verify that the last ruleset is “Profiler Statistics”.

d. Expand the Export task profile and verify that the last ruleset is “Export Statistics”.

e. Expand the Export Statistics > Batch rule, and SkipNotEnabled function.

f. Verify that the SaveReportStatistics value is tested to determine whether or not to save the statistics.

g. Expand the Init function and verify that the string for the database table that is opened to receive the statistics is the tmengine:cs database string.

h. Expand the ExportBatchStats function and verify that rb_* tables are written with statistical data.

i. Click the Exit icon in the upper right corner to close Datacap Studio.

3. Verify that the required database tables are defined for the TravelDocs application.

a. Double-click the “MDB Plus” icon to view the database tables.

b. Click Run.

c. In MDB Viewer Plus, click File > Open.

d. In the window that opens, select Network > ECMEDU01\TravelDocs\TravelDocsEng.mdb database and click Open.

e. In the “Open Options” window, click OK.

f. Click the “reportBatch” tab and use the scroll bar at the bottom of the window to move to the right.

g. Verify that the following tables are listed:

- rb_FieldAccuracyPct
- rb_FieldAccuracyWeight
- rb_ClassifyAccuracyPct
- rb_ClassifyAccuracyWeight

h. Close the MDB Plus application.

End of exercise

Exercise 2: Monitor system performance with Datacap Dashboard

Introduction

In this activity, you use Datacap Dashboard to monitor the performance of the Datacap Capture system.

Procedures

Procedure 1, "Monitor the system," on page 2-38

Windows

In this procedure, you complete the steps on the Server 2008 ECMEDU01 student system.

Procedure 1: Monitor the system

Use the skills you have learned in previous classes to process an assortment of batches that are used in the following exercise to illustrate how Datacap Dashboard is used to monitor Datacap application performance.

Note

This exercise requires the Datacap Rulerunner to be running. If you did not start Rulerunner before doing the first exercise, then go back to the “Do this first” section at the beginning of lesson and follow the instructions to configure and start Datacap Rulerunner Manager.

1. In your server image, start the Datacap Rulerunner Service.
   a. From the Start menu, select All Programs > IBM Datacap Services > Datacap Rulerunner Manager or use the “Datacap Rulerunner Manager” shortcut on the desktop.
   b. Click Start.
   c. Verify that the status changes to Running.
   d. Close the Rulerunner Manager window.
2. Open the Dashboard feature in Datacap Navigator Admin desktop.
   a. In the Internet Explorer browser, select the DCN-dcAdmin bookmark.

      User name: susan
      Password: class

   b. Click the Dashboard icon in the left icon strip.

3. Use Datacap Desktop to scan 10 batches. Use Rulerunner processes them through to the Verify step.

   As you process each batch look at the Dashboard display, Current Processes view and notice the changes that are occurring.

   a. Double-click the Datacap Desktop icon on the desktop.

   b. Login as `susan/class`.

   c. Select the TravelDocs application.

   d. Scan 10 batches selecting images from C:\Datacap\TravelDocs\images.

      Select different combinations of Car, Flight, and Hotel images. Also select a varying number of images in each batch. Use the following table as a sample.

Batch	Number of pages	Images for scanning
1	1	Car1.tif
2	1	CarRental.tif
3	2	CarRental.tif, Flight1.tif
4	5	Flight1.tif, Flight2.tif, Flight3.tif, Hotel1.tif, Hotel2.tif
5	5	CarRental.tif, Flight1.tif, Flight2.tif, Flight3.tif, Hotel1.tif
6	4	Hotel1.tif, Hotel2.tif, Hotel3.tif, Hotel4.tif
7	3	Car1.tif, CarRental.tif, Flight1.tif
8	4	Flight2.tif, Flight3.tif, Hotel1.tif, Hotel2.tif
9	7	Flight1.tif, Flight2.tif, Flight3.tif, Hotel1.tif, Hotel2.tif, Hotel3.tif, Hotel4.tif
10	7	Car5.tif, Car6.tif, CarRental.tif, Flight1.tif, Flight2.tif, Flight3.tif, Hotel1.tif

   e. Rulerunner processes the batches through the PageID and Profiler tasks and leaves then pending at the Verify task.

   f. Click refresh one or more times until you see all of the batches reach the Verify task.

   g. Look at the Datacap Dashboard display in open Internet Explorer window. You should see:

      - At least 10 Batches in the Summary donut.
      - A Verify donut with at least 10 Batches.

Note

Since you might have run some batches previously in addition to these 10 batches, you might have a slightly different number.

   h. Process all batched through the Verify step manually correcting any errors if necessary.

   i. Rulerunner processes the Export task.

j. Look at the Datacap Dashboard display in the Internet Explorer window. You should see:

- The Verify donut disappears from the display.

4. Stop Rulerunner.
   a. Double-click the Datacap Rulerunner Manager icon on the desktop.
   b. Click Stop.
   c. Close the Datacap Rulerunner Manager window.
5. Use Datacap Desktop only to process 4 more batches.
   a. Use Datacap Desktop to scan 4 more batches. (For example: use “Car1.tif” image and run single page scans).
   b. Process so that you leave one batch on pending at each task. At Page ID, Profiler, Verify, and Export Steps.
6. Observe the results.
   a. You still have the Datacap Dashboard open from step 1.
   b. While you were processing the batches you saw:

- The Summary donut on the Current Processes page change as the total number of batches, Documents, and Pages increased.

   c. When your process is complete and you still have 4 batches active, one at each task.

      In the sample display below there are a total of five active tasks and two at the Verify step.

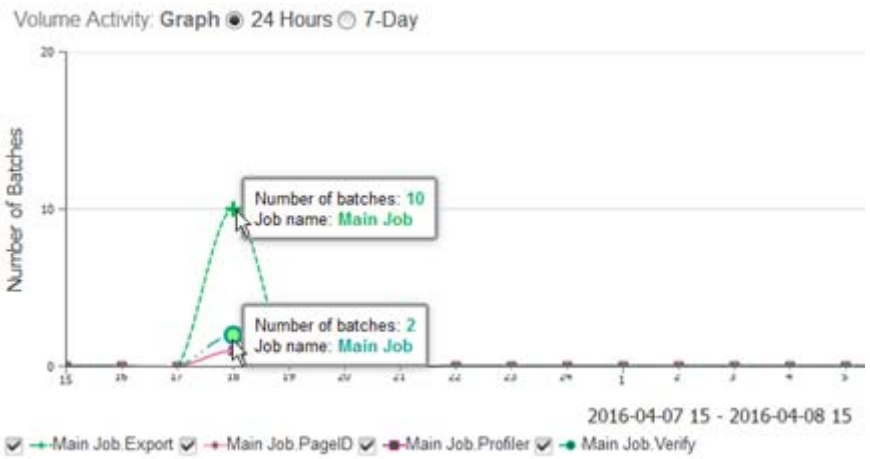
- The Verify task requires human action and is represented by a pink centered donut.
- The three yellow centered donuts represent the task, which can run unattended.
- The colors, on the circumference of the donuts proportionally represent the portion of the total batches that are active.

d. Click the center of the Summary donut.

Task name	Job name	Alarm	Status	Age of batch
Verify	Main Job	alert	pending	20.87
Verify	Main Job	alert	pending	20.82
PageID	Main Job	alert	pending	20.80
Export	Main Job	alert	pending	20.78
Profiler	Main Job	alert	pending	20.78

- There is a record in the data table for each active batch. The age is the hours since the batch was scanned.

e. Click the symbol marking the peak of one of the graphic traces.



- The callout boxes state the maximum number of batches represented by the trace that you selected and it also provides the Job name that is processing the batch. It could be Main Job, Web Job, navigator Job, or any other job name you might have defined in your application.

7. Click the Team Statistics Tab.
8. Click the Accuracy tab.

End of exercise

Appendix A. Optional Component Configuration lesson

Estimated time

01:00

Unit overview

This unit contains these lessons.

Lessons

A.1. Configure Datacap Report Manager

Overview

Why is this lesson important?

As an Administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0.1 system.

In this lesson, you configure the Datacap Report Manager support component, which provides system reports.

Activities

- Exercise 1: Configure and Start Datacap Report Manager, on page A-3

User accounts

Type	User ID	Password
Windows Administrator	Administrator	passw0rd
Datacap users	datacap	class

Note

Passwords are always case-sensitive.

Exercise 1: Configure and Start Datacap Report Manager

Introduction

In this activity, configure the Datacap Report Manager web application for viewing Datacap reports.

Procedures

Windows

For Procedures 1 - 3, you complete the steps on the ECMEDU01 student server system.

Procedure 1: Verify the EnableLDAP Option

1. Open the RV2 web.config file.
   a. In the ECMEDU01 student server system, open Windows Explorer.
   b. Navigate to the C:\Datacap\RV2 folder, and open `web.config` file in Notepad.
2. Verify that EnableLDAP is set correctly for your Authentication method.
   a. Locate and verify the following line:

      <add key="EnableLDAP" value="false"/>

Note

For ADSI and LDAP authentication, EnableLDAP is set to true. This informs Datacap Server Manager service that a blank password is required and a domain name must be automatically pre-appended to the username.

For ADSI and LDAP authentication only, you will change false to true:

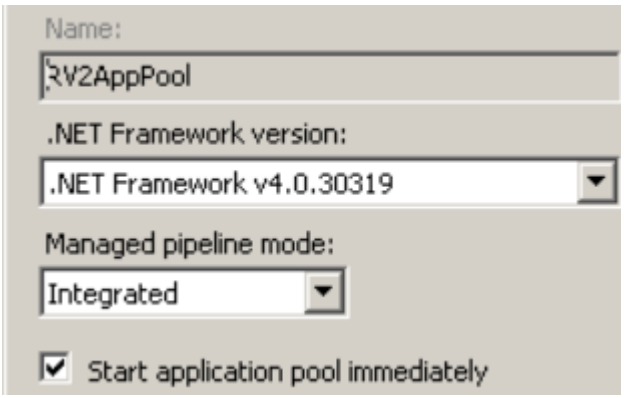
<add key="EnableLDAP" value="true"/>

Because you are using LLLDAP authentication, just verify that EnableLDAP is set to false.

   b. Close Notepad.
   c. Close the Windows Explorer window.

Procedure 2: Set Up RV2 Website (IIS)

1. Configure the Application Pools.
   a. On the ECMEDU01 server, click Start > Administrative Tools > Internet Information Services (IIS) Manager.
   b. In the Connections pane, expand the ECMEDU01 node.
   c. Right-click Applications Pools, select Add Application Pool, and for the Name field type: `RV2AppPool`
   d. Set the .NET Framework version to .NET Framework v4.0.30319 and the Managed pipeline mode to Integrated.
   e. Select the Start application pool immediately option.



   f. Click OK.
2. Set up RV2 website (IIS).
   a. On the Connections pane, expand Sites, and right-click Default Web Site.
   b. Select Add Application... and select or type on the Add Application dialog:

      Alias: `RV2`
      Application pool: `RV2AppPool` (Select)
      Physical path: `C:\Datacap\RV2`

   c. Click OK to close the Add Application dialog.
3. Set Application Pool Defaults.
   a. In the Connections pane, select Application Pools > in Actions pane, select Set Application Pool Defaults.
   b. Ensure that the Microsoft .NET version is set to v4.0.
   c. Ensure that Enable 32-Bit Applications is set to True
   d. In the Process Model section, set Load User Profile to True.
4. Configure the User Credentials.
   a. Click Identity in the Process Model section.
   b. Click the Ellipsis.
   c. Select Custom account.

d. Click Set and enter the RV2 Windows account information:

User name: `Administrator`

Password: `passw0rd` (in stead of letter o, it is zero)

e. Click OK to close the Set Credentials window.

f. Click OK to close the Application Pool Identity window.

5. Click OK to close the Application Pool Defaults window.
6. Set the Unique Name for cookies.
   a. In the Connections pane, expand the computer, and expand Sites. Expand the Default Web Site.
   b. Select the RV2 site, and in the middle pane, double-click Session State.
   c. Under Cookie Settings, change the Name to `RV2`.
   d. Click Apply in the Actions pane.
7. Ensure that Web Server, Application Pool, and Default Web Site are all started.
   a. In the Connections pane, select the Default Web Site.
   b. In the Actions pane, under Manage Web Site, click Restart.
8. Verify that Web Server is started.
   a. Click the ECMEDU01 node in the Connections pane.
   b. Verify in the Actions pane that the Start status is gray, indicating that it is started.
9. Check that Application Pools is started.
   a. Expand the ECMEDU01 in the Connections pane.
   b. Click Application Pools in the Connections pane.
   c. Click RV2AppPool in the Application Pools pane.
   d. Verify that the Application Pools are started in the Actions pane under the Applications Pool Task. Start is gray.
10. Verify that Default Web Site is started.
    a. Expand the Sites node in the Connections pane.
    b. Click Default Web Site.
    c. Verify that the Default Web Site is started in the Actions pane under the Manage Web Site heading. Start is gray.
11. Close the Internet Information Services (IIS) Manager.

Procedure 3: Verify RV2 Login

1. On the ECMEDU01 image, login to RV2.
   a. Open the Internet Explorer browser, and type the URL: `http://ecmedu01/RV2`

b. On the login window type:

User ID: susan
Password: `class`
Station: `1`

c. Click Login.

Hint

If Login is not successful:

- On the ECMEDU01 Server image > Datacap Server Manager > Datacap tab, verify that the correct authentication system is selected (LLDAP).
- In the Service tab, stop and start the Datacap Service and retry the login.

d. Verify that you are logged in to the RV2 web application.

e. Click Logoff to log out of RV2.

f. Close Internet Explorer.

End of exercise

Appendix B. Check Database Connection Strings

Windows

In Procedure 1, you complete the step on the Windows 7 DCCLIENT student system.

Procedure 1: Check the Database Connection Parameters

1. Check the database connection parameters.
   a. Click Start > All Programs > IBM Datacap Services > Datacap Application Manager.
   b. Select the application to which you want to set the location, for example TravelDocs. The paths display in the fields on the Main tab.
2. Configure the database connection parameters for five databases.

Tab	Variable Name	Database
Main	administration	TravelDocsAdm
	Engine	TravelDocsEng
	Lookup database	TravelDocsLook
	Fingerprint database	TravelDocsFingerprint
	Export database	TravelDocsExport

   a. Click the Ellipsis at the right of the field.
   b. Select Microsoft Access (Jet) from the Database Type list.
   c. Click the Database Ellipsis and browse and select the database:

      Network\TMSERVER\Datacap\TravelDocs\ <database>

   d. Click Open.
3. Repeat steps 2.a.i-v for the all databases on the Main tab.

Appendix C. 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 Content Navigator, and 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.

Information

The following components are hosted on WebSphere Server1:

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

Procedure 2: Start Datacap Server

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

   The Taskmaster Server Manager window is shown.
2. Click the Service tab.

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

Check the WebSphere Application Server

Procedures

Procedure 1: Check the WebSphere Application Server

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 C-2.
5. Leave the browser open for the next procedure.

Procedure 2: Check the Content Engine

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

   Log in using User = `p8admin` Password = `IBMFileNetP8`

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

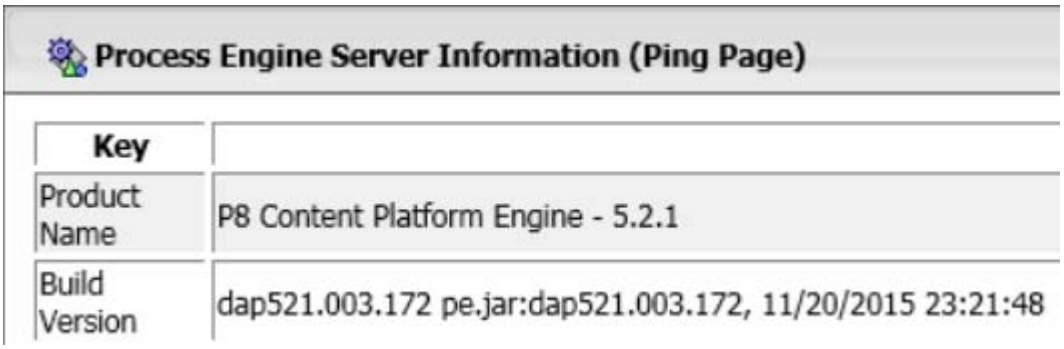
2. If an error page is shown instead, the Content Engine is not running. Start it as directed in the procedure Start student system components, on page C-2.

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.

   .



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 C-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 C-2.

Procedure 5: Check the IBM Navigator

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

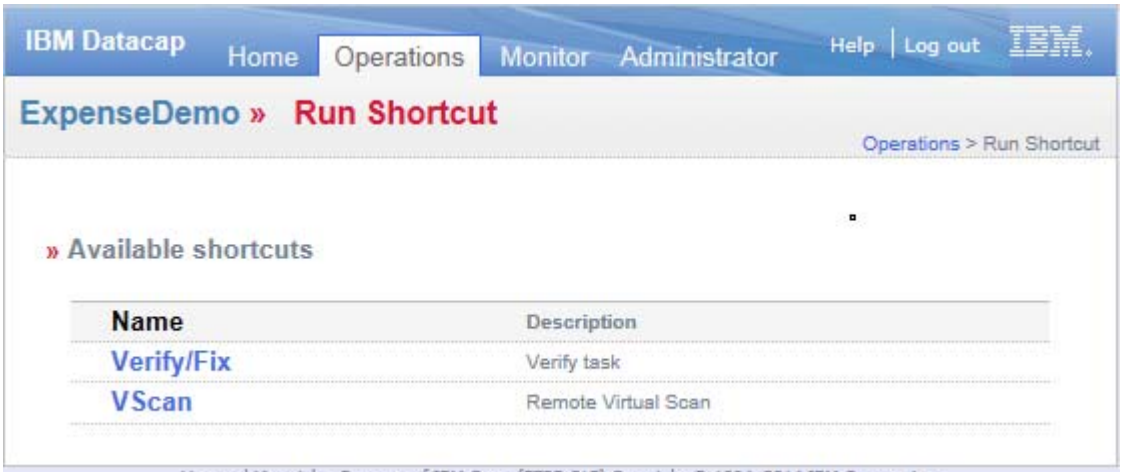
User ID: `admin`

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 C-2

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

Start the Datacap Rulerunner Manager Service

Procedure 1: Start the Rulerunner service

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

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