

# Datacap Smart Export Template Builder

## User Manual

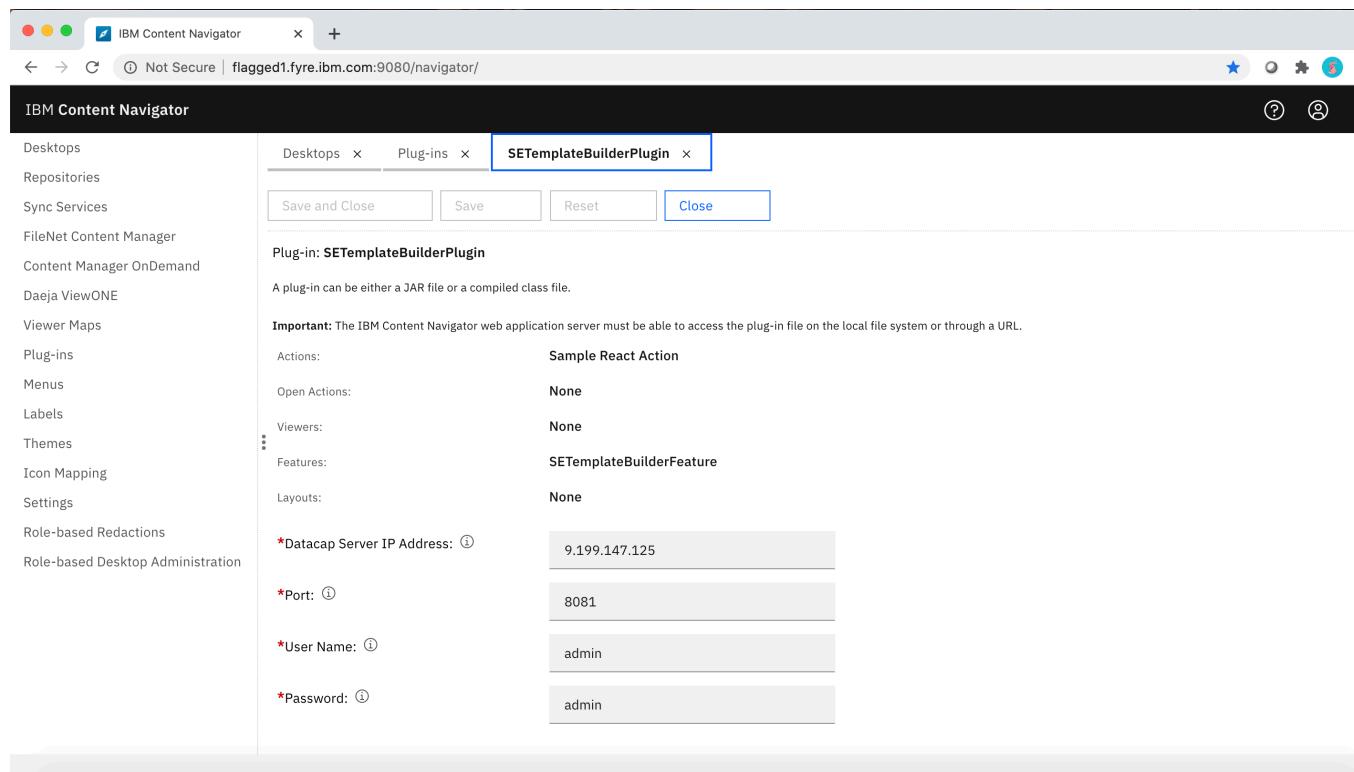
Release: 30 November 2019

Compatible with: SmartExportTemplates Custom Action of IBM Datacap 9.1.7

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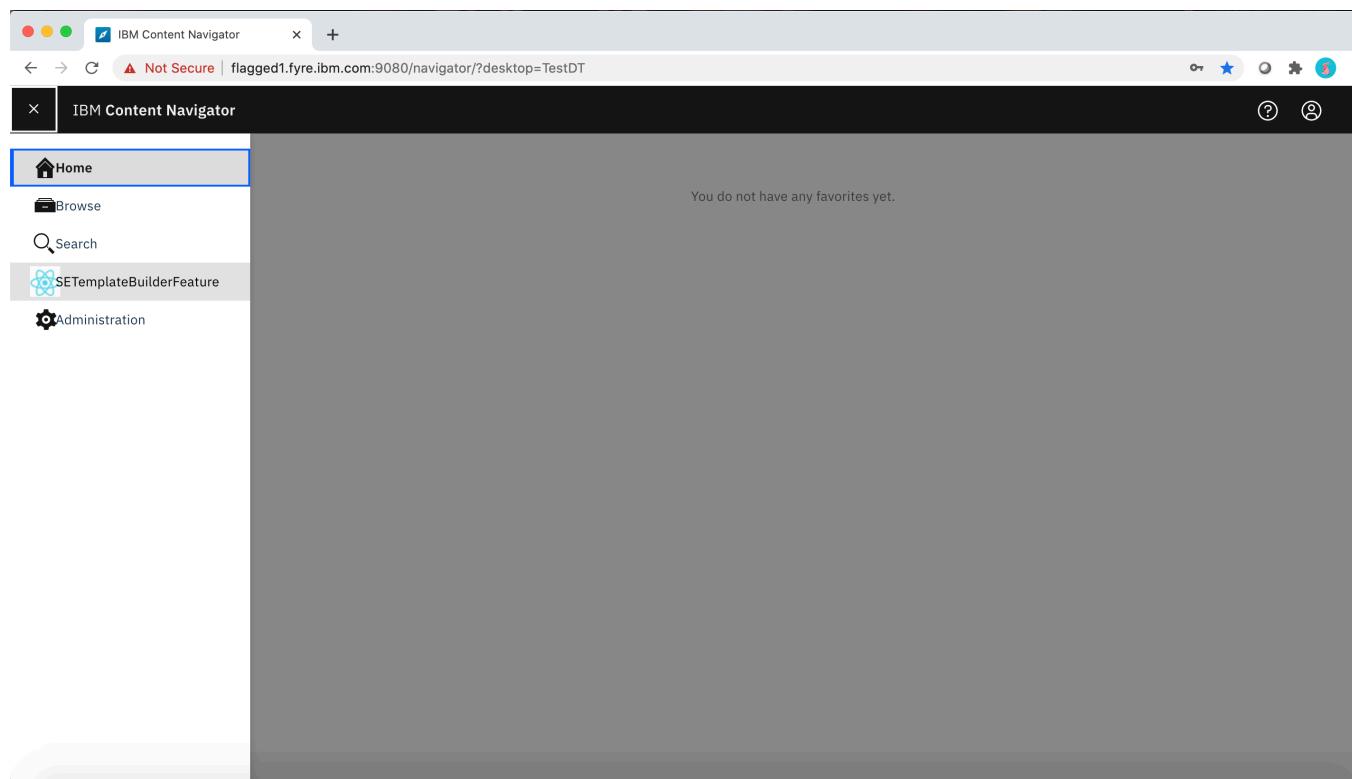
# Datacap Server Configuration

- Log into the IBM Content Manager as the Administrator and create the Smart Export Template Builder Plugin by loading the STemplateBuilderPlugin.jar. Once the jar is loaded, a configuration panel to save the Datacap Server details appears.
- Enter the IP and port number where the Datacap Rest service is hosted along with the Datacap Administrator login credentials in the configuration panel, .
- After the Plugin details are saved, add this plugin to the ICN Desktop in order to use it.



## *Accessing the Plugin*

- Log into the ICN desktop where the plugin is made available and navigate to **SETemplateBuilderPlugin**.



## *Building a Field Level Template*

# **Building a Field Level Template**

**Step 1) Select the Datacap application from where the data should be exported and the level of export to "Field".**

The screenshot shows a web browser window for 'IBM Content Navigator' at the URL 'flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT'. The title bar includes standard OS X window controls (red, yellow, green) and a 'Not Secure' warning. The main header has tabs for 'IBM Content Navigator' and navigation icons. Below the header, a navigation bar has 'Application Details' selected (indicated by a blue underline). Other tabs include 'Output File Details', 'Document Format...', 'Page Format Deta...', 'Field Format Deta...', and 'Review & Download'. The main content area contains two dropdown menus: 'Please select the Datacap Application for selective export.' set to 'TravelDocs' and 'Please select the level the export will be at.' set to 'Field'. A large blue 'Next >>' button is at the bottom.

Please select the Datacap Application for selective export.

Please select the level the export will be at.

[Next >>](#)

# **Building a Field Level Template**

## **Step 2) The following details of output file will be filled in this step -**

- Set Append to file to “False” to generate a separate file for each Field and set it to “True” to generate single output file for all Fields**
- File locale**
- Fill in the text box or/and use the Datacap smart parameters provided in the drop-down menu for the export file/folder name .**
- The file format and the delimiter for separating the data values.**

The screenshot shows the IBM Content Navigator interface with the title bar "IBM Content Navigator". Below the title bar, there is a navigation bar with tabs: Application Details (selected), Output File Details (highlighted in blue), Document Format..., Page Format Data..., Field Format Data..., and Review & Download. The main content area displays the "Output File Details" step. It contains several input fields:

- Append To File?: A dropdown menu showing "True".
- Export File Locale: A dropdown menu showing "en-US".
- File Name: A table with two columns. The first column has a dropdown menu showing "SME". The second column has a dropdown menu showing "ID".
- Output Folder: A table with two columns. The first column has a dropdown menu showing "C:/". The second column has a dropdown menu showing "B.ID".
- Export File Format: A dropdown menu showing "CSV".
- Export File Delimiter: A dropdown menu showing "Comma".

At the bottom of the form are two buttons: "<< Previous" and "Next >>".

# **Building a Field Level Template**

**Step 3) Select the Document type to which the Field to be exported belongs.**

The screenshot shows a web browser window for 'IBM Content Navigator' at the URL <http://flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT>. The page title is 'IBM Content Navigator'. The main content area displays a step-by-step wizard:

- Step 1:** Application Details (radio button selected)
- Step 2:** Output File Details (radio button selected)
- Step 3:** Document Format... (radio button selected)
- Step 4:** Page Format Data... (radio button selected)
- Step 5:** Field Format Data... (radio button selected)
- Step 6:** Review & Download (radio button selected)

A message at the top states: "There are multiple document types associated with this application. Please select the Document Type from which the data needs to be exported." Below this message, two radio buttons are shown:  Flight and  Hotel. At the bottom of the page are two buttons: "<< Previous" and "Next >>".

# **Building a Field Level Template**

**Step 4) Select the Page type to which the Field to be exported belongs.**

The screenshot shows a web browser window for 'IBM Content Navigator' at the URL <https://flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT>. The page title is 'IBM Content Navigator'. The navigation bar includes links for Application Details, Output File Details, Document Format..., Page Format Data... (which is selected and highlighted in blue), Field Format Data..., and Review & Download. Below the navigation bar, a message states: 'There are multiple pages associated to this document type. Please select the page from which the data needs to be exported.' Two radio buttons are present: 'Air\_Ticket' (selected) and 'Page1'. At the bottom are 'Previous' and 'Next >>' buttons.

# **Building a Field Level Template**

## **Step 5) Select the Field to export.**

**If you choose to rename the Field, specify the new name in the Text Field adjacent to the selected field found under “Element Name in Export File” column.**

The screenshot shows the IBM Content Navigator interface with the title bar "IBM Content Navigator" and a URL "Not Secure | flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT". The top navigation bar includes tabs for Application Details, Output File Details, Document Format..., Page Format Data..., Field Format Data... (which is selected), and Review & Download. Below the tabs, a message says: "Please select the field that needs to be exported. If a Field needs to be exported on satisfying specific conditions, add that field to a group and associate the group with the required condition(s.)". A table lists DCO Element Names on the left and their corresponding Element Name on Export File on the right. The "Total\_Cost" row has a radio button selected and its value "Total Cost" is highlighted with a blue border. Navigation buttons at the bottom include "Add Groups", "<< Previous", and "Next >>".

DCO Element Name	Element Name on Export File
<input type="radio"/> Vendor_Logo	Vendor_Logo
<input type="radio"/> Outbound_From	Outbound_From
<input type="radio"/> Outbound_To	Outbound_To
<input type="radio"/> Outbound_Date	Outbound_Date
<input type="radio"/> Return_From	Return_From
<input type="radio"/> Return_To	Return_To
<input type="radio"/> Return_Date	Return_Date
<input type="radio"/> Airfare	Airfare
<input type="radio"/> Taxes	Taxes
<input checked="" type="radio"/> Total_Cost	Total Cost

# **Building a Field Level Template**

**Step 6) Click on Add Groups, and the selected field gets added to the table which would hold the details of the data to be exported.**

**At the Field level, you can add only one group.**

The screenshot shows the IBM Content Navigator interface. On the left, there is a list of DCO Element Names with radio buttons next to them. The 'Total\_Cost' option is selected. To the right, a table lists the corresponding Element Name on the Export File. Below this, a button labeled 'Add Groups' is visible. At the bottom, there is a table with three columns: 'Fields to be Exported', 'Condition(s)', and 'Actions'. The 'Fields to be Exported' column contains 'Total Cost,'. The 'Condition(s)' column contains the placeholder text 'Click on 'Edit' Icon to add condition(s)'. The 'Actions' column contains edit and delete icons. Navigation buttons 'Previous' and 'Next >>' are at the bottom.

DCO Element Name	Element Name on Export File
<input type="radio"/> Vendor_Logo	Vendor_Logo
<input type="radio"/> Outbound_From	Outbound_From
<input type="radio"/> Outbound_To	Outbound_To
<input type="radio"/> Outbound_Date	Outbound_Date
<input type="radio"/> Return_From	Return_From
<input type="radio"/> Return_To	Return_To
<input type="radio"/> Return_Date	Return_Date
<input type="radio"/> Airfare	Airfare
<input type="radio"/> Taxes	Taxes
<input checked="" type="radio"/> Total_Cost	Total Cost

Fields to be Exported	Condition(s)	Actions
Total Cost,	Click on 'Edit' Icon to add condition(s)	

<< Previous Next >>

# Building a Field Level Template

## Step 7) Adding conditions for Conditional Export

- Click on the edit icon found under the action column in the first row of the data table to add conditions
- You can set one or more conditions for export, for the last sub condition select “Blank” as the join operator
- Click on the delete icon to remove the field selected for export.

The screenshot shows the 'IBM Content Navigator' interface with the URL <http://flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT>. On the left, there's a list of fields: Outbound\_To, Outbound\_Date, Return\_From, Return\_To, Return\_Date, Airfare, Taxes, and Total\_Cost. The 'Total\_Cost' field is selected. Below this is a 'Add Groups' button. The main area has three tabs: 'Fields to be Exported', 'Condition(s)', and 'Actions'. The 'Fields to be Exported' tab shows 'Total Cost,' with a note 'Click on 'Edit' Icon to add condition(s)' and an edit icon. The 'Condition(s)' tab shows a table:

Field	Operator	Value	Actions
Total_Cost	Greater Than	100	AND/OR/Blank Blank

Below the table are 'Submit' and 'Next >>' buttons. At the bottom are 'Previous <<' and 'Next >>' buttons.

# **Building a Field Level Template**

**After conditions are added to the field, the data table gets updated with the condition.**

Please select the field that needs to be exported. If a Field needs to be exported on satisfying specific conditions, add that field to a group and associate the group with the required condition(s).

DCO Element Name

- Vendor\_Logo
- Outbound\_From
- Outbound\_To
- Outbound\_Date
- Return\_From
- Return\_To
- Return\_Date
- Airfare
- Taxes
- Total\_Cost

Element Name on Export File

- Vendor\_Logo
- Outbound\_From
- Outbound\_To
- Outbound\_Date
- Return\_From
- Return\_To
- Return\_Date
- Airfare
- Taxes
- Total Cost

Add Groups

Fields to be Exported	Condition(s)	Actions
Total Cost,	Total_Cost Greater Than 100	

<< Previous

Next >>

# **Building a Field Level Template**

**Step 8) Review and download the template in this step.**

The screenshot shows a web browser window for 'IBM Content Navigator' at the URL 'Not Secure | flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT'. The page title is 'IBM Content Navigator'. Below the title bar, there is a navigation menu with tabs: Application Details (selected), Output File Details, Document Format..., Page Format Data..., Field Format Data..., and Review & Download. The main content area is titled 'Review and Download the XML'. It displays a large block of XML code. A 'Show more' button is located in the bottom right corner of the XML preview area. At the bottom right of the page, there is a blue 'Download XML' button.

```
<se:smartExport xmlns:se="https://www.w3.org/2001/XMLSchema">
  <se:appendToFile>true</se:appendToFile>
  <se:locale>en-US</se:locale>
  <se:smartParam>SME</se:smartParam>
  <se:filename>TestDT</se:filename>
  <se:fileext>CSV</se:fileext>
  <se:outputFolder>C:/<se:smartParam>B.ID</se:smartParam>
  <se:outputFolder>
  <se:header>Total Cost<se:comma/>
  <se:if test="[DCO].[Flight].[Air_Ticket].[Total_Cost] GREATER-THAN 100">
    <se:if>
      <se:value select="[DCO].[Flight].[Air_Ticket].[Total_Cost]" />
    </se:if>
  </se:if>
</se:smartExport>
```

## *Building a Page Level Template*

# **Building a Page Level Template**

**Step 1) Select the Datacap application from where the data should be exported and the level of export to "Page".**

The screenshot shows a web browser window titled "IBM Content Navigator" with the URL "Not Secure | flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT". The page has a dark header bar with the title and a light blue navigation bar below it. The navigation bar includes tabs for "Application Details" (which is selected and highlighted in blue), "Output File Details", "Document Format...", "Page Format Data...", "Field Format Data...", and "Review & Download". Below the navigation bar, there are two dropdown menus. The first dropdown, labeled "Please select the Datacap Application for selective export.", contains the option "TravelDocs" which is currently selected. The second dropdown, labeled "Please select the level the export will be at.", contains the option "Page" which is also selected and highlighted with a blue border. At the bottom of the form is a blue "Next >>" button.

# **Building a Page Level Template**

## **Step 2) The following details of output file will be filled in this step -**

- Set Append to file to “False” to generate a separate file for each Document and set it to “True” to generate single output file for all Documents**
- File locale**
- Fill in the text box or/and use the Datacap smart parameters provided in the drop-down menu for the export file/folder name .**
- The file format and the delimiter for separating the data values.**

The screenshot shows the IBM Content Navigator interface with the title bar "IBM Content Navigator". Below the title bar, there is a navigation bar with tabs: Application Details (selected), Output File Details (highlighted in blue), Document Format..., Page Format Data..., Field Format Data..., and Review & Download. The main content area displays the "Output File Details" step. It contains several input fields:

- Append To File? dropdown set to "True"
- Export File Locale dropdown set to "en-US"
- File Name field: SME, ID dropdown set to "ID"
- Output Folder field: C:/, B.ID dropdown set to "B.ID"
- Export File Format dropdown set to "CSV"
- Export File Delimiter dropdown set to "Comma"

At the bottom of the form are two buttons: "<< Previous" and "Next >>".

# ***Building a Page Level Template***

**Step 3) Select the Document type to which the Page to be exported belongs.**

The screenshot shows a web browser window for 'IBM Content Navigator' at the URL <http://flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT>. The page title is 'IBM Content Navigator'. The main content area displays a step-by-step process:

- Step 1:** Application Details (radio button selected)
- Step 2:** Output File Details (radio button selected)
- Step 3:** Document Format... (radio button selected)
- Step 4:** Page Format Data... (radio button selected)
- Step 5:** Field Format Data... (radio button selected)
- Step 6:** Review & Download (radio button selected)

A message at the top states: "There are multiple document types associated with this application. Please select the Document Type from which the data needs to be exported." Below this message, two radio buttons are shown:  Flight and  Hotel. At the bottom of the page are two buttons: "<< Previous" and "Next >>".

# ***Building a Page Level Template***

**Step 4) Select the Page type to which the fields to be exported belong.**

The screenshot shows a web browser window for 'IBM Content Navigator' at the URL <https://flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT>. The page title is 'IBM Content Navigator'. The navigation bar includes links for Application Details, Output File Details, Document Format..., Page Format Data... (which is selected and highlighted in blue), Field Format Data..., and Review & Download. Below the navigation bar, a message states: 'There are multiple pages associated to this document type. Please select the page from which the data needs to be exported.' Two radio buttons are shown: 'Air\_Ticket' (selected) and 'Page1'. At the bottom are 'Previous' and 'Next >>' buttons.

# **Building a Page Level Template**

## **Step 5) Select the Fields to export**

**If you choose to rename a Field, specify the new name in the Text Field adjacent to the selected field found under “Element Name in Export File” column.**

The screenshot shows the 'IBM Content Navigator' interface with the title 'Field Format Data...'. The top navigation bar includes tabs for Application Details, Output File Details, Document Format..., Page Format Data..., Field Format Data... (which is selected), and Review & Download. Below the tabs, a message reads: 'Please select the fields that needs to be exported. If a Field or Group of Fileds need to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s.)'. On the left, a list of DCO Element Names is shown with checkboxes. On the right, the corresponding Element Name on Export File is listed next to each checkbox. The 'Total\_Cost' checkbox is checked and highlighted with a blue border. At the bottom, there are buttons for 'Add Groups', '<< Previous', and 'Next >>'.

DCO Element Name	Element Name on Export File
<input type="checkbox"/> Vendor_Logo	Vendor_Logo
<input type="checkbox"/> Outbound_From	Outbound_From
<input type="checkbox"/> Outbound_To	Outbound_To
<input type="checkbox"/> Outbound_Date	Outbound_Date
<input type="checkbox"/> Return_From	Return_From
<input type="checkbox"/> Return_To	Return_To
<input type="checkbox"/> Return_Date	Return_Date
<input checked="" type="checkbox"/> Airfare	Airfare
<input checked="" type="checkbox"/> Taxes	Tax
<input checked="" type="checkbox"/> Total_Cost	Total Cost

Add Groups

<< Previous

Next >>

# Building a Page Level Template

**Step 6) Click on Add Groups, and the selected fields get added to the table which would hold the details of the data to be exported.**

**Multiple groups can be added by clearing the previously selected fields and selecting a new set of fields.**

The screenshot shows the IBM Content Navigator interface with the title bar "IBM Content Navigator" and a warning "Not Secure". The navigation menu includes Application Details, Output File Details, Document Format..., Page Format Data..., Field Format Data... (which is selected), and Review & Download.

A message at the top states: "Please select the fields that needs to be exported. If a Field or Group of Fileds need to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s)."

On the left, a list of DCO Element Names is shown with checkboxes:

- Vendor\_Logo
- Outbound\_From
- Outbound\_To
- Outbound\_Date
- Return\_From
- Return\_To
- Return\_Date
- Airfare
- Taxes
- Total\_Cost

On the right, a table lists the Element Name on Export File:

Element Name on Export File
Vendor_Logo
Outbound_From
Outbound_To
Outbound_Date
Return_From
Return_To
Return_Date
Airfare
Tax
Total_Cost

A blue button labeled "Add Groups" is visible. Below the table, there is a table with columns: Fields to be Exported, Condition(s), and Actions.

Fields to be Exported	Condition(s)	Actions
Airfare,Tax,Total Cost,	Click on 'Edit' Icon to add condition(s)	

Navigation buttons at the bottom are "Next >>" and "Previous <<".

# **Building a Page Level Template**

## **Multiple groups**

The screenshot shows the IBM Content Navigator interface with the title "Multiple groups". The browser bar indicates "Not Secure" and the URL "flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT". The main navigation bar includes links for Application Details, Output File Details, Document Format..., Page Format Data..., Field Format Data..., and Review & Download.

A message at the top states: "Please select the fields that needs to be exported. If a Field or Group of Fileds need to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s)."

The left sidebar lists DCC Element Names with checkboxes:

- Vendor\_Logo
- Outbound\_From
- Outbound\_To
- Outbound\_Date
- Return\_From
- Return\_To
- Return\_Date
- Airfare
- Taxes
- Total\_Cost

The right sidebar lists Element Names on Export File:

- Vendor\_Logo
- Outbound\_From
- Outbound\_To
- Outbound\_Date
- From
- To
- Return\_Date
- Airfare
- Tax
- Total Cost

A blue button labeled "Add Groups" is visible.

The main content area displays a table with three rows:

Fields to be Exported	Condition(s)	Actions
Airfare,Tax,Total Cost,	Click on 'Edit' Icon to add condition(s)	
To,From,	Click on 'Edit' Icon to add condition(s)	

Navigation buttons at the bottom include "<< Previous" and "Next >>".

# Building a Page Level Template

## Step 7) Adding conditions for Conditional Export

- Click on the edit icon found under the action column in the first row of the data table to add conditions
- You can set one or more conditions for export, for the last sub condition select “Blank” as the join operator
- Click on the delete icon to remove the field selected for export.

The screenshot shows the IBM Content Navigator interface with the following details:

- Header:** IBM Content Navigator, Not Secure, flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT
- Navigation:** Application Details, Output File Details, Document Format..., Page Format Data..., Field Format Data..., Review & Download
- Message:** Please select the fields that needs to be exported. If a Field or Group of Fields need to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s).
- Left Panel (DCO Element Name):** Vendor\_Logo, Outbound\_From, Outbound\_To, Outbound\_Date, Return\_From (checked), Return\_To (checked), Return\_Date, Airfare, Taxes, Total\_Cost.
- Right Panel (Element Name on Export File):** Vendor\_Logo, Outbound\_From, Outbound\_To, Outbound\_Date, From, To, Return\_Date, Airfare, Tax, Total\_Cost.
- Table (Fields to be Exported):**

Fields to be Exported	Condition(s)	Actions
Airfare,Tax,Total Cost,	Click on 'Edit' Icon to add condition(s)	
To,From,	Click on 'Edit' Icon to add condition(s)	
- Conditional Export Configuration:** A table showing two conditions for the 'Total\_Cost' field.

Field	Operator	Value	AND/OR/Blank
Total_Cost	Greater Than	100	AND
Total_Cost	Lesser Than	1000	Blank
- Buttons:** Submit, << Previous, Next >>

# Building a Page Level Template

After conditions are added to the field the data table gets updated with the conditions.

The screenshot shows the IBM Content Navigator interface with the 'Field Format Data...' tab selected. On the left, a list of DCO Element Names is displayed with checkboxes. On the right, a table lists fields to be exported with their corresponding element names and conditions. At the bottom, navigation buttons for 'Previous' and 'Next' are visible.

Please select the fields that needs to be exported. If a Field or Group of Fields need to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s).

DCO Element Name	Element Name on Export File
<input type="checkbox"/> Vendor_Logo	Vendor_Logo
<input type="checkbox"/> Outbound_From	Outbound_From
<input type="checkbox"/> Outbound_To	Outbound_To
<input type="checkbox"/> Outbound_Date	Outbound_Date
<input checked="" type="checkbox"/> Return_From	From
<input checked="" type="checkbox"/> Return_To	To
<input type="checkbox"/> Return_Date	Return_Date
<input type="checkbox"/> Airfare	Airfare
<input type="checkbox"/> Taxes	Tax
<input type="checkbox"/> Total_Cost	Total Cost

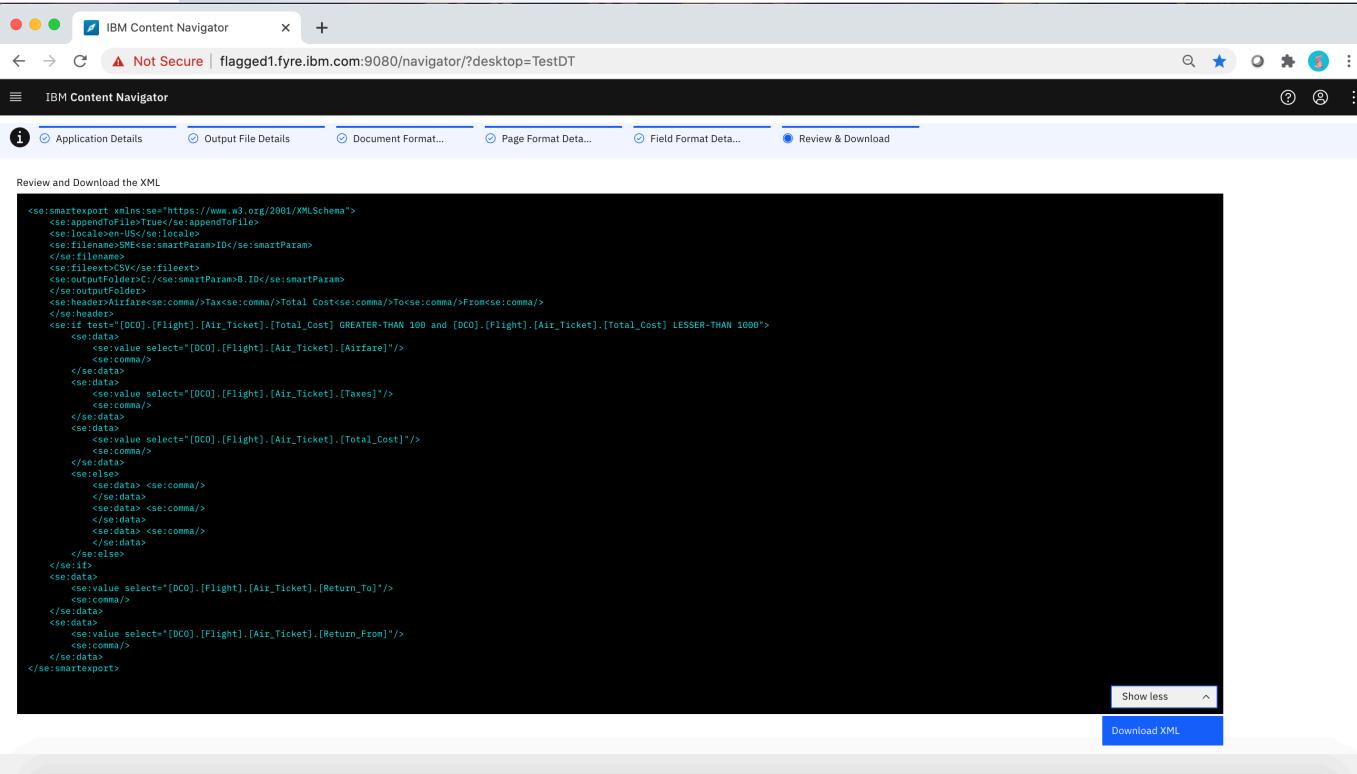
Fields to be Exported	Condition(s)	Actions
Airfare,Tax,Total_Cost,	Total_Cost Greater Than 100 AND Total_Cost Lesser Than 1000	
To,From,	Click on 'Edit' Icon to add condition(s)	

<< Previous

Next >>

# **Building a Page Level Template**

**Step 8) Review and download the template in this step.**



The screenshot shows the IBM Content Navigator interface with the title bar "IBM Content Navigator". Below the title bar is a toolbar with various icons and a search bar. The main navigation bar includes "Application Details", "Output File Details", "Document Format...", "Page Format D...", "Field Format D...", and "Review & Download". The "Review & Download" tab is selected, indicated by a blue underline. Below the tabs, there is a sub-navigation bar with an "i" icon, "Show less", and a "Download XML" button. The main content area displays a large amount of XML code. The code is a smart export configuration, starting with a schema import and defining various parameters like file names, output formats, and header/footer definitions. It includes a conditional section for flight and air ticket costs, and another for return tickets. At the bottom right of the code area, there is a "Show less" button and a "Download XML" button.

```
<se:smartExport xmlns:se="https://www.w3.org/2001/XMLSchema">
<se:appendingOrReplace/>
<se:locale>en-US</se:locale>
<se:filename>SME</se:smartParam>10</se:smartParam>
</se:filename>
<se:fileext>CSV</se:fileext>
<se:outputFormat>c</se:smartParamB.ID</se:smartParam>
</se:outputFormat>
<se:header>Affiliate</se:comma>Tax</se:comma>Total Cost</se:comma>To</se:comma>From</se:comma>
<se:header>
<se:if tests="[DCO].[Flight].[Air_Ticket].[Total_Cost] GREATER-THAN 100 and [DCO].[Flight].[Air_Ticket].[Airfare] LESSER-THAN 1000">
<se:if>
<se:else>
<se:else select="[DCO].[Flight].[Air_Ticket].[Taxes]">
<se:comma/>
<se:else>
<se:else select="[DCO].[Flight].[Air_Ticket].[Total_Cost]">
<se:comma/>
<se:else>
<se:else>
<se:else> <se:comma>
<se:if>
<se:else>
<se:else select="[DCO].[Flight].[Air_Ticket].[Return_To]">
<se:comma/>
<se:else>
<se:else select="[DCO].[Flight].[Air_Ticket].[Return_From]">
<se:comma/>
<se:else>
<se:smartExport>
```

## *Building a Document Level Template*

# ***Building a Document Level Template***

**Step 1) Select the Datacap application from where the data should be exported and the level of export to "Document".**

The screenshot shows a web browser window titled 'IBM Content Navigator' with the URL 'Not Secure | flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT'. The page is titled 'IBM Content Navigator' and has a navigation bar with links for Application Details, Output File Details, Document Format..., Page Format Data..., Field Format Data..., and Review & Download. The main content area contains two dropdown menus: 'Please select the Datacap Application for selective export.' set to 'TravelDocs' and 'Please select the level the export will be at.' set to 'Document'. A blue 'Next >>' button is at the bottom.

# **Building a Document Level Template**

**Step 2) The following details of output file will be filled in this step -**

- Set Append to file to “False” to generate a separate file for each Document and set it to “True” to generate single output file for all Documents**
- File locale**
- Fill in the text box or/and use the Datacap smart parameters provided in the drop-down menu for the export file/folder name .**
- The file format and the delimiter for separating the data values.**

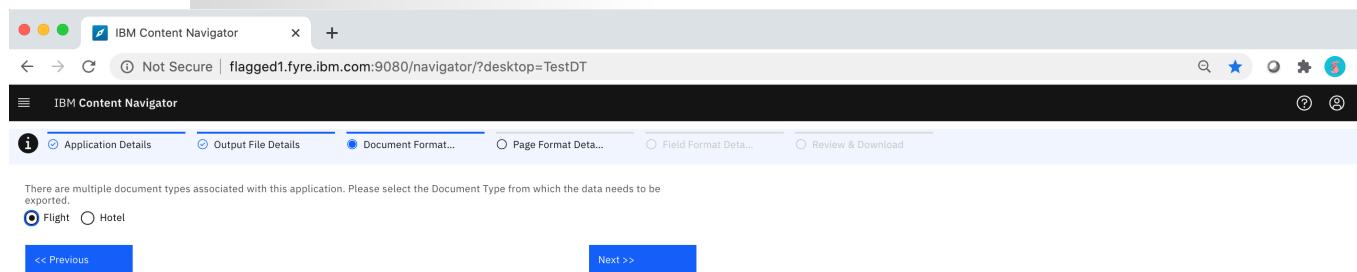
The screenshot shows the IBM Content Navigator interface with the title bar "IBM Content Navigator". Below the title bar, there is a navigation bar with tabs: Application Details (selected), Output File Details (highlighted in blue), Document Format..., Page Format Data..., Field Format Data..., and Review & Download. The main content area displays the "Output File Details" step. It contains several input fields:

- Append To File? dropdown set to "True"
- Export File Locale dropdown set to "en-US"
- File Name table:
  - File Name: SME
  - ID: ID
- Output Folder table:
  - Output Folder: C:/
  - B.ID: B.ID
- Export File Format dropdown set to "CSV"
- Export File Delimiter dropdown set to "Comma"

At the bottom of the form are two buttons: "<< Previous" and "Next >>".

# ***Building a Document Level Template***

**Step 3) Select the Document types from which the data needs be exported.**



# ***Building a Document Level Template***

**Step 4) Select the Pages types from which the fields are to be exported.**

The screenshot shows a web browser window titled "IBM Content Navigator". The URL is "Not Secure | flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT". The page header includes standard browser controls (back, forward, search, etc.) and a "IBM Content Navigator" logo. Below the header is a navigation bar with tabs: "Application Details" (selected), "Output File Details", "Document Format...", "Page Format Data..." (highlighted in blue), and "Field Format Data...". A message at the top states: "There are multiple pages associated to this document type. Please select the pages from which the data needs to be filtered." Two checkboxes are present: "Air\_Ticket" (unchecked) and "Page1" (checked). At the bottom are two buttons: "Previous" and "Next >>".

# **Building a Document Level Template**

**Step 5) Pages selected in the previous step would appear in the Page type drop-down menu. For each of the Page types, select the Fields to export. If you choose to rename a Field, specify the new name in the Text Field adjacent to the selected field found under “Element Name in Export File” column.**

The screenshot shows the 'IBM Content Navigator' interface with the URL <http://flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT>. The page title is 'Field Format Data...'. The left sidebar lists 'Application Details', 'Output File Details', 'Document Format...', 'Page Format Data...', and 'Field Format Data...' (which is selected). Below the sidebar, a note says: 'For each page type, please select the fields that needs to be exported. If a Field or group of fields needs to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s.)'. A 'Page Type:' dropdown is set to 'Air\_Ticket'. On the right, there are two columns: 'DCO Element Name' and 'Element Name on Export File'. Under 'DCO Element Name', checkboxes are listed: Vendor\_Logo, Outbound\_From, Outbound\_To, Outbound\_Date, Return\_From, Return\_To, Return\_Date, Airfare (checked), Taxes (checked), and Total\_Cost (checked). To the right, under 'Element Name on Export File', corresponding text fields are shown: Vendor\_Logo, Outbound\_From, Outbound\_To, Outbound\_Date, Return\_From, Return\_To, Return\_Date, Airfare, Taxes, and Total\_Cost. At the bottom left are buttons for 'Add Groups' and '<< Previous'. At the bottom right is a 'Next >>' button.

# **Building a Document Level Template**

**Step 6) Click on Add Groups, and the selected fields get added to the table which would hold the details of the data to be exported.**

**Multiple groups can be added by clearing the previously selected fields and selecting a new set of fields.**

For each page type, please select the fields that needs to be exported If a Field or group of fields needs to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s).

Page Type :

Air\_Ticket

DCO Element Name	Element Name on Export File
<input type="checkbox"/> Vendor_Logo	Vendor_Logo
<input type="checkbox"/> Outbound_From	Outbound_From
<input type="checkbox"/> Outbound_To	Outbound_To
<input type="checkbox"/> Outbound_Date	Outbound_Date
<input type="checkbox"/> Return_From	Return_From
<input type="checkbox"/> Return_To	Return_To
<input type="checkbox"/> Return_Date	Return_Date
<input checked="" type="checkbox"/> Airfare	Airfare
<input checked="" type="checkbox"/> Taxes	Taxes
<input checked="" type="checkbox"/> Total_Cost	Total_Cost

Add Groups

Fields to be Exported	Condition(s)	Actions
Airfare,Taxes,Total_Cost,	Click on 'Edit' Icon to add condition(s)	

<< Previous

Next >>

# **Building a Document Level Template**

## **Multiple groups**

The screenshot shows the IBM Content Navigator interface with the title "Multiple groups". The browser address bar indicates the URL is <http://flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT>. The page header includes tabs for Application Details, Output File Details, Document Format..., Page Format Data..., Field Format Data... (which is selected), and Review & Download.

A message at the top states: "For each page type, please select the fields that needs to be exported if a Field or group of fields needs to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s)."

The "Page Type:" dropdown is set to "Air\_Ticket". On the left, a list of DCO Element Names is shown with checkboxes next to them. The checked items are "Return\_Date" and "Total\_Cost". To the right, the corresponding Element Names on the Export File are listed:

DCO Element Name	Element Name on Export File
<input type="checkbox"/> Vendor_Logo	Vendor_Logo
<input type="checkbox"/> Outbound_From	Outbound_From
<input type="checkbox"/> Outbound_To	Outbound_To
<input type="checkbox"/> Outbound_Date	Outbound_Date
<input type="checkbox"/> Return_From	From
<input type="checkbox"/> Return_To	To
<input checked="" type="checkbox"/> Return_Date	Travel Date
<input type="checkbox"/> Airfare	Airfare
<input type="checkbox"/> Taxes	Taxes
<input type="checkbox"/> Total_Cost	Total_Cost

A blue button labeled "Add Groups" is visible below the list of element names. The main table area has three columns: "Fields to be Exported", "Condition(s)", and "Actions". The data rows are:

Fields to be Exported	Condition(s)	Actions
Airfare,Taxes,Total_Cost,	Click on 'Edit' Icon to add condition(s)	
From,To,	Click on 'Edit' Icon to add condition(s)	
Travel Date,	Click on 'Edit' Icon to add condition(s)	

At the bottom, there are "Previous" and "Next >>" buttons.

# Building a Document Level Template

## Step 7) Adding conditions for Conditional Export

- Click on the Edit icon found under the action column in the first row of the data table to add conditions

When there is more than one Page Type selected in the step 4, ensure that the right Page Type is selected from the Page Type drop-down menu, to get the desired Fields while adding conditions.

You can set one or more conditions for export, for the last sub condition select “Blank” as the join operator

- Click on the Delete icon to remove the field selected for export.

The screenshot shows the 'Field Format Data...' tab in the IBM Content Navigator. On the left, under 'Page Type' dropdown set to 'Air\_Ticket', a list of fields is shown with checkboxes. The checked fields are 'Return\_Date' (selected), 'Airfare', 'Taxes', and 'Total\_Cost'. Below this is a 'Add Groups' button. To the right, under 'Element Name on Export File', a list of fields is shown in a table:

Element Name on Export File
Vendor_Logo
Outbound_From
Outbound_To
Outbound_Date
From
To
Travel Date
Airfare
Taxes
Total_Cost

Below this is a 'Fields to be Exported' section with a table:

Fields to be Exported	Condition(s)	Actions
Airfare,Taxes,Total_Cost,	Click on 'Edit' Icon to add condition(s)	
To,From,	Click on 'Edit' Icon to add condition(s)	
Travel Date,	Return_Date Greater Than 10/08/1990	

At the bottom, there is a table for defining conditions:

Field	Operator	Value	Actions
Total_Cost	Greater Than	100	AND
Field	Operator	Value	AND/OR/Blank
Total_Cost	Lesser Than	1000	Blank

Buttons at the bottom include 'Submit', '<< Previous', and 'Next >>'.

# **Building a Document Level Template**

**After conditions are added to the field the data table gets updated with the conditions.**

IBM Content Navigator

Not Secure | flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT

IBM Content Navigator

Application Details   Output File Details   Document Format...   Page Format Data...   **Field Format Data...**   Review & Download

For each page type, please select the fields that needs to be exported If a Field or group of fields needs to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s).

Page Type :

Air\_Ticket

DCO Element Name

- Vendor\_Logo
- Outbound\_From
- Outbound\_To
- Outbound\_Date
- Return\_From
- Return\_To
- Return\_Date
- Airfare
- Taxes
- Total\_Cost

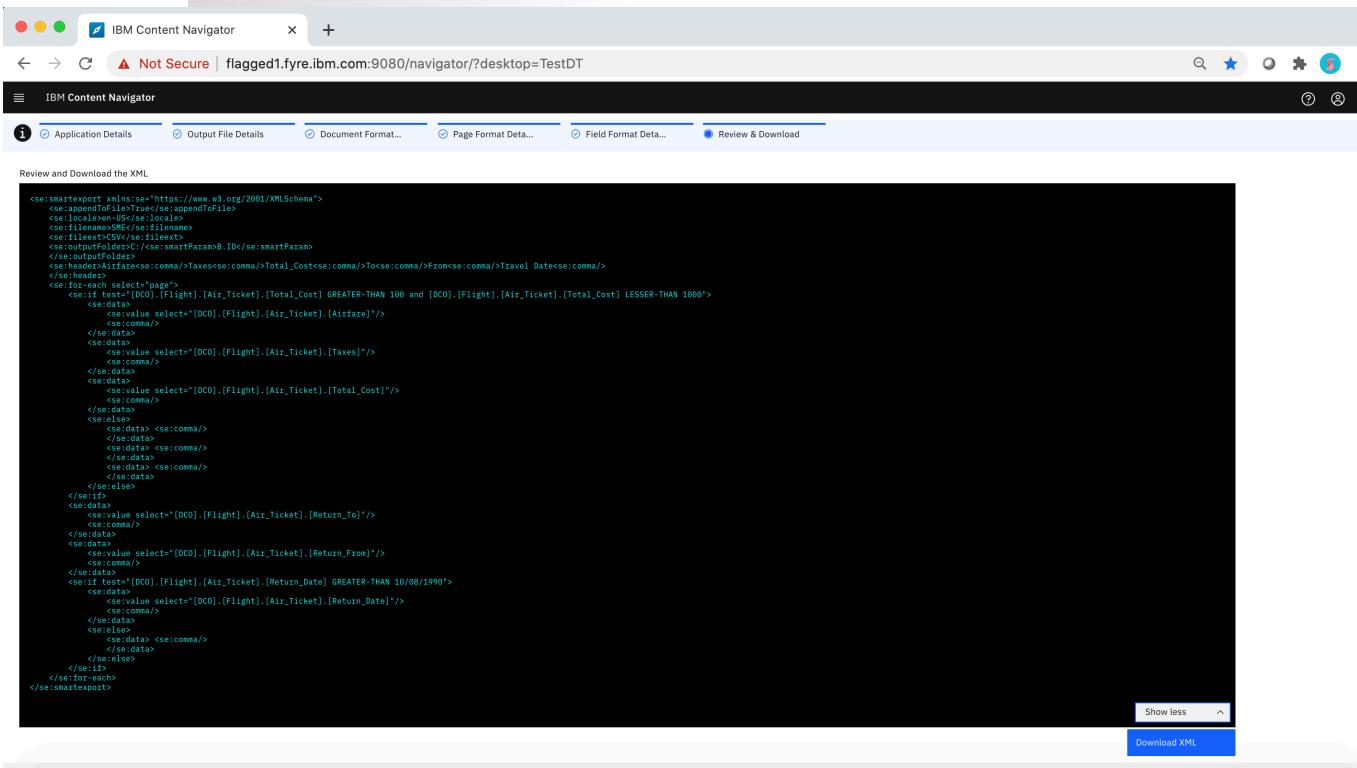
Add Groups

Fields to be Exported	Condition(s)	Actions
Airfare,Taxes,Total_Cost,	Total_Cost Greater Than 100 AND Total_Cost Lesser Than 1000	
From,To,	Click on 'Edit' Icon to add condition(s)	
Travel Date,	Return_Date Greater Than 10/08/1990	

<< Previous      Next >>

# ***Building a Document Level Template***

**Step 8) Review and download the template in this step.**



The screenshot shows the IBM Content Navigator interface with the title bar "IBM Content Navigator" and the URL "Not Secure | flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT". The main content area is titled "Review and Download the XML". It displays a large block of XML code. At the bottom right of the XML area, there are two buttons: "Show less" and "Download XML".

```
<se:smartexport xmlns:se="https://www.w3.org/2001/XMLSchema">
  <se:appendToFile>true</se:appendToFile>
  <se:localize>en-US</se:localize>
  <se:outputFormat>XML</se:outputFormat>
  <se:fileName>C:/se:smartParam8.ID</se:smartParam>
  <se:outputFolder>C:/se:smartParam8.ID</se:smartParam>
  <se:smartParamValues>
    <se:smartParamValue><se:comma>/Taxes<se:comma>/Total_Cost<se:comma>/From<se:comma>/To<se:comma>/Travel Date<se:comma>/</se:smartParamValue>
  </se:smartParamValues>
  <se:header><se:header>
    <se:forEach select="page">
      <se:header><se:header>
        <se:if test="([DOD].[Flight].[Air_Ticket].[Total_Cost] GREATER-THAN 100 and [DOD].[Flight].[Air_Ticket].[Airfare] LESSER-THAN 1000)">
          <se:forEach select="([DOD].[Flight].[Air_Ticket].[Taxes])">
            <se:if>
              <se:forEach select="([DOD].[Flight].[Air_Ticket].[Total_Cost])" type="value">
                <se:comma>
              </se:forEach>
            </se:if>
            <se:forEach select="([DOD].[Flight].[Air_Ticket].[Taxes])" type="value">
              <se:comma>
            </se:forEach>
            <se:forEach select="([DOD].[Flight].[Air_Ticket].[Total_Cost])" type="value">
              <se:comma>
            </se:forEach>
          </se:forEach>
        </se:if>
        <se:else>
          <se:if value="([DOD].[Flight].[Air_Ticket].[Return_To])" type="value">
            <se:comma>
          </se:if>
          <se:if value="([DOD].[Flight].[Air_Ticket].[Return_From])" type="value">
            <se:comma>
          </se:if>
          <se:if test="([DOD].[Flight].[Air_Ticket].[Return_Date] GREATER-THAN 10/08/1990)">
            <se:if value="([DOD].[Flight].[Air_Ticket].[Return_Date])" type="value">
              <se:comma>
            </se:if>
            <se:else>
              <se:if value="([DOD].[Flight].[Air_Ticket].[Return_Date])" type="value">
                <se:comma>
              </se:if>
            </se:else>
          </se:if>
        </se:else>
      </se:forEach>
    </se:forEach>
  </se:header>
</se:smartexport>
```

## *Building a Batch Level Template*

# ***Building a Batch Level Template***

**Step 1) Select the Datacap application from where the data should be exported and the level of export to "Batch".**

The screenshot shows a web browser window titled "IBM Content Navigator" with the URL "Not Secure | flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT". The page has a dark header bar with the title and a light blue navigation bar below it. The navigation bar includes tabs for "Application Details" (which is selected and highlighted in blue), "Output File Details", "Document Format...", "Page Format Deta...", "Field Format Deta...", and "Review & Download". Below the navigation bar, there are two dropdown menus. The first dropdown, labeled "Please select the Datacap Application for selective export.", contains the option "TravelDocs" with a dropdown arrow. The second dropdown, labeled "Please select the level the export will be at.", contains the option "Batch" with a dropdown arrow. A blue rectangular button labeled "Next >>" is located at the bottom right of the form area.

# **Building a Batch Level Template**

**Step 2) The following details of output file will be filled in this step -**

- Append to file – this input will be ignored for batch level**
- File locale**
- Fill in the text box or/and use the Datacap smart parameters provided in the drop-down menu for the export file/folder name .**
- The file format and the delimiter for separating the data values.**

The screenshot shows the IBM Content Navigator interface with the title 'IBM Content Navigator'. The top navigation bar includes tabs for Application Details, Output File Details (which is selected), Document Format..., Page Format Data..., Field Format Data..., and Review & Download. Below the tabs, there are several configuration fields:

Append To File?	True
Export File Locale	en-US
File Name	SME
Output Folder	C:/
Export File Format	CSV
Export File Delimiter	Comma

At the bottom of the form are two buttons: '<< Previous' and 'Next >>'.

# ***Building a Batch Level Template***

**Step 3) Select the Document types from which the data needs to be exported.**

The screenshot shows a web browser window for 'IBM Content Navigator' at the URL <http://flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT>. The page title is 'IBM Content Navigator'. The navigation bar includes links for 'Application Details', 'Output File Details', 'Document Format...', 'Page Format Data...', 'Field Format Data...', and 'Review & Download'. The main content area displays a message: 'There are multiple document types associated with this application. Please select the Document Types for which the data needs to be exported.' Below this message are two checked checkboxes: 'Flight' and 'Hotel'. At the bottom of the page are two buttons: 'Previous' and 'Next >>'.

# **Building a Batch Level Template**

**Step 4) The Document types selected in the previous step will be available in the Document Type drop-down menu. For each of the Document types, select the Page types from which the fields are to be exported.**

IBM Content Navigator

Not Secure | flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT

IBM Content Navigator

Application Details   Output File Details   Document Format...   **Page Format Data...**   Field Format Data...   Review & Download

For each document type, please select the associated pages from which the fields need to be exported.

Document type :

Flight

Air\_Ticket

Page1

<< Previous      Next >>

# **Building a Batch Level Template**

**Step 5) Documents and Pages selected in the previous steps would appear in the Document types and Page types drop-down menus. For each of the Document type, select Page type and the corresponding the Fields to export.**

**If you choose to rename a Field, specify the new name in the Text Field adjacent to the selected field found under “Element Name in Export File” column.**

The screenshot shows the IBM Content Navigator interface with the title bar "IBM Content Navigator" and the URL "flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT". The main navigation bar includes links for Application Details, Output File Details, Document Format..., Page Format Data..., Field Format Data... (which is selected), and Review & Download.

The central content area is titled "For each document type and its associated page types, please select the fields that needs to be exported. If a Field or group of fields need to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition()".

Under "Document Type:", a dropdown menu is set to "Flight". Under "Page Type:", a dropdown menu is set to "Air\_Ticket".

A table lists fields and their corresponding "Element Name on Export File":

DCO Element Name	Element Name on Export File
<input type="checkbox"/> Vendor_Logo	Vendor_Logo
<input type="checkbox"/> Outbound_From	Outbound_From
<input type="checkbox"/> Outbound_To	Outbound_To
<input type="checkbox"/> Outbound_Date	Outbound_Date
<input type="checkbox"/> Return_From	Return_From
<input checked="" type="checkbox"/> Return_To	Return_To
<input checked="" type="checkbox"/> Return_Date	Return_Date
<input type="checkbox"/> Airfare	Airfare
<input type="checkbox"/> Taxes	Taxes
<input type="checkbox"/> Total_Cost	Total_Cost

At the bottom left is a blue button labeled "Add Groups". At the bottom right are buttons for "Next >>" and "<< Previous".

# Building a Batch Level Template

**Step 6) Click on Add Groups, and the selected fields get added to the table which would hold the details of the data to be exported.**

**Multiple groups can be added by clearing the previously selected fields and selecting a new set of fields.**

The screenshot shows the IBM Content Navigator interface with the title bar "IBM Content Navigator". Below the title bar, there are tabs: Application Details (selected), Output File Details, Document Format..., Page Format Data..., Field Format Data... (selected), and Review & Download. The main content area has a heading: "For each document type and its associated page types, please select the fields that needs to be exported. If a Field or group of fields need to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition().". Under "Document Type:", a dropdown menu is set to "Flight". Under "Page Type:", a dropdown menu is set to "Air\_Ticket". On the left, there is a list of DCO Element Names with checkboxes next to them. The checked items are "Return\_To", "Return\_Date", and "Total\_Cost". To the right, there is a list of Element Names on the Export File with corresponding input fields. The checked items in the list are "Vendor\_Logo", "Outbound\_From", "Outbound\_To", "Outbound\_Date", "Return\_From", "Return\_To", "Return\_Date", "Airtare", "Taxes", and "Total\_Cost". Below this, there is a table titled "Fields to be Exported" with columns: Fields to be Exported, Condition(s), and Actions. The table contains one row: "Return\_Date,Return\_To,". A note says "Click on 'Edit' Icon to add condition(s)". At the bottom, there are navigation buttons: "<< Previous" and "Next >>".

# **Building a Batch Level Template**

## **Multiple groups**

IBM Content Navigator

Not Secure | flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT

Application Details   Output File Details   Document Format...   Page Format Data...   **Field Format Data...**   Review & Download

For each document type and its associated page types, please select the fields that needs to be exported. If a Field or group of fields need to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s).

Document Type : Hotel

Page Type : Meals

DCO Element Name

Meals\_Total

Meals\_Grid

Add Groups

Fields to be Exported	Condition(s)	Actions
Return_Date,Return_To,	Click on 'Edit' Icon to add condition(s)	
Meals_Total,	Click on 'Edit' Icon to add condition(s)	

<< Previous

Next >>

# Building a Batch Level Template

## Step 7) Adding conditions for Conditional Export

- Click on the Edit icon found under the action column in the first row of the data table to add conditions

When there is more than one Document and Page Type selected in the steps 3 & 4, ensure that the right Document Type and Page Type is selected from the Document Type and Page Type drop-down menus, to get the desired Fields while adding conditions.

You can set one or more conditions for export, for the last sub condition select “Blank” as the join operator

- Click on the Delete icon to remove the field selected for export.

The screenshot shows the 'IBM Content Navigator' interface with the URL <http://flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT>. The page title is 'IBM Content Navigator'.

**Document Type:** Flight

**Page Type:** Air\_Ticket

**DCO Element Name** (checkboxes): Vendor\_Logo, Outbound\_From, Outbound\_To, Outbound\_Date, Return\_From, **Return\_To** (checked), Return\_Date, Airfare, Taxes, Total\_Cost.

**Element Name on Export File** (list): Vendor\_Logo, Outbound\_From, Outbound\_To, Outbound\_Date, Return\_From, **Return\_To**, Return\_Date, Airfare, Taxes, Total\_Cost.

**Fields to be Exported** (table):

Fields	Condition(s)	Actions
Meals_Total,	Click on 'Edit' Icon to add condition(s)	
Return_To,Return_Date,	Click on 'Edit' Icon to add condition(s)	

**Condition(s)** (table):

Field	Operator	Value	Actions
Total_Cost	Greater Than	100	AND
Total_Cost	Lesser Than	1000	Blank

**Actions**: Submit, Next >, << Previous.

# **Building a Batch Level Template**

**After conditions are added to the field the data table gets updated with the conditions.**

The screenshot shows the IBM Content Navigator interface with the title bar "IBM Content Navigator" and a warning "Not Secure". The URL is "flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT". The top navigation bar includes Application Details, Output File Details, Document Format..., Page Format Data..., Field Format Data... (selected), and Review & Download. Below the navigation bar, there is a message: "For each document type and its associated page types, please select the fields that needs to be exported. If a Field or group of fields need to be exported on satisfying specific conditions, add them to a group and associate the group with the required condition(s)." The "Document Type" dropdown is set to "Flight". The "Page Type" dropdown is set to "Air\_Ticket". On the left, a list of DCO Element Names is shown with checkboxes: Vendor\_Logo, Outbound\_From, Outbound\_To, Outbound\_Date, Return\_From, **Return\_To** (checked), **Return\_Date** (checked), Airfare, Taxes, and Total\_Cost. To the right, a list of Element Names on Export File is shown: Vendor\_Logo, Outbound\_From, Outbound\_To, Outbound\_Date, Return\_From, Return\_To, Return\_Date, Airfare, Taxes, and Total\_Cost. A "Add Groups" button is visible. Below this, a table titled "Fields to be Exported" lists "Meals\_Total," with a note "Click on 'Edit' Icon to add condition(s)" and "Actions" (edit, delete). Another row shows "Return\_To,Return\_Date," with the condition "Total\_Cost Greater Than 100 AND Total\_Cost Lesser Than 1000" and "Actions" (edit, delete). Navigation buttons at the bottom include "<< Previous" and "Next >>".

Fields to be Exported	Condition(s)	Actions
Meals_Total,	Click on 'Edit' Icon to add condition(s)	
Return_To,Return_Date,	Total_Cost Greater Than 100 AND Total_Cost Lesser Than 1000	

# **Building a Batch Level Template**

**Step 8) Review and download the template in this step.**

The screenshot shows the IBM Content Navigator interface. The title bar reads "IBM Content Navigator". The address bar shows the URL "flagged1.fyre.ibm.com:9080/navigator/?desktop=TestDT" with a warning icon indicating "Not Secure". The top navigation bar includes links for Application Details, Output File Details, Document Format..., Page Format Data..., Field Format Data..., and Review & Download (which is currently selected). Below the navigation bar, the main content area is titled "Review and Download the XML". A large block of XML code is displayed, representing the template being reviewed. At the bottom right of the XML area, there are two buttons: "Show less" and "Download XML".

```
<se:smartexport xmlns:se="https://www.w3.org/2001/XMLSchema">
<se:appendToFile>True</se:appendToFile>
<se:locale>en-US</se:locale>
<se:filename>SMC</se:filename>
<se:fileext>CSV</se:fileext>
<se:outputFolder>C:/</se:outputFolder>
<se:header>Meals_Total<se:comma/>Return_To<se:comma/>Return_Date<se:comma/>
</se:header>
<se:for-each select="Document">
<se:data>
<se:newLine/>
</se:data>
<se:if test="([DCO].[Flight].[Air_Ticket].[Total_Cost] GREATER-THAN 100 and [DCO].[Flight].[Air_Ticket].[Total_Cost] LESSER-THAN 1000)">
<se:data>
<se:value select="[DCO].[Hotel].[Meals].[Meals_Total]" />
<se:comma/>
</se:data>
<se:else>
<se:if test="([DCO].[Flight].[Air_Ticket].[Return_To])">
<se:data>
<se:value select="([DCO].[Flight].[Air_Ticket].[Return_To])" />
<se:comma/>
</se:data>
<se:else>
<se:if test="([DCO].[Flight].[Air_Ticket].[Return_Date])">
<se:data>
<se:value select="([DCO].[Flight].[Air_Ticket].[Return_Date])" />
<se:comma/>
</se:data>
<se:else>
<se:if test="([DCO].[Flight].[Air_Ticket].[Return_To])">
<se:comma/>
<se:else>
<se:if test="([DCO].[Flight].[Air_Ticket].[Return_Date])">
<se:comma/>
</se:if>
</se:else>
</se:if>
</se:for-each>
</se:smartexport>
```

Thank You