

Course Exercises Guide

IBM Datacap 9.0.1 Configuration & Administration

Course code WF262 / ZF262 ERC 1.0



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Unit 1. Introduction to Datacap

Estimated time

07:00 hours

Unit overview

This unit contains these lessons.

Lessons

[Lesson 1.1, "Datacap overview,"](#) on page 1-3

[Lesson 1.2, "Datacap process,"](#) on page 1-5

[Lesson 1.3, "Role-based Datacap clients,"](#) on page 1-7

[Lesson 1.4, "Architecture configurations,"](#) on page 1-9

[Lesson 1.5, "Architecture components,"](#) on page 1-11

[Lesson 1.6, "Datacap Desktop,"](#) on page 1-14

[Lesson 1.7, "Application design,"](#) on page 1-18

[Lesson 1.8, "Introduction to Datacap Navigator,"](#) on page 1-27

[Lesson 1.9, "Datacap web client \(Optional\),"](#) on page 1-40

Requirements

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

Do this first



Important

If your student system contains two VMWare images, for this course, use the Server image for all the lab exercises.

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

Type	User ID	Password
Operating system	Administrator	passw0rd

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

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

System check

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

Use procedures in Appendix A to check the following components:

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

Lesson 1.1. Datacap overview

Overview

Why is this lesson important to you?

This lesson provides an overview of the business solution that IBM Datacap provides, and its capabilities.

Activities

- [Quiz 1: Datacap overview](#), on page 1-4

Quiz 1: Datacap overview

For each question, indicate the correct answer or mark the statement True or False.

1. Datacap supports both structured and unstructured documents.

True or False

2. Which of the following descriptions apply to IBM Datacap? Select more than one option. Circle all that apply.
 - a. Automates capturing documents and the extraction of appropriate data.
 - b. Improves efficiency and optimizes business processes.
 - c. Supports compliance and Risk mitigation.
 - d. Reduces costs and speeds up the response.
 - e. Improves customer service.



Note

Refer to [Appendix , "Lesson 1.1. Datacap overview: Quiz,"](#) on page 1-46 for answer keys to the questions.

Lesson 1.2. Datacap process

Overview

Why is this lesson important to you?

This lesson provides an overview of Datacap process.

Activities

- [Quiz 1: Datacap process](#), on page 1-6

Quiz 1: Datacap process

For each question, indicate the correct answer or mark the statement True or False.

1. The Scanners and Multi-Functional Devices input channels support which of the following file types? Select more than one option. Circle all that apply.
 - a. TIFF
 - b. JPEG
 - c. TXT
 - d. HTML
 - e. PDF
 - f. DOCX
 - g. ZIP
2. Both one- and two-dimensional Barcodes are used for page recognition.

True or False

3. Datacap captured documents and data can be exported to content repositories or can be used in applications.

True or False

4. Which of the following items are Datacap page identification methods? Select more than one option. Circle all that apply.
 - a. Keyword
 - b. Batch Process
 - c. Pattern recognition
 - d. Fingerprint
 - e. Document export
 - f. Input channel



Note

Refer to [Appendix , "Lesson 1.2. Datacap process: Quiz,"](#) on page 1-47 for answer keys to the questions.

Lesson 1.3. Role-based Datacap clients

Overview

Why is this lesson important to you?

This lesson provides an overview of different Datacap clients for different business roles.

Activities

- [Quiz 1: Role-based Datacap clients](#), on page 1-8

Quiz 1: Role-based Datacap clients

For each question, indicate the correct answer or mark the statement True or False.

1. Which one of the following items is not a Datacap client for business users to process a batch?
 - a. Datacap Navigator
 - b. Datacap Mobile
 - c. Datacap Desktop
 - d. Datacap FastDoc
 - e. Datacap Studio
2. Datacap FastDoc can be used to rapidly configure the Datacap applications and as a client to scan and verify the documents.

True or False



Note

Refer to [Appendix , "Lesson 1.3. Role-based Datacap clients: Quiz,"](#) on page 1-48 for answer keys to the questions.

Lesson 1.4. Architecture configurations

Overview

Why is this lesson important to you?

As a Datacap business analyst, application builder, or administrator you are involved in the configuring or maintaining your Datacap Capture system.

To do these tasks effectively, you must be familiar with the Datacap system components and architecture of the configuration variations for a Datacap Capture system.

Activities

- [Quiz 1: Identify architecture configuration](#), on page 1-10

Quiz 1: Identify architecture configuration

For each question, indicate the correct answer or mark the statement True or False.

1. Many production Datacap installations can be configured with a Single system configuration.

True or False

2. The most efficient and cost effective Datacap installations are client/server configurations where all software components are installed on dedicated servers.

True or False

3. Most production Datacap systems have some Datacap components that are installed on dedicated systems and some components on shared systems.

True or False

4. Consider the terms “Centralized Deployment” and “Distributed deployment”. Which of the following statements is correct.
 - a. Centralized and Distributed refer to how Datacap components are deployed across servers in a Datacap configuration.
 - b. Centralized and Distributed refer to geographic location of Datacap services and tasks.
5. Consider the scenario where all of the Datacap services are provided by servers that are in a single-server room. Scanning and verification tasks are done from a workstation or scanning stations throughout multiple buildings at the same physical address and all connected to the same LAN. What is the classification for this scenario?
 - a. Centralized.
 - b. Decentralized.
6. Consider the scenario where all of the Datacap servers are at one physical location. Scanning and verification tasks are done from the location and from remote locations that are connected over the Internet. What is the classification for this scenario?
 - a. Centralized.
 - b. Decentralized.



Note

Refer to [Appendix , "Lesson 1.4. Identify architecture configuration: Quiz,"](#) on page 1-49 for answer keys to the questions.

Lesson 1.5. Architecture components

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system and communicate solution details to the solution architect, administrator, and users.

To do these tasks effectively, you must be familiar with the Datacap system components and architecture of the configuration variations for a Datacap Capture system.

Activities

- [Quiz 1: Identify architecture components](#), on page 1-12

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin



Note

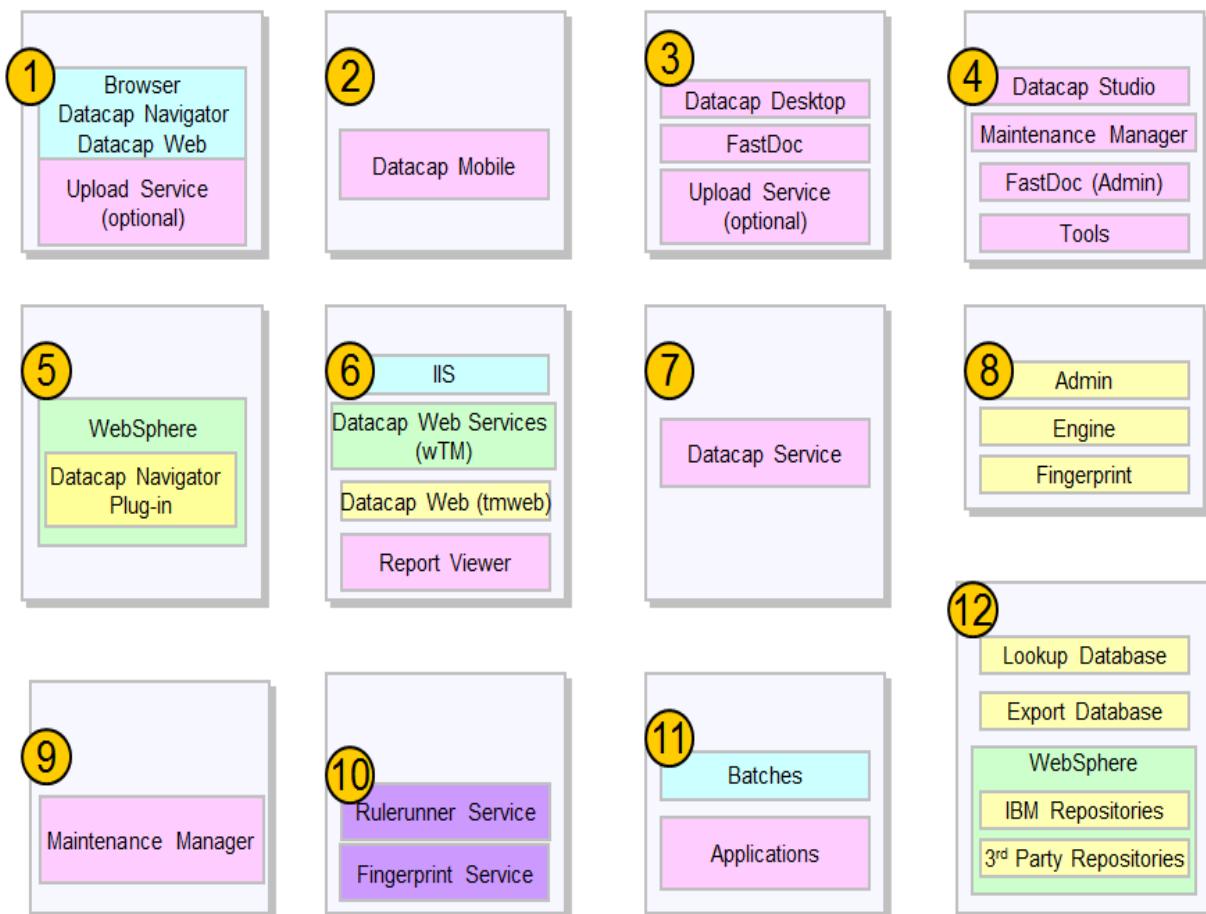
Passwords are always case-sensitive.

Quiz 1: Identify architecture components

In the following table, enter the number that corresponds to the Datacap component name from the following Datacap system architecture diagram.

Number	Datacap component name	Number	Datacap component name
	Developer Workstation		Web Client Workstation
	Datacap Navigator Server		Datacap Web Server
	Database Server		Maintenance Manager Server
	Datacap Client Workstation		Mobile Device
	File Server		Datacap Server
	Rulerunner Server and Fingerprint Services Server		External Systems

Diagram of Datacap system architecture.



Note

Refer to [Appendix , "Lesson 1.5. Identify architecture components: Quiz,"](#) on page 1-50 for answer keys to the questions.

Lesson 1.6. Datacap Desktop

Overview

Why is this lesson important to you?

As a Datacap business analyst, you create capture workflows that are processed with the Datacap Desktop Client.

To do these tasks effectively, you must be familiar with the Datacap Desktop client.

Activities

- [Exercise 1: Explore the Datacap Desktop interface](#), on page 1-15

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin



Note

Passwords are always case-sensitive.

Exercise 1: Explore the Datacap Desktop interface

Introduction

In this activity, you open Datacap Desktop, and explore the client user interface.

Procedures

[Procedure 1, "Open the Datacap Desktop," on page 1-15](#)

[Procedure 2, "Explore the Monitor view," on page 1-16](#)

[Procedure 3, "View Batch process shortcuts," on page 1-17](#)

If for any reason the image was restarted or the WebSphere Server and the Datacap Manager server are not running, follow the instructions at the beginning of the unit under the heading “Do this first” to restart these services.

Procedure 1: Open the Datacap Desktop

1. Log in to Datacap Desktop.
 - a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop.
You can also use the “Datacap Desktop” shortcut on the Windows desktop.
 - b. Enter the following values for the authentication fields:
 - User ID: admin
 - Password: admin
 - Station ID: 1
 - c. Click Start.
2. Select an Application to process.
 - a. From the upper left, click the list under “Applications”, and select an application to view.
Example: ExpenseDemo



Troubleshooting

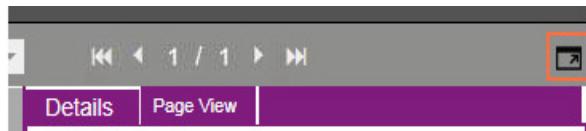
Expense8 application is not configured for this lesson. You can select all applications except Expense8.

-
3. Observe the “Task Shortcuts” in the left pane.
 - a. Notice that the “All” and “Background” shortcuts are visible.
 - b. Select different applications from the list.
 - c. Notice that the rest of the shortcuts vary based on what Tasks are defined in the application.

Procedure 2: Explore the Monitor view

In this procedure, you explore the Monitor view of the Datacap Desktop.

1. Select the `ExpenseDemo` Application.
 - a. Click the “All” shortcut from the left pane.
 - b. In the right pane, a list of batches for the selected application is shown.
 - c. It provides a Monitor view for the batches. You can customize this view.
2. The “Status” column shows the status for a task as an icon, and the “Task” column specifies the task at which the batch is currently pending.
 - a. Hover over the status icon in the table to see the status name. Example: pending or hold.
3. Select (single click) a batch in the middle pane to preview.
 - a. The details for the batch are shown in the rightmost pane.



- b. The preview has two tabs: Details and Page View.
- c. Select each tab and check the display.

Resize or collapse the preview pane with the control at the upper right of the pane.



Note

If you double-click the item, the item gets processed.

4. Adjust the column size and position.
 - a. Drag the individual column by header to change its relative position in the table.
 - b. Click a column header to sort by that column.
5. Specify which columns to show and clear the columns that you want to hide.
 - a. Click the “Select Columns” list.
 - b. Clear the following columns: “DCO File” and “Task Time”.
 - c. Verify that the columns that you cleared are not visible.
6. Filter the list with the filter criteria.
 - a. Select a value for the “Filter” field (Example: Queue ID).
 - b. Enter a value that is available in Queue ID column, (Example: 177) in the “By” field. Then, press Enter.
 - c. Check that only one item with the specified Queue ID is shown.
 - d. Optionally, test another criterion (Task = Verify).

Procedure 3: View Batch process shortcuts

1. Select the ExpenseDemo Application to process.
 - a. From the upper left, click the list under “Applications”, and select an application to view.
Example: ExpenseDemo
2. Select “VScan” from the left pane.
 - a. A new batch is opened, and you are prompted to select images to scan.
 - b. Scroll down and click Cancel to go back to the main page.
 - c. Click OK when you get the message that the Batch is canceled.
 - d. Click Stop to stay on the main page.
3. Leave the Datacap Desktop window for the next lesson.



Note

You are going to process a batch in Datacap Desktop in the Application Design lesson.

Lesson 1.7. Application design

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system and communicate solution details to the solution architect, administrator, and users.

To do these tasks effectively, you must be familiar with the design principles for the Datacap Application and how to process a batch.

Activities

- [Exercise 1: Scan and process a batch](#), on page 1-19

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap Desktop	admin	admin



Note

Passwords are always case-sensitive.

Exercise 1: Scan and process a batch

Introduction

This activity gives you the knowledge to Process a document batch in Datacap Desktop client.

Procedures

[Procedure 1, "Run the VScan Task," on page 1-19](#)

[Procedure 2, "Run Profiler Task," on page 1-21](#)

[Procedure 3, "Review the Profiler Task Output," on page 1-21](#)

[Procedure 4, "Run the Verify Task," on page 1-22](#)

[Procedure 5, "Review the Verify Task Output," on page 1-22](#)

[Procedure 6, "Run the Export Task," on page 1-23](#)

Procedure 1: Run the VScan Task

The task in this procedure completes the page input.

1. If the Datacap Desktop is already opened from the previous lesson, skip to step 3.
2. Log in to Datacap Desktop.
 - a. Click Start > Programs > IBM Datacap Clients > Datacap Desktop.
 - b. Enter the following values for the authentication fields:

User ID: admin

Password: admin

Station ID: 1
 - c. Click Start.
3. Select an Application to process.
 - a. Select ExpenseDemo from the Applications list at the top of the left panel.
4. Scan a batch.
 - a. Select “VScan” from the Shortcut list.
 - b. Click the “Browse for Files to import” icon in the top of the middle pane.



- c. Go to C:\DC9-Lab Exercises\Expense
- d. Select the car1.tif image and click Open.

- e. Clear the “Scan multiple images” option.



Note

If you select only one image, and select the “Scan multiple images” option (“expected”=0), it scans all of the images in the folder. If you select multiple images, the “Scan multiple images” option is selected automatically. The expected field is set to the number of the images that you selected.

- f. Click Scan.
- g. Verify that the image details are listed in the “Batch View” on the rightmost pane.
- h. The image is shown in the “Image View” on the leftmost pane.
5. Complete the batch scan.
 - a. Scroll down and click Submit.
 - b. Click OK to acknowledge the message that the Batch is completed.
6. Click Stop to stay on the main page.
 - a. Leave the Datacap Desktop open for the other procedures.

Review the Scan Task Output

7. View results in the Batches folder:
 - a. Open Windows Explorer, go to the batches folder C:\Datacap\ExpenseDemo\batches.
 - b. Verify that the batch that you scanned created a folder with a name that has today’s date in this format: <date.00000N> where N is a number.
Example: 20150105.00000N
8. Check the VScan.xml file for the <date.00000N> batch.
 - a. Open the <date.00000N> batch folder.
 - b. Double-click the `VScan.xml` file to open it in a browser.
 - c. Click “Yes”, if you are prompted to allow the scripts to run.
 - d. Verify that the page you scanned is identified.
 - The Batch Type is “Expenses”.
 - The Document Type is not set yet.
 - The page type is “Other”.
 - e. Close the browser tab.

Procedure 2: Run Profiler Task

The task in this procedure completes the page identification and document assembly.

1. Click the “All” shortcut from the Task Shortcut list in Datacap Desktop.
 - a. Select the batch that you created with today’s date and time. The Task name is “Profiler”.
 - b. Double-click the batch to process it.
 - c. Click OK to acknowledge the message that the Batch is finished.
2. The “All” shortcut is already selected. Verify that your batch is moved to “Verify” task.
3. Leave the Datacap Desktop open for the other procedures.



Note

To run the “Profiler” task for all the pending batches, click the “Profiler” shortcut from the Task shortcut list. It automatically processes the pending batches. The user has options to stop a particular batch or to continue to process each of the next pending batches.

Procedure 3: Review the Profiler Task Output

1. Open Windows Explorer and go to the C:\Datacap\ExpenseDemo\batches folder.
2. Check the Profiler.xml file for the <date.00000N> batch.
 - a. Open the <date.00000N> batch folder.
 - b. Double-click the Profiler.xml file to open it in a browser.
 - c. Click “Yes”, if you are prompted to allow the scripts to run.
3. Verify that the page type is identified as Rental_Agreement.
4. Verify that the document type is identified as Car for the Rental_Agreement page.

B	20150105.000002
	TYPE : Expenses
	STATUS : 0
	ScanOperator : admin
	ScanStation : 1
D	20150105.000002.01
	TYPE : Car
	STATUS : 0
P	TM000001
	TYPE : Rental_Agreement
	STATUS : 0

5. Close the browser tab.

Procedure 4: Run the Verify Task

The task in this procedure completes the data validation and verification.

1. Click the “All” shortcut from the Task Shortcut list in Datacap Desktop.
 - a. Select the batch that you processed with today’s date and time. The Task name is “Verify”.
 - b. Double-click the batch to process it. You see the verify panel with field names and values.
 - You should not see any error here if you used the car image. There will be a green check mark next to each field.
 - If there were any errors or warnings they would likely be because of field validation errors or the character confidence threshold was exceeded for one or more characters.
 - You would validate and correct any errors and then click Submit.
 - c. Scroll down and click Submit.
 - d. Click OK to acknowledge the message “Validations failed. Override and continue?”.
Note: You see in the next procedure why the validation failed message was raised.
 - e. Click OK to acknowledge the message “All documents are complete. Finish Batch?”.
 - f. Click OK to acknowledge the message that the Batch is finished.
2. The “All” shortcut is already selected. Verify that your batch is moved to “Export” task.
3. Leave the Datacap Desktop open for the other procedures.



Note

To run the “Verify” task for all the pending batches, click the “Verify/Fix” shortcut from the Task shortcut list.

Procedure 5: Review the Verify Task Output

1. In Windows Explorer, go to the C:\Datacap\ExpenseDemo\batches folder.
 - a. Open the <date.00000N> folder.
2. Check the Verify.xml file for Batch <date.00000N>.
 - a. Double-click the Verify.xml file to open it in a browser.
 - b. Click “Yes”, if you are prompted to allow the scripts to run.
 - c. Verify that the DATAFILE field has a value: tm00000n.xml
Example: tm000001.xml
 - d. Close the file.

Procedure 6: Run the Export Task

The task in this procedure completes the export of the data to a FileNet Content Manager repository.

1. Click the “All” shortcut from the Task Shortcut list in Datacap Desktop.
 - a. Select the batch that you processed with today’s date and time. The Task name is “Export”.
 - b. Double-click the batch to process it. It automatically processes the batch.
 - c. Click OK to acknowledge the Batch is completed message.
2. The “All” shortcut is already selected. Verify that your batch is removed from the list because all the processes are completed for your batch.
3. If the Export task completes successfully, go to step 5.
4. If the Export step fails it might be because the P8Admin password needs to be set.
 - a. Open the Datacap Application Manager from the desktop icon.
 - b. Select ExpenseDemo in the application column.
 - c. Click the Custom values tab.
 - d. For FileNetPassword Advanced value, type the password IBMFileNetP8.
 - e. Return to procedure 1 step 4 and process another batch to verify that the Export now works.
5. Close Datacap Desktop.



Note

To run the “Export” task for all the pending batches, click the “Export” shortcut from the Task shortcut list. It automatically processes the pending batches. The user has options to stop a particular batch or to continue to process each of the next pending batches.

Review the Export Task Output

6. In Windows Explorer, go to the C:\Datacap\ExpenseDemo\batches folder.
 - a. Open the <date.00000N> folder.
7. Check the Export.xml file for Batch <date.00000N>.
 - a. Double-click the `Export.xml` file to open it in a browser.
 - b. Click “Yes”, if you are prompted to allow the scripts to run.
 - c. Verify that the `FILEUPLOADED` entry has a value for the location of an `pdf` file.
 - d. Close the browser tab.
8. In the same folder as in Step 1a, check that a `pdf` file that contains your batch name is created.

Check the export in the repository

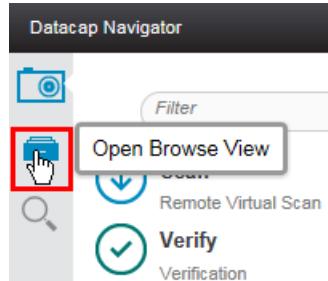
9. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
<http://ecmedu01:9080/navigator/?desktop=datacap>
 - b. Enter the following values:
 User ID: admin
 Password: admin
 - c. Click Login. The Datacap view opens.



Note

The Datacap Navigator on the student image is configured to show the Browse and Search features; you can check the documents (that are exported into the repositories) directly in Datacap Navigator.

10. Click the “Browse View” icon (cabinet icon) on the left pane.



11. Login to the DCExport repository.

User ID: P8Admin
 Password: IBMFileNetP8

12. Select the “DCExport” repository > “Expenses” folder from the left pane.
13. Verify that you have an item that is listed with today’s date, and with the name: “MILLARD BRYAN” on the right pane.
 - a. Click the document to see the properties in the rightmost pane.
 - b. Verify that the properties contain values that were extracted from the scan image.

The screen capture shows the document that is added to the repository, in Datacap Navigator.

The screenshot shows the Datacap Navigator application. The left sidebar displays a tree view of the 'DCExport' folder, with the 'Expenses' folder selected. The main pane shows a list of documents under 'DCExport > Expenses', with the file '20150520.000010-CarRental-MILLARD BRYAN' highlighted. To the right, a preview of the document content is shown, and below it is a 'Properties' panel. A purple box highlights a table titled 'Receipt Details' containing the following data:

	Name	Value
✓	Receipt_Number	703142974
✓	Name	MILLARD BRYAN
✓	Pickup_Date	04/18/10
✓	Total	260.05
✓	Miles	174



The inset diagram in purple is a screen capture from the Datacap Desktop (Verify step) for comparison. It shows the values that are extracted from the original image.

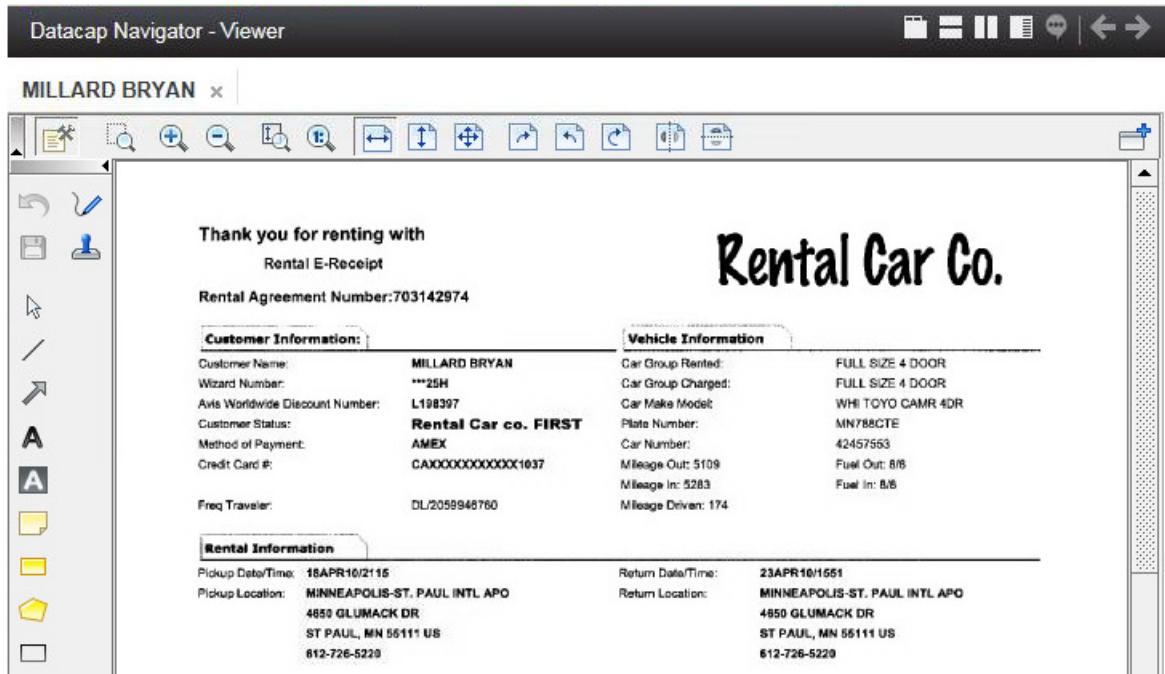
14. Double-click the document to open it and view the stored image in the viewer.



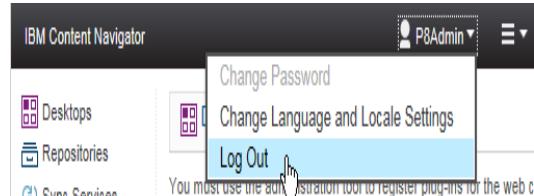
Troubleshooting

You might see an error message warning about a CIWEB1014 error. It is a security issue that only exists on this test image but the document content is still displayed. You will not see this problem on your production systems.

You might also be prompted for “Java Update Needed”. Select “Do not ask again...” option, and click “Later”.



- Close the image.
15. Log out of Datacap Navigator and close the browser.



Lesson 1.8. Introduction to Datacap Navigator

Overview

Why is this lesson important to you?

As a Datacap business analyst, you test your application workflow tasks in Datacap Navigator.

As a business user, you scan and process your batches in Datacap Navigator.

To do these tasks effectively, you must be familiar with the Datacap Navigator interface and with processing batches.

Activities

- [Exercise 1: Explore the Datacap Navigator Interface](#), on page 1-28
- [Exercise 2: Process a batch with Datacap Navigator](#), on page 1-33

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin



Note

Passwords are always case-sensitive.

Exercise 1: Explore the Datacap Navigator Interface

Introduction

In this activity, you explore the Datacap Navigator client to view the task processing and Job Monitor capabilities.

Procedures:

[Procedure 1, "Start Datacap Navigator," on page 1-28](#)

[Procedure 2, "Explore the Datacap Navigator," on page 1-28](#)

[Procedure 3, "View batch information," on page 1-29](#)

[Procedure 4, "User Settings," on page 1-31](#)

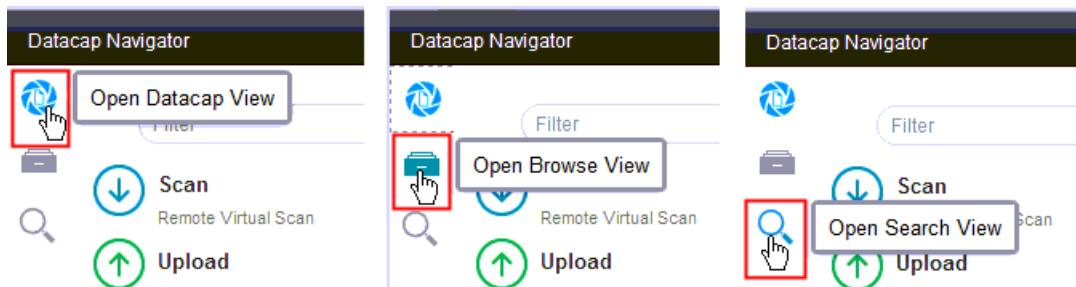
[Procedure 5, "Explore the Administrator view," on page 1-32](#)

Procedure 1: Start Datacap Navigator

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
 User ID: admin
 Password: admin
 - c. Click Login. The Datacap view opens.

Procedure 2: Explore the Datacap Navigator

1. Review the main sections in this view.
 - Feature List - Datacap, Browse, and Search views
 - a. Hover over each icon in the leftmost pane to identify them.



2. In “Datacap View”, explore the shortcuts for different tasks in the Shortcut pane.
 - Navigator Scan, Upload, Verify, and FixUp

3. In “Datacap View” > “Job Monitor”, a list of batches are shown.



Hint

When you click the “Browse View” icon (cabinet icon) or “Search View” icon (magnifying glass icon) on the left pane, you are prompted to log in to the IBM FileNet Content Manager repository.

4. Log in to the DCExport repository.

User ID: P8Admin

Password: IBMFileNetP8

5. Select the “DCExport” repository > “Expenses” folder from the left pane to view.

6. Leave Datacap Navigator open for the next procedure.

Procedure 3: View batch information

1. In “Datacap View”, select an Application to process.

- a. In the banner, to the left of the logged in user, verify or select TravelDocs from the Applications list.

2. In “Datacap View” > “Job Monitor”, select (single click) a batch in the Job Monitor list.



Note

If you double-click an item, it opens for processing.

3. Check that a preview of the scanned image is shown on the right side of the page.

4. Verify that Properties pane displays on the right side of the page.

- a. Click the blue triangle next to “System Properties” to expand the section and show the detailed information for the selected batch.
- b. Collapse and expand the Properties pane with the control (gray triangles at the edge of the panes).
- c. You can also click and hold the edge of the panes, and drag to resize the width.

5. Adjust the batch information columns.

- a. Click a column header to sort by that column.



Note

Which columns to show, and what column order can be configured for each application. Your administrator can customize the columns for the Datacap repository in Content Navigator administration desktop.

6. View the batch history.
 - a. Select (single click) a batch in the Job Monitor list, and click “View History” from the menu bar.
 - b. Batch history opens in a separate window.
 - c. Depending on the task step that batch is at, the history details vary.

Batch history for 20141205.000000



Task	Station	Operator	Start Time	Run Time
Scan	1	admin	12/5/2014 2:12:40 PM	1419
NUpload	1	admin	12/5/2014 2:15:34 PM	4
PageID	1	admin	12/5/2014 2:30:22 PM	3
NProfiler	1	admin	12/5/2014 2:30:25 PM	0
NVerify	1	admin	12/5/2014 2:30:54 PM	68
Export	1	admin	12/5/2014 5:02:09 PM	0

- d. Click Close to close the window.
7. Filter the job list with the filter criteria.
 - a. Type a value from the “Task” column, in the “Filter” field (Example: Export) on the upper right of the page.



Important

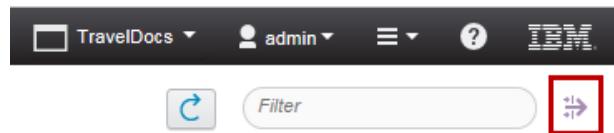
The value that you enter must be available in the “Task” column.

- b. Check that only the items with the specified Task are shown.
- c. Optionally, test another criteria for example, a value from the “Status” column (Example: Job done)



Note

You can do an advanced filtering by clicking the arrow icon next to the Filter field.



8. Select a different Application.
 - a. In the banner, select ExpenseDemo from the Applications list.
 - b. You might be prompted to log in.

User ID: admin

Password: admin

- c. Click Login. The Datacap Batch Monitor view opens.
- d. Verify that a list of batches are shown.
- e. The Job column shows “Main Job”.



Note

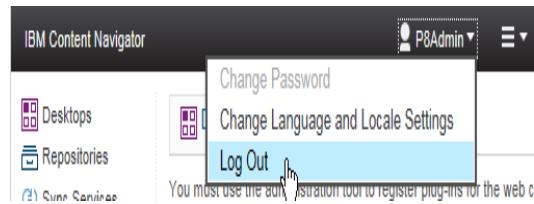
On the student image, some batches are processed in Datacap Desktop for the “ExpenseDemo” application. Those batches are listed in Desktop Navigator when you select the “ExpenseDemo” application. You can monitor the jobs for those batches.

The Task Shortcut pane is not visible for the ExpenseDemo application because this application is not configured to process in Datacap Navigator. In another course, you are going to configure this application to include a Navigator Job with compatible tasks profiles.

Procedure 4: User Settings

Business users can change the settings.

1. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.
2. In the “Global” tab, observe that you can configure to hide the following features.
 - o Title bar for all the widgets.
 - o Shortcut pane when you start the task.
3. Observe the tabs for each task such as Scan, Upload, Classify, and Verify.
4. Click Cancel to close the window and log out of the Datacap Navigator.
5. Log out the Datacap Navigator and close the browser.



Procedure 5: Explore the Administrator view

Administrators access this Datacap Navigator view to configure features. The functions available in this view is equivalent to what is available on the tmweb Administrator tab.

1. In the Internet Explorer browser, open the Datacap Navigator for administrators.

- a. Click the “DCN-dcAdmin” shortcut or enter the following URL:

`http://ecmedu01:9080/navigator/?desktop=dcadmin`

- b. Enter the following values:

User ID: admin

Password: admin

- c. Click Login. The Administration view in Datacap Navigator opens.

2. Explore the features that are available in this view.

- a. Click each feature in the following list to see the details:

- o Workflows
- o Groups
- o Users
- o Stations
- o Shortcuts
- o Panels

3. Log out the Datacap Navigator and close the browser.



Note

You are going to learn about this view and the administration topics in detail in the Datacap Administration course.

Exercise 2: Process a batch with Datacap Navigator

Introduction

In this activity, you process a document batch in Datacap Navigator.

Procedures

[Procedure 1, "Scan batches," on page 1-33](#)

[Procedure 2, "Review the Upload Task Output," on page 1-36](#)

[Procedure 3, "Start Datacap Rulerunner Service," on page 1-36](#)

[Procedure 4, "Run the PageID and Profiler Tasks," on page 1-36](#)

[Procedure 5, "Run the Verify Task," on page 1-37](#)

[Procedure 6, "Review the Verify Task Output," on page 1-38](#)

Procedure 1: Scan batches

The task in this procedure reads the batch pages.

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
User ID: admin
Password: admin
 - c. Click Login. The Datacap view opens.
2. In Datacap Navigator, select an Application to process.
 - a. In the banner, verify or select TravelDocs from the Applications list.
3. Scan a batch.
 - a. Click “Navigator Scan” (Blue down arrow icon) from the Shortcut list on the left.



Troubleshooting

If you are prompted with errors as shown in the following screen captures, click “Close”. Click “Cancel” on the “Scan” tab. Restart the browser and open the Datacap Navigator. Then start the Scan again.

The file cannot be found.
The batch cannot be retrieved by using the batch ID., application: TravelDocs, user: admin, station: 1

The batch cannot be retrieved.
Failed to grab a queue with qID:26

If you are prompted with “Java Update Needed”, select the “Do not ask again...” option and click “Later”.

If you are prompted with any “Security Warning”, select the “Do not show this again...” option and click “Allow”.

- b. Click “Browse” next to the “Source” field.
 - c. In the “Choose File to Upload” window, go to C:\DC9-Lab Exercises\TravelDocs
 - d. Select the `Flight1.tif` image and click Open.
 - e. Click “Scan” at the top-right of the page.
4. Verify that image ID is listed in the “Batch Structure” and the image is shown in the viewer.
 5. Rescan an image.
 - a. Click “Browse” next to the “Source” field.
 - b. In the “Choose File to Upload” window, go to C:\DC9-Lab Exercises\TravelDocs
 - c. Select the `Car1.tif` image and click Open.
 - d. Click “Scan” and verify that you have more options in the list (“Append”, “Insert”, or “Replace”).
 - e. You can rescan the image, or scan more images to add to the batch.

- f. Select “Append”, verify that the image is added.

“Scanned Pages(2/2)” shows that there are 2 pages as shown in the following screen capture.

- g. Optionally, test the other options: “Insert” or “Replace”.

6. Click Submit.
7. Notice that the Upload task runs automatically.



Note

The Upload task uploads the scanned pages to the Datacap Server. The student image is configured to run the “Upload” task automatically.

- h. Leave the Datacap Navigator open for the other procedures.

Review the Scan Task Output

8. View results in the Batches folder:
 - a. In Windows Explorer, go to the batches folder C:\Datacap\TravelDocs\batches.
 - b. Verify that the batch that you scanned created a folder with a name that has today's date in this format: <date.00000>.

Example: 201501123.000000

9. Check the nscan.xml file for Batch <date.00000N>.
 - a. Open the <date.00000N> batch folder.
 - b. Double-click the `nscan.xml` file to open it in Internet Explorer browser.
 - c. Click “Yes”, if you are prompted to allow the scripts to run.
 - d. Verify that the page you scanned is identified.
 - o The Batch Type is “TravelDocs”.
 - o The Document Type is not set yet.
 - o The page type is “Other”.
 - e. Close the browser tab.
10. Leave the Windows Explorer folder open for rest of this lab.

Procedure 2: Review the Upload Task Output

In the previous procedure, Upload task ran automatically. In this procedure, you review the files that are created.

1. In Windows Explorer, go to the C:\Datacap\TravelDocs\batches folder.
 - a. Open the <date.00000N> folder.
2. Check the nupload.xml file for Batch <date.00000N>.
 - a. Double-click the `nupload.xml` file to open it in Internet Explorer browser.
 - b. Click “Yes”, if you are prompted to allow the scripts to run.
 - c. The file contains value for the “IMAGEFILE” field.
 - d. Close the browser tab.
3. Leave the Windows Explorer folder open for rest of this lab.

Procedure 3: Start Datacap Rulerunner Service

1. Click Start > All Programs > IBM Datacap Services > Datacap Rulerunner Manager.
 - a. You can also use the “Datacap Rulerunner Manager” shortcut on the desktop.
2. In the “Datacap Rulerunner Manager” window, select the “Rulerunner” tab.
 - a. If the Status shows that the service is not running, click “Start” to start the server.

Note: The Start operation is disabled if it is already started.
 - b. Click Close to close the window.

Procedure 4: Run the PageID and Profiler Tasks

The two tasks in this procedure complete the page identification and document assembly. Rulerunner is configured to run the PageID, Profiler, and Export task automatically.

1. When you started Rulerunner in the previous procedure the “PageID” and “Profiler” tasks run automatically.

2. In Windows Explorer, in the same batch folder as in the previous procedure, verify that the following two files are located.
 - PageID.xml
 - Profiler.xml
3. Check the PageID.xml file for Batch <date.00000N>.
 - a. Double-click the PageID.xml file to open it in a browser.
 - b. Click “Yes”, if you are prompted to allow the scripts to run.
 - c. Verify that the page type is identified as Air_Ticket.
 - d. Close the browser tab.
4. Check the Profiler.xml file for Batch <date.00000N>.
 - a. Double-click the Profiler.xml file to open it in a browser.
 - b. Click “Yes”, if you are prompted to allow the scripts to run.
 - c. Verify that the document type is identified as Flight for the Air_Ticket page.

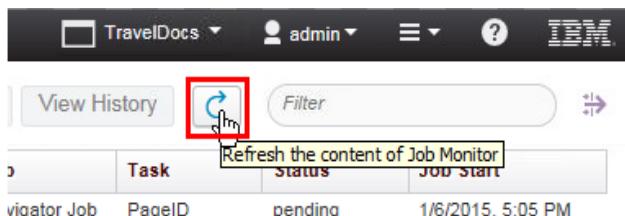
B	20150520.000000
	STATUS : 0
	TYPE : TravelDocs
	NeedsFixup : No
D	20150520.000000.01
	TYPE : Flight
	STATUS : 0
P	TM000001
	STATUS : 1
	TYPE : Air_Ticket
	ScanSrcPath : C:\DC9-Lab Exercises\TraveDocs\Flight1.tif

- d. Close the browser tab.

Procedure 5: Run the Verify Task

The task in this procedure completes the data verification.

1. Refresh the list in the Datacap Navigator Monitor view.



- a. Verify that your batch is now in the pending state for the “Verify” task. The Batch has today’s date.



Troubleshooting

If there are no exceptions, the batch advances to the “Verify” task after the “PageID” and “Profiler” tasks.

If there are any exceptions in the pages that are scanned, the batch item moves to “NFixUp” step after the “PageID” and “Profiler” tasks.

2. Double-click your batch.
 - a. Your batch item is opened in the “Verify” tab.
 - b. Click Submit twice (if necessary) to complete the 2 pages.
 - c. Click OK to acknowledge the message dialog, “All documents are complete. Do you want to finish batch?”



Note

To run the “Verify” task for all the pending batches, click the “Verify” shortcut from the Task shortcut list. The user can configure the Datacap Navigator to automatically open the next pending batch in the queue when you submit a current batch.

Procedure 6: Review the Verify Task Output

1. In Windows Explorer, go to the batches folder C:\Datacap\TravelDocs\batches.
 - a. Open your batch folder.
 - b. Double-click the `verify.xml` file to open it in a browser.
 - c. Click “Yes”, if you are prompted to allow the scripts to run.
 - d. Verify that the DATAFILE field has a value: `tm00000n.xml`
Example: `tm000001.xml`
2. Check the DATAFILE file for the page.
 - a. Click the DATAFILE file link `tm00000n.xml` to open it in the browser.
 - b. Click “Yes”, if you are prompted to allow the scripts to run.
 - c. Note all the fields have valid data.
 - d. Close the browser tab.
 - e. Close the Windows Explorer.

Procedure 7: Check your batch status

After you complete “Verify” task, your batch moves to the “Export” task. The Export task runs automatically, and the batch is completed.

1. Verify your batch status.
 - a. Refresh the list in the Datacap Navigator Monitor view.
 - b. Check your batch information. The “Task” column has the value: “Export”. The Status column has the value: “Job done”.
2. Logout of the Datacap Navigator.
 - a. Click the down-arrow on the banner area next to the user name and select Log Out.
 - b. Close the Internet Explorer window.

Procedure 8: Stop Datacap Rulerunner Service

1. Click Start > All Programs > IBM Datacap Services > Datacap Rulerunner Manager.
 - a. You can also use the “Datacap Rulerunner Manager” shortcut on the desktop.
2. In the “Datacap Rulerunner Manager” window, select the “Rulerunner” tab.
 - a. If the service is running, click “Stop” to stop the server.
 - b. Click Close to close the window.

Lesson 1.9. Datacap web client (Optional)

Overview

Why is this lesson important to you?

As a Datacap business analyst, you test your need to configure and monitor the Datacap system with the Datacap web client.

To do these tasks effectively, you need to be familiar with the Datacap web client interface.

Activities

- [Exercise 1: Explore the Datacap web client](#), on page 1-41
- [Quiz 1: Datacap web client interface](#), on page 1-44

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin



Note

Passwords are always case-sensitive.

Exercise 1: Explore the Datacap web client

Introduction

This activity demonstrates opening Datacap Navigator and views the application configuration, administration, and task processing capabilities. It also demonstrates how Navigator is used as a local processing client and a Datacap Server client.

Procedures

[Procedure 1, "Datacap web client capabilities," on page 1-41](#)

Procedure 1: Datacap web client capabilities

1. Log in to tmweb.

- a. Open the Internet Explorer browser.
- b. Type URL: <http://ecmedu01/tmweb.net>

Login Credentials:

Select an application: TravelDocs

User ID: *admin*

Password *admin*

Station: 1

- c. Click Login.

2. Operations - Run Shortcuts

- The operations view is the first view that you see. This view is where you run tasks that are configured to run from the Datacap Web client.
- These task shortcuts are configured as Web-Job shortcuts on the tmweb > Administrator > Shortcuts view.
- Only Web Job shortcuts are displayed in the Operations view.

3. Click the Monitor tab.

- With the top row of controls you can:

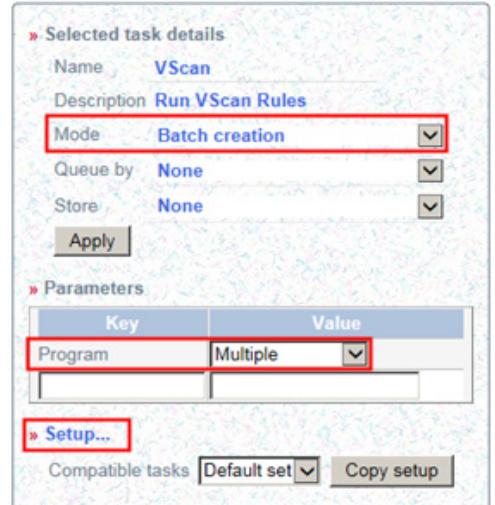


- Select the Number of batches displayed on a page.
- Delete all batches in this application, irrespective if they are complete or not.
- Configure advanced filter options.
- Refresh the display.
- Select a default refresh rate.
- Set all configuration options back to their default value.

- The second row of controls is column filters.



- Filter by Batch number, Job name, Task name, Batch status, Operator ID, or Station number.
 - The third area is the batch monitor area that shows the properties and status for batches that are active or complete.
 - The fourth area is the column selection area.
 - Click the Pages column selection object.
 - Notice that it turns gray and the Pages column disappears from the monitor view.
4. Administrator - Workflow view
- Click the Administrator tab.
 - The view for the Workflow tab is shown.
 - Notice the jobs that are configured for the various clients that are able to process tasks.
 - Main Job for Datacap Desktop and FastDoc
 - Web Job for tmweb
 - Navigator Job for Datacap Navigator.
 - Expand the Main Job node.
 - Click the VScan task.
- There can be only one Batch creation task. It is normally the Scan task.
- The program is set to Multiple. This selection means that multiple clients and services can run the task. Example Desktop, FastDoc, and Rulerunner.
- Click Setup.
- Verify that you see parameter section for Rulerunner, Desktop, and FastDoc.
- Close the setup window.
 - Click the PageID task.
- Notice that Program Value is set to Rulerunner.
- Click Setup.



- Click the Groups tab.

You can create new groups from scratch or by copying an existing group and modifying it. You can also remove groups.

- b. Click the Everyone group. Notice that you can:
 - Configure group Privileges.
 - Configure Permissions.
 - Select the users that are members of this group.
6. Administrator - Users view
 - a. Click the Users tab. Notice that you can:
 - Create new user from scratch.
 - Copying an existing user and modifying it.
 - Remove users.
 - b. Click the edit1 user. Notice that you can:
 - Configure user Privileges.
 - Configure Permissions.

7. Administrator - Stations view

- a. Click the Station tab. Notice that you can:
 - Create new stations from scratch.
 - Copying an existing station and modifying it.
 - Remove stations.

A station is just a logical designation that can be used for managing batch flow.

8. Administrator - Shortcuts view

- a. Click the Shortcuts tab. Notice tat you can:
 - Create new stations from scratch.
 - Copying an existing station and modifying it.
 - Remove stations.
- b. Click the Verify shortcut.

The permissions determine which tasks are visible for each Job definition.

The user and group permissions set through the User and Group tabs also influence which tasks are visible in the various clients, for processing batches.

9. Logout and close the tmweb window.

- a. Click Logout on the right side of the tab/heading bar.
- b. Click OK to acknowledge the verification message.
- c. Close the tmweb window.

Quiz 1: Datacap web client interface

For each of the following statements, indicate whether the statement is accurate by marking it True or False. Taskmaster Web Client is abbreviated to tmweb in this exercise.

1. tmweb is the Datacap Capture application development environment.

True or False

2. tmweb is one of the capture job processing environments.

True or False

3. tmweb provides direct access to the Application Wizard through an icon on the icon bar.

True or False

4. tmweb provides the capability to process document batches manually through every task of the capture process.

True or False

5. tmweb Client provides the capability to process document batches manually through some task of the capture process.

True or False

6. Taskmaster Administrator functions are done on the tmweb > Administrator tab subtabs.

True or False

7. Taskmaster Administrator functions are done on the tmweb > Configuration tab subtabs.

True or False

8. The tasks on the tmweb > Operations tab are configured on the tmweb > Administrator > Workflow tab and the tmweb > Administrator > Shortcut tabs.

True or False



Note

Refer to [Appendix , "Lesson 1.9. Datacap Web Client interface: Quiz,"](#) on page 1-51 for answer keys to the questions.

Appendix 1. Answer keys to quizzes

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

Lesson 1.1. Datacap overview: Quiz

For each question, indicate the correct answer or mark the statement True or False.

1. Datacap supports both structured and unstructured documents.

True or False

Answer = True

2. Which of the following descriptions apply to IBM Datacap? Select more than one option. Circle all that apply.

- a. Automates capturing documents and the extraction of appropriate data.
- b. Improves efficiency and optimizes business processes.
- c. Supports compliance and Risk mitigation.
- d. Reduces costs and speeds up the response.
- e. Improves customer service.

Answer = a, b, c, d, and e

Lesson 1.2. Datacap process: Quiz

For each question, indicate the correct answer or mark the statement True or False.

1. The Scanners and Multi-Functional Devices input channels support which of the following file types? Select more than one option. Circle all that apply.
 - a. TIFF
 - b. JPEG
 - c. TXT
 - d. HTML
 - e. PDF
 - f. DOCX
 - g. ZIP

Answer = a, b, and e

2. Both one- and two-dimensional Barcodes are used for page recognition.

True or False

Answer = True

3. Datacap captured documents and data can be exported to content repositories or can be used in applications.

True or False

Answer = True

4. Which of the following items are Datacap page identification methods? Select more than one option. Circle all that apply.

- a. Keyword
- b. Batch Process
- c. Pattern recognition
- d. Fingerprint
- e. Document export
- f. Input channel

Answer = a, c, and d

Lesson 1.3. Role-based Datacap clients: Quiz

For each question, indicate the correct answer or mark the statement True or False.

1. Which one of the following items is not a Datacap client for business users to process a batch?
 - a. Datacap Navigator
 - b. Datacap Mobile
 - c. Datacap Desktop
 - d. Datacap FastDoc
 - e. Datacap Studio

Answer = e

2. Datacap FastDoc can be used to rapidly configure the Datacap applications and as a client to scan and verify the documents.

True or False

Answer = True

Lesson 1.4. Identify architecture configuration: Quiz

For each question, indicate the correct answer or mark the statement True or False.

1. Many production Datacap installations can be configured with a Single system configuration.
True or False **Answer = False**
2. The most efficient and cost effective Datacap installations are client/server configurations where all software components are installed on dedicated servers.
True or False **Answer = False**
3. Most production Datacap systems have some Datacap components that are installed on dedicated systems and some components on shared systems.
True or False **Answer = True**
4. Consider the terms “Centralized Deployment” and “Distributed deployment”. Which of the following statements is correct.
 - a. Centralized and Distributed refer to how Datacap components are deployed across servers in a Datacap configuration.
 - b. Centralized and Distributed refer to geographic location of Datacap services and tasks.

Answer = b

5. Consider the scenario where all of the Datacap services are provided by servers that are in a single-server room. Scanning and verification tasks are done from a workstation or scanning stations throughout multiple buildings at the same physical address and all connected to the same LAN. What is the classification for this scenario?
 - a. Centralized.
 - b. Decentralized.

Answer = a

6. Consider the scenario where all of the Datacap servers are at one physical location. Scanning and verification tasks are done from the location and from remote locations that are connected over the Internet. What is the classification for this scenario?
 - a. Centralized.
 - b. Decentralized.

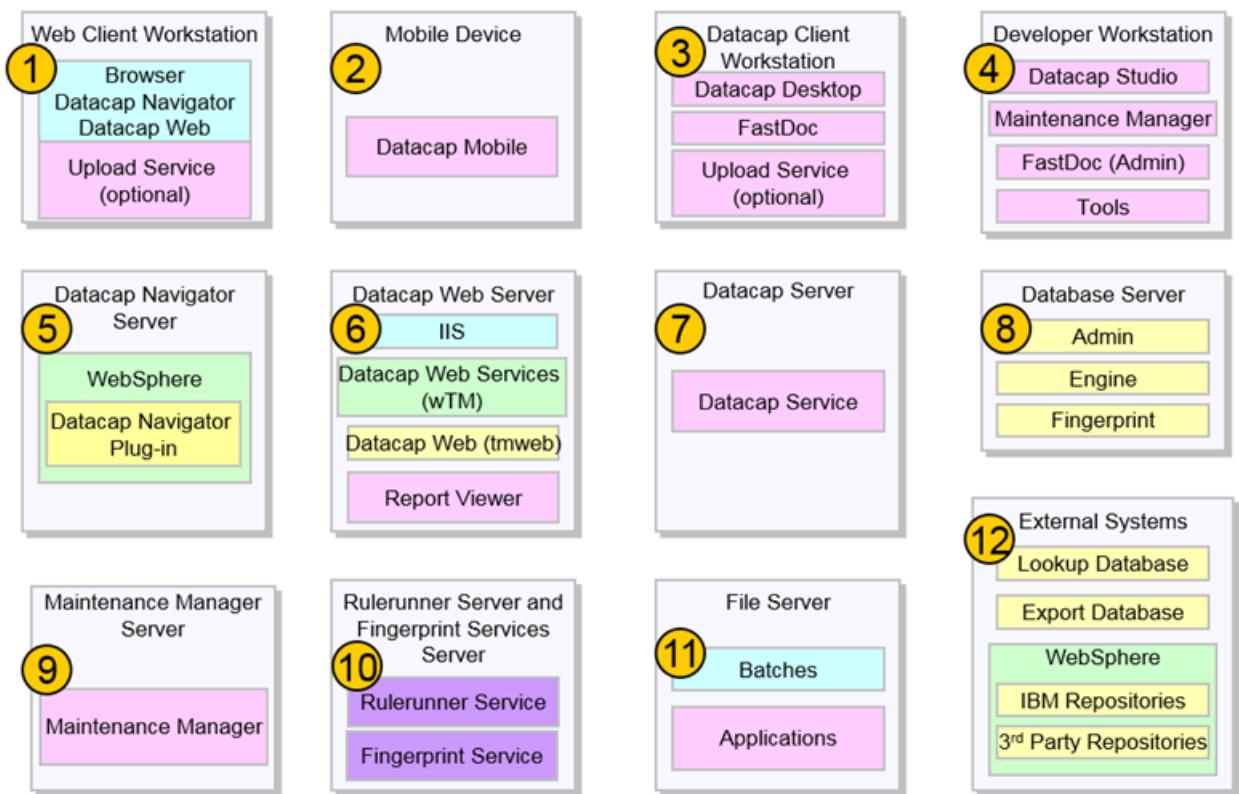
Answer = b

Lesson 1.5. Identify architecture components: Quiz

In the following table, enter the number that corresponds to the Datacap component name from the following Datacap system architecture diagram.

Number	Datacap component name	Number	Datacap component name
4	Developer Workstation	1	Web Client Workstation
5	Datacap Navigator Server	6	Datacap Web Server
8	Database Server	9	Maintenance Manager Server
3	Datacap Client Workstation	2	Mobile Device
11	File Server	7	Datacap Server
10	Rulerunner Server and Fingerprint Services Server	12	External Systems

Diagram of Datacap system architecture.



Lesson 1.9. Datacap Web Client interface: Quiz

For each of the following statements, indicate whether the statement is accurate by marking it True or False. Taskmaster Web Client is abbreviated to tmweb in this exercise.

1. tmweb is the Datacap Capture application development environment.

True or False

Answer = False

2. tmweb is one of the capture job processing environments.

True or False

Answer = True

3. tmweb provides direct access to the Application Wizard through an icon on the icon bar.

True or False

Answer = False

4. tmweb provides the capability to process document batches manually through every task of the capture process.

True or False

Answer = False

5. tmweb Client provides the capability to process document batches manually through some task of the capture process.

True or False

Answer = True

6. Taskmaster Administrator functions are done on the tmweb > Administrator tab subtabs.

True or False

Answer = True

7. Taskmaster Administrator functions are done on the tmweb > Configuration tab subtabs.

True or False

Answer = False

8. The tasks on the tmweb > Operations tab are configured on the tmweb > Administrator > Workflow tab and the tmweb > Administrator > Shortcut tabs.

True or False

Answer = True

Unit 2. System Configuration

Estimated time

04:00 hours

Unit overview

Lessons

[Lesson 2.1, "Datacap Single-Machine Configuration,"](#) on page 2-5

[Lesson 2.2, "Maintain Users and Groups, and Configure Security,"](#) on page 2-10

[Lesson 2.3, "Authentication and Encryption,"](#) on page 2-15

[Lesson 2.4, "Multi-Machine Configuration Considerations,"](#) on page 2-23

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/IBMFileNetP8.
- 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.

Key	Value
Product Name	IBM Content Navigator
Build Level	icn203.700.725 (201603280144)
Version	2.0.3
Daeja ViewONE Version	4.1.5.0.2.3581
Operating System	Windows Server 2008 R2 6.1

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/IBMFFileNetP8
 - 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 2.1. 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 2-6

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

[Procedure 1, "Configure the Datacap Server," on page 2-6](#)

[Procedure 2, "Configure the Datacap Web Server," on page 2-7](#)



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 if 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:](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 2.2. 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 2-11

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

[Procedure 1, "Set the Datacap Authentication Mode," on page 2-11](#)

[Procedure 2, "Create a User for the Verify Task," on page 2-12](#)

[Procedure 3, "Create a Group for the Verify Task," on page 2-12](#)

[Procedure 4, "Process a TravelDocs Document Batch," on page 2-13](#)



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 2.3. 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 2-16

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

[Procedure 1, "Create Datacap Users and Groups," on page 2-16](#)

[Procedure 2, "Configure Datacap Taskmaster Server service User," on page 2-18](#)

[Procedure 3, "Configure Datacap Server Manager to use LLLDAP," on page 2-19](#)

[Procedure 4, "Process a TravelDocs Document Batch," on page 2-20](#)



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
DCVerifier	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 2-3 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 PagID 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 2.4. 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 2-24
- [Exercise 2: Configure the Datacap Workstation](#), on page 2-31
- [Exercise 3: Configure the Datacap Web Server](#), on page 2-37

User accounts

Type	User ID	Password
Operating system	Administrator datacap	passw0rd class
Workstation Windows Users	Administrator datacap	class class
Datacap Admin (LLLLDAP)	susan	class
Datacap users (LLLLDAP)	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

[Procedure 1, "Disable Datacap Taskmaster Server service on the Windows 7 Client," on page 2-24](#)

[Procedure 2, "Enable Datacap Taskmaster Service on Server 2008," on page 2-25](#)

[Procedure 3, "Configure Sharing and Permissions," on page 2-25](#)

[Procedure 4, "Mount the Datacap folder on the Server," on page 2-27](#)

[Procedure 5, "Copy TravelDocs Application to the Server," on page 2-27](#)

[Procedure 6, "Configure datacap.xml Content and Location," on page 2-29](#)



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”.
 - 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

[Procedure 1, "Exporting the Encryption Keys,"](#) on page 2-31

[Procedure 2, "Copy the Server Encryption Key,"](#) on page 2-32

[Procedure 3, "Import the Encryption Key,"](#) on page 2-32

[Procedure 4, "Configure the database connection parameters,"](#) on page 2-32

[Procedure 5, "Verify the New Configuration with TMA Authentication,"](#) on page 2-34

[Procedure 6, "Verify the New Configuration with LLLDAP Authentication,"](#) on page 2-35

[Procedure 7, "Verify LLLDAP Authentication for Each Datacap Account,"](#) on page 2-36



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:IBMFFileNetP8?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 2-31

[Procedure 2, "Copy the Server Encryption Key,"](#) on page 2-32

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 2-32

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 2-37](#)



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 2-7](#)

Lesson 1 [Procedure 3, "Configure the Datacap Web Client," on page 2-7](#)

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 3. Component Configuration

Estimated time

04:00 hours

Unit overview

Lessons

[Lesson 3.1, "Configure Datacap Rulerunner," on page 3-4](#)

[Lesson 3.2, "Configure Datacap Maintenance Manager," on page 3-19](#)

[Lesson 3.3, "Configure Datacap Web Services," on page 3-27](#)

[Lesson 3.4, "Configure Datacap Dashboard," on page 3-32](#)

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.

The screenshot shows a Microsoft Internet Explorer window with the URL <http://ecmedu01:9080/navigator/ping.jsp?logOut=true>. The title bar reads "http://ecmedu01:9080/navigator/ping.jsp?logOut=true - Internet Explorer". The menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar includes Back, Forward, Stop, Refresh, Home, and Favorites. Bookmarks are listed as Bookmarks, ICN-Admin, P8-Admin, ICN-User, DCN-dcAdmin, and DCN-Datacap. The address bar shows the current URL. The main content area is titled "IBM Content Navigator Ping Page" and contains a table with the following data:

Key	Value
Product Name	IBM Content Navigator
Build Level	icn203.700.725 (201603280144)
Version	2.0.3
Daeja ViewONE Version	4.1.5.0.2.3581
Operating System	Windows Server 2008 R2 6.1



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 3.1. 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 3-5

User accounts

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

[Procedure 1, "Process a TravelDocs Document Batch Manually," on page 3-5](#)

[Procedure 2, "Collect Configuration Information," on page 3-8](#)

[Procedure 3, "Set Service Credentials for Application," on page 3-8](#)

[Procedure 4, "Verify RRS Folder Permission," on page 3-9](#)

[Procedure 5, "Configure Rulerunner on Multiple Servers," on page 3-10](#)

[Procedure 6, "Configure Datacap Rulerunner Service," on page 3-11](#)

[Procedure 7, "Configure Rulerunner to run your applications," on page 3-12](#)

[Procedure 8, "Scan a New Batch with Datacap Desktop," on page 3-15](#)

[Procedure 9, "Run TravelDocs Tasks with Rulerunner," on page 3-16](#)

[Procedure 10, "Process the Verify Task with Datacap Desktop," on page 3-17](#)

[Procedure 11, "Verify that Rulerunner runs the Export Task," on page 3-17](#)

[Procedure 12, "Stop the Rulerunner Server," on page 3-18](#)



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 DCOPProcessor 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 DCOPProcessor 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 DCOPProcessor 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
ImagefixINI:	\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.
- From the Rulerunner Server Start menu, select All Programs > IBM Datacap Services > Datacap Rulerunner Manager.
 - Click the Rulerunner Login tab to display it.
 - 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.

You configure rulerunner for the first time in Datacap RuleRunner Manager and specify jobs (tasks) you want to run on rulerunner. When you save the changes for the first time, the rule runner configuration file will be generated.



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 is 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 3.2. 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 3-20

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

[Procedure 1, "Configure Datacap Maintenance Manager Application," on page 3-20](#)

[Procedure 2, "Check the Database Connection Parameters," on page 3-20](#)

[Procedure 3, "Set a Batch to the Hold State," on page 3-21](#)

[Procedure 4, "Verify that the NENU Application Exists," on page 3-22](#)

[Procedure 5, "Configure the NENU Ruleset," on page 3-23](#)

[Procedure 6, "Run The NENU Ruleset with Datacap Maintenance Manager," on page 3-25](#)



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 exists 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 Fingerprint database Export database administration Engine	NENULook NENUFingerprint Leave Blank NENUAdm 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 3-2 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="tmsservers">

```
<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 3.3. 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 3-28

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

[Procedure 1, "Share and Set Security Permissions for wTM User,"](#) on page 3-28

[Procedure 2, "Configure wTM Web Application,"](#) on page 3-29

[Procedure 3, "Ensuring the Required IIS Components are Installed,"](#) on page 3-30

[Procedure 4, "Validating the wTM Installation,"](#) on page 3-31



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 3.4. 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 3-33
- [Exercise 2: Monitor system performance with Datacap Dashboard](#), on page 3-38

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

[Procedure 1, "Install the Datacap Navigator plug-in," on page 3-33](#)

[Procedure 2, "Configure Dashboard Feature for dcAdmin desktop," on page 3-35](#)

[Procedure 3, "Activate Accuracy and performance statistics," on page 3-36](#)



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	<code>http://ecmedu01:85/ServicewTM.svc</code>

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.

	Name	ID	Description
★	Admin Desktop	admin	Desktop for users with administrative privileges
	Datacap	datacap	Datacap Main Page
	Datacap Admin Console	dcadmin	
	Datacap Advance Desktop	dcAll	Contains Datacap Main Feature, Quick Launch Pane and Shortcut Pane
	Datacap QuickLaunch Desktop	dcQuickLaunch	Contains Datacap Main Feature, only enable quick launch pane by default
	Sample Desktop	SampleDesktop	

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,  
    "pageAccuracy": 97.9,  
    "fieldAccuracy": 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.

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

Desktop: Datacap Admin Desktop

* General * Repositories * Layout Appearance * Menus Workflows Mobile

Desktop Features

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

* Layout: ecm.widget.layout.NavigatorMainLayout

* Displayed features:

Feature
<input checked="" type="checkbox"/> Datacap Admin Console
<input checked="" type="checkbox"/> Datacap Dashboard Page
<input checked="" type="checkbox"/> Browse

Move Up Move Down

Feature configuration

IBM Datacap Dashboard Feature configuration

SLA JSON string: {"SLA":{ "businessName": "Com"}}

* SMTP mail server:

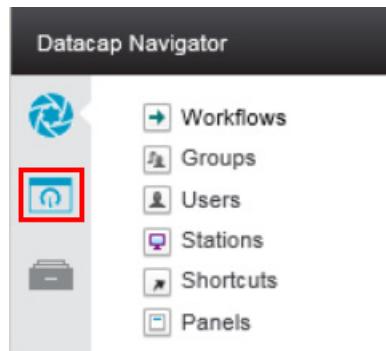
Notification email address:

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” field.
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 3-38](#)



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 them 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.

Summary of in-progress tasks for the application, with a breakdown for each task, and volume activity over time.

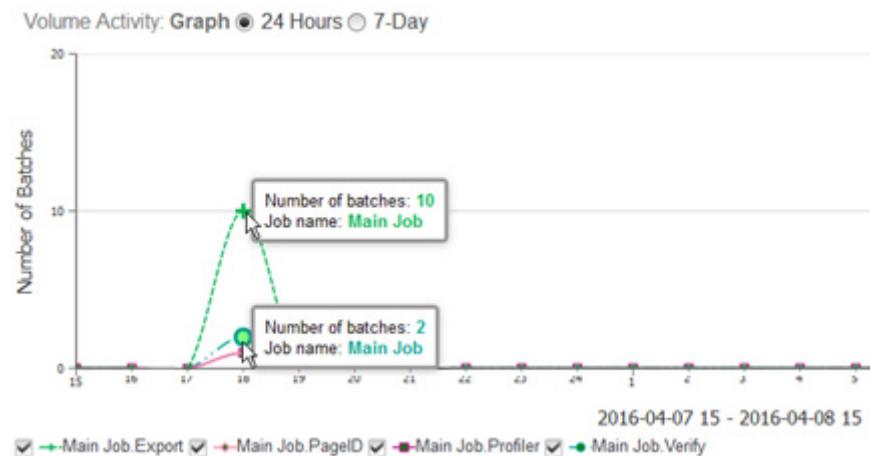


- The Verify task requires human action and is represented by a pink centered donut.
- The three yellow centered donuts represent the task, which can run unattended.
- The colors, on the circumference of the donuts proportionally represent the portion of the total batches that are active.

- 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.

- Click the Team Statistics Tab.
- Click the Accuracy tab.

End of exercise

Unit 4. Datacap Navigator Configuration

Estimated time

08:00 hours

Unit overview

This unit contains these lessons.

Lessons

- [Lesson 4.1, "Navigator Updates," on page 4-7](#)
- [Lesson 4.2, "Change Datacap Navigator User Settings," on page 4-10](#)
- [Lesson 4.3, "Configure Users and Groups," on page 4-19](#)
- [Lesson 4.4, "Enable Rescan for the Verify task," on page 4-23](#)
- [Lesson 4.5, "Create Custom Panels," on page 4-29](#)
- [Lesson 4.6, "Implement External Data Services," on page 4-40](#)
- [Lesson 4.7, "Transactional Capture," on page 4-56](#)
- [Lesson 4.8, "Install and Customize Datacap Navigator," on page 4-71](#)

Requirements

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



Windows

All exercises in this unit are done exclusively on the server image ECMEDU01.

Do this first

1. In your server system, if you are prompted to log in to the system, use:

Type	User ID	Password
Operating system	Administrator	passw0rd



Important

Switch to the LLLDAP Authentication Method and configure TravelDocs to use an LLLDAP enabled Database.

The Tivoli Directory Services database is already configured for LLLDAP group authentication. Because TravelDocs is configured as the default Datacap Navigator repository, it must be configured with Datacap groups defined in the Tivoli Directory Services Database.

- If you are continuing this unit as part of the Administration course (F262), then in the Unit 1, you configured the TravelDocs application for LLDAP authentication already. You can skip step 2 to 4 and go to step 5.
- If you are taking this unit as a standalone class (F257), then you must do Steps 2 - 4 to configure the TravelDocs application to Authenticate using LLLDAP.

2. In your server image, copy the LLLDAP enabled Database Admin database for TravelDocs.

- a. In Windows Explorer, go to C:\DC9-Lab Exercises\TravelDocsDB.
- b. Right-click the TravelDocsAdm-LLLDAP.mdb file and select Copy.
- c. Go to C:\Datacap\TravelDocs.
- d. Right-click anywhere in the folder and select Paste.

3. In your server image, Connect to LLLDAP enabled Adm database file.

Configure the TravelDocs Admin Database connection string to point to an admin database that has the groups included.

- a. Click Start > All Programs > IBM Datacap Services > Datacap Application Manager.
- b. Scroll and select the TravelDocs application in the left pane.
- c. In the right pane, the database paths are on the Main tab.
- d. In the Main tab > for the “Administration” field, click the Ellipsis at the right of the field.
- e. In the “Database connection parameters” dialog box > “Database type or provider name” field, select Microsoft Access (Jet) from the list.
- f. Click the Database Ellipsis and browse and select the database:
C:\Datacap\TravelDocs\TravelDocsAdm-LLLDAP.mdb
- g. Click Open.
- h. Click OK.
- i. Click “Save changes” and then close the Datacap Application Manager.

4. In your server image, select the LLLDAP Authentication Method.

- a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager. or use the shortcut on the desktop.
- b. In the “Service” tab, click Stop (Red rectangle).

- c. Click the Datacap tab.
 - d. If the “Advanced settings” are not showing, then click “Show advanced”.
 - e. For the “Authentication System” field, select the LLLDAP option from the list.
 - f. In Windows Explorer, open the C:\DC-Lab Exercises\Authentication\DCServiceTemplates.txt file.
 - g. Copy LLLDAP Authentication path template string from the file.
 - h. Paste it in the Authentication path template field.
 - i. Click Save.
 - j. Click Close to close the Datacap Server Manager window.
5. In your server image, verify and if needed, start Datacap Taskmaster Server services.
 - a. Double-click the Datacap Server Manager shortcut on the desktop.
 - b. In the Datacap Server Manager > Service tab, click Start (Right green arrow) to start the Datacap Server.
 - c. Click Close to close the Datacap Server Manager window.
 6. In your server image, verify and if needed, start WebSphere Application Server.
 - a. Open the “WebSphere Admin” folder on the Desktop.
 - b. Double-click the Start Server1.bat script file.

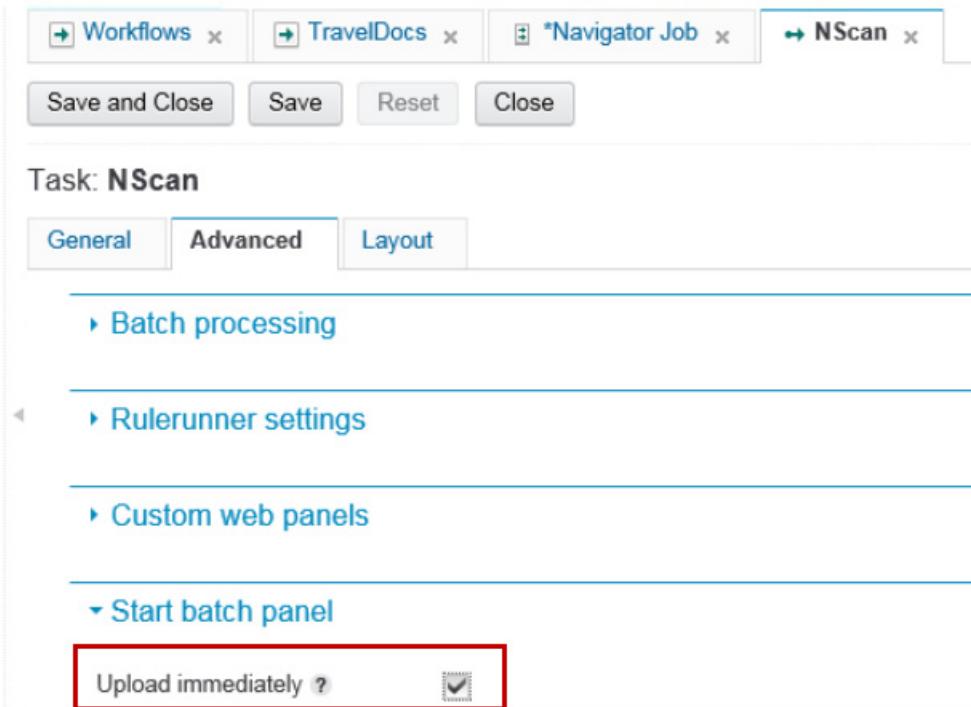
It starts the IBM FileNet Content Manager, and the IBM Content Navigator.
 7. In your server image, verify and if needed, start the Rulerunner services.
 - a. Double-click the “Datacap Rulerunner Manager” shortcut on the desktop.
 - b. In the “Datacap Rulerunner Manager” window, select the “Rulerunner” tab.
 - c. If the Status shows that the service is running, click “Stop” to stop the server.

Note: The Stop operation is disabled if it is already stopped.
 - d. In the “Rulerunner Login” tab, click “Disconnect” if it is already connected.
 - e. Select the “Taskmaster Authentication” option.
 - f. Verify or enter the following values:

User ID: datacap
Password: class
Station ID: 1
 - g. Click Save and then click Connect.
 - h. In the “Rulerunner” tab, click “Start” to start the server.
 - i. Click Close to close the window.

In your server image, verify and if needed, set “upload immediately”

1. In the Internet Explorer browser, open the Datacap Navigator for administrators.
 - a. Click the “DCN-dcAdmin” shortcut or enter the following URL:
<http://ecmedu01:9080/navigator/?desktop=dcadmin>
 - b. Enter the following values:
 User ID: susan
 Password: class
 - c. Click Login. The Datacap Navigator Administration view opens.
2. In the Administration view, select “Workflows” from the left pane.
 - a. In the “Workflows” tab, click “TravelDocs” and click Edit.
 - b. In the “TravelDocs” tab, click “Navigator Job” and click Edit.
 - c. In the “Navigator Job” tab, click “NScan” and click Edit.
 - d. In the “NScan” tab, select “Advanced” tab.
 - e. For the “Start batch panel” section, verify and select the “Upload immediately” option.
 - f. Click Save and Close.
 - g. In the “Navigator Job” tab, click Save and Close.
 - h. In the “TravelDocs” tab, click Save and Close.



3. Logout of Datacap Navigator and close the browser.

System check

The activities in this unit assume that all system services are running when you begin an activity. 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.

- 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.

- Log in using p8admin/IBMFileNetP8.
- 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.

Key	Value
Product Name	IBM Content Navigator
Build Level	icn203.700.725 (201603280144)
Version	2.0.3
Daeja ViewONE Version	4.1.5.0.2.3581
Operating System	Windows Server 2008 R2 6.1

- In the student server image, log in to Datacap Navigator administration desktop as susan/class to verify that the Datacap Server is active and connected.
 - Click the “DCN-dcAdmin” shortcut or enter the following URL:
<http://ecmedu01:9080/navigator/?desktop=dcadmin>
 - Enter the following values:
User ID: susan
Password: class
 - Click Login. The Datacap Navigator administration view opens.
 - If you logged in successfully, then log out and close the browser window.
- In the student server image, check Tivoli Directory Services.
 - 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
4. 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/IBMFfileNetP8
 - 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.
5. See Appendix A for procedures to Start, Check, and Restart components on the student system.

End of exercise

Lesson 4.1. Navigator Updates

Overview

Why is this lesson important to you?

As a Datacap Administrator you migrate applications built on earlier versions of the Datacap product to be compatible with Datacap.

To do this you must be familiar the required application configuration changes.

Activities

[Exercise 1: Datacap Navigator Single Sign On \(SSO\)](#), on page 4-8

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
P8 Administrator	p8admin	IBMFileNetP8
Datacap user	susan	class



Note

Passwords are always case-sensitive.

Exercise 1: Datacap Navigator Single Sign On (SSO)

Introduction

In this activity, you configure an application to allow single sign on for components that honor the Single Sign On capability.



Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.

Procedure

[Procedure 1, "Enable SSO for your application," on page 4-8](#)

[Procedure 2, "Verify SSO configuration," on page 4-9](#)



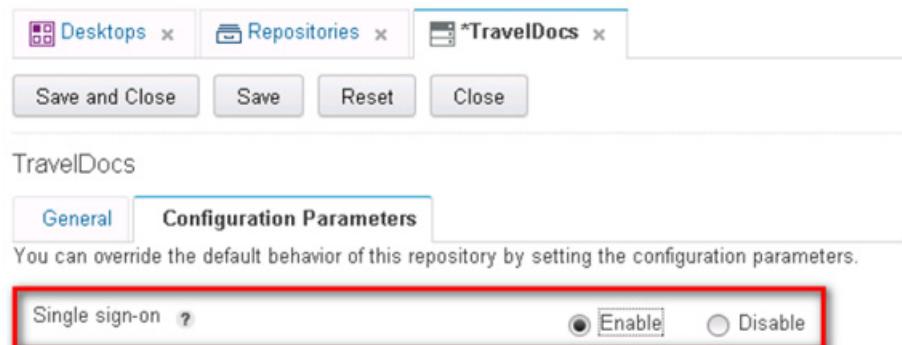
Important

Ensure that you complete the [Do this first](#), on page 4-1 and the [System check](#), on page 4-5 procedure at the beginning of this unit, before starting this lesson.

Procedure 1: Enable SSO for your application

1. Access the IBM Content Navigator administration tool.
 - a. In the Internet Explorer browser, click the ICN-Admin bookmark.
 URL: <http://ecmedu01:9080/navigator/?desktop=admin>
 User name:p8admin
 Password: IBMFileNetP8
 - b. Click Repositories in the left pane.
 - c. In the Repositories tab on the right pane, select the TravelDocs repository and click Edit.
 - d. Select any editable field to allow the “Connect” option to become enabled.
 - e. Scroll down, click Connect and log in to the application.
 User Name: susan
 Password: class
 - f. Click Login. Select the Configuration Parameters tab.

- g. Click Enable for the Single sign-on parameter.



- h. Click "Save and Close".
i. Logout of IBM Content Navigator administration tool.

Procedure 2: Verify SSO configuration

1. Log in to Datacap Navigator Desktop.
 - a. In the Internet Explorer browser, click the DCN-Datacap bookmark:
URL: <http://ecmedu01:9080/navigator/?desktop=desktop>
User name: susan
Password: class
 - b. Click the "Open Browser View" (Drawer) in the left most control panel.
 - c. The Datacap DCExport repository should open directly without being prompted again to provide the p8admin username and password.
 - d. You now see the folders in the DCExport repository.
 - e. Logout and close the Internet Explorer window.

End of exercise

Lesson 4.2. Change Datacap Navigator User Settings

Overview

Why is this lesson important to you?

As a Datacap business user, you process capture workflows in the Datacap Navigator Client.

As a Datacap administrator, you configure User Settings in the Datacap Navigator Client.

To do these tasks effectively, you must be familiar with the Datacap Navigator User Settings.

Activities

- [Exercise 1: Change the User Settings](#), on page 4-11

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	susan	class



Note

Passwords are always case-sensitive.

Exercise 1: Change the User Settings

Introduction

In this activity, you change the options available in User Settings for each task and check the behavior change when you process a Batch.

Procedures

[Procedure 1, "Hide the title bar and shortcuts pane," on page 4-11](#)

[Procedure 2, "Set options for the Scan task in User Settings," on page 4-13](#)

[Procedure 3, "Change the layout for the Scan task," on page 4-14](#)

[Procedure 4, "Configure to submit the batch automatically," on page 4-16](#)

[Procedure 5, "Show only fields with errors for the Verify task," on page 4-16](#)

[Procedure 6, "Configure the Job Monitor view," on page 4-18](#)

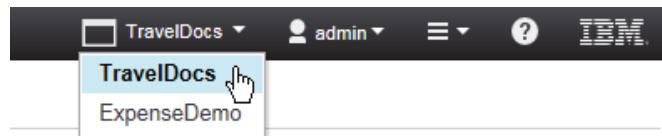


Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.

Procedure 1: Hide the title bar and shortcuts pane

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
User ID: susan
Password: class
 - c. Click Login. The Datacap view opens.
2. In the Datacap Navigator view, verify that the “TravelDocs” application is selected in the banner.
 - a. If not already selected, select “TravelDocs” from the Applications list.



3. Scan a batch to check the default settings for the title bar and the Shortcuts pane.
 - a. Click “Navigator Scan” (Blue down arrow icon) from the Shortcut list on the left.

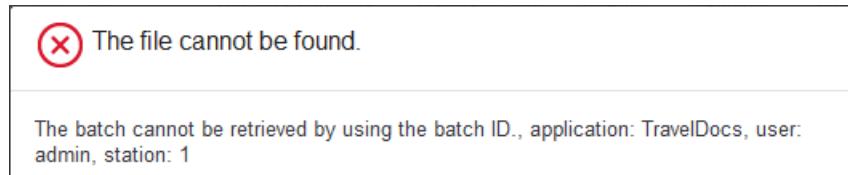


Troubleshooting

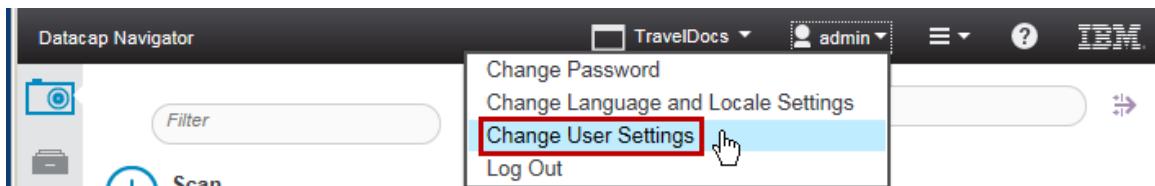
If you are prompted with “Java Update Needed”, select the “Do not ask again...” option and click “Later”.

If you are prompted with any “Security Warning”, select the “Do not show this again...” option and click “Allow”.

If you are prompted with an error as shown in the following screen capture, click “Close”. Click “Cancel” on the “NScan” tab. Restart the browser and open the Datacap Navigator. Then start the Scan again.



- b. Notice that the Shortcuts pane is visible when you start the Scan task.
 - c. Notice the title bars for each widget in blue text: “Scanned Pages (0/0) and “Batch Structure”.
- You are going to change the User Settings to hide the title bars and the Shortcuts pane.
- d. Click “Cancel” in the toolbar to close the “NScan” tab.
4. Edit the User Settings in Global tab.
- a. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.



- b. Verify that the “Global” tab is selected.
 - c. Select the “Hide the title bar in all widgets” and “Hide the Shortcuts pane when you start a task” options.
 - d. Click “Save”.
5. Scan a batch to verify the changes to the user settings for the title bar and the Shortcuts pane.
- a. In the Job Monitor, click “Navigator Scan” from the Shortcut list.



Troubleshooting

If you get an error with a message “this batch can not be created”, close the window, and redo the step.

- b. Verify that the Shortcuts pane is hidden when you start the Scan task.
- c. Verify that the title bars for each widget in blue text (Examples: “Scanned Pages (0/0) and “Batch Structure”) are not visible.



Note

The changes that you made in the “Global” tab of User Settings affect the entire Datacap Navigator client. The Shortcuts pane and the title bars for each widget are hidden for all the tasks in the Datacap Navigator.

- d. Click “Cancel” in the toolbar to close the “NScan” tab.
6. Revert the changes to the User Settings in Global tab.
 - a. To see the widget title bar names again, revert the changes.
 - b. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.
 - c. Clear the “Hide the title bar in all widgets” and “Hide the Shortcuts pane when you start a task” options.
 - d. Click Save.
 - e. If needed, refresh the browser to see the Shortcuts pane.
 - f. Leave the Datacap Navigator open the next procedure.

Procedure 2: Set options for the Scan task in User Settings

1. Scan a batch to check the default settings.
 - a. In the Job Monitor, refresh the browser to see the Shortcut list, if it is not visible.
 - b. Click “Navigator Scan” from the Shortcut list.
 - c. Click “Browse” next to the “Source” field.
 - d. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
 - e. Select the Flight1.tif image.
 - f. Click Open and then click Scan.
2. Verify that image ID is listed in the “Batch Structure” on the right pane, and the image is shown in the viewer on the left.
 - a. Click Submit.

3. Notice that when the current batch is completed, the “Scan” tab is closed, and the Job Monitor page is shown.
You are going to change the User Settings to start the next batch automatically.
4. Edit the User Settings in “Scan” tab.
 - a. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.
 - b. Select the “Scan” tab.
 - c. Select the “Automatically start the next pending batch after the current batch is submitted” option.
 - d. Click “Save”.
5. Scan a batch to verify the changes.
 - a. In the Job Monitor, click “Navigator Scan” from the Shortcut list.
 - b. Click “Browse” next to the “Source” field.
 - c. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
 - d. Select the `Car1.tif` image and click Open.
 - e. Click Scan.
 - f. Click Submit.
6. Notice that when the current batch is completed, the “Scan” tab is opened again to start the next batch.
 - a. Click Cancel to close the “NScan” tab.
7. Reset the changes to the User Settings in Scan tab.
 - a. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.
 - b. Select the “Scan” tab.
 - c. Clear the “Automatically start the next batch after the current batch is submitted” option.
 - d. Leave the “User Settings” window open for the next procedure.

Procedure 3: Change the layout for the Scan task

1. In the “User Settings” window, the “Scan” tab is already opened.
 - a. Select the “Layout” subtab.
 - b. Select the “Customize the layout” option.
 - c. Observe that the layout can be applied to all Scan tasks in your system or to a specific one.
 - d. Verify and if needed select the “Apply to this task” option.

Change the layout by dragging and dropping widgets.

Batch Structure Start Panel Image Viewer

Restore Defaults

- e. Drag the widgets (blue boxes) to rearrange their position.



Important

You can move a widget to an “empty” box (gray colored) only and not the one that has a widget already (blue colored).

- f. As an example, in the screen capture, “Batch Structure” is moved to the far left and “Image Viewer” is moved to the far right.
 - g. Click “Save”.
2. Scan a batch to verify the changes.
 - a. In the Job Monitor, click “Navigator Scan” from the Shortcut list.
 - b. Click “Browse” next to the “Source” field.
 - c. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
 - d. Select the Flight1.tif image and click Open.
 - e. Click Scan.
 3. Verify that the new layout that you configured.
 - a. The “Batch Structure” widget (ID list) is shown on the left.
 - b. The “Image Viewer” widget (scanned image) is shown on the right.
 - c. Click Submit to complete the scan.
 - d. Leave the Datacap Navigator open for next procedure.



Information

The layout for the “Classify” and “Verify” pages can be customized in the User settings. The steps are similar to the [Procedure 3, "Change the layout for the Scan task," on page 4-14](#).

Procedure 4: Configure to submit the batch automatically

This setting is already done on your student image for the other labs to be able to process the batches. In this procedure, you verify this configuration in the User Settings.

1. In the Datacap Navigator, open the User Settings.
 - a. From the banner area, click the down-arrow, next to the user name and select “Change User Settings”.
 - b. The “Settings” window opens.
2. Edit the User Settings in Upload tab.
 - a. Select the “Upload” tab.
 - b. Verify that the “Automatically submit the batch after uploading” option is selected. If not, select the option.

Settings						
Global	Scan	Upload	Classify	Verify	Job Monitor	Task List
<input checked="" type="checkbox"/> Automatically submit the batch after uploading ? <input type="checkbox"/> Automatically start the next pending batch after the current batch is submitted						

- c. Click “Save”. This configuration enables the system to submit the batch automatically after the upload.
- d. Leave Datacap Navigator opened for the next procedure.

Procedure 5: Show only fields with errors for the Verify task

1. Check the default settings for the Verify task.
 - a. In the Job Monitor, refresh the browser.
 - b. Select a batch that is in the “pending” state at the Verify task from the list. (Do not use the batches in the Hold state.)
 - c. Skip to Step 8 in this procedure.
 - d. If there is no pending batch at the Verify task available in the list, create a batch with the steps in the “Hint” section.



Hint

Create a batch and process it up to the Verify task. Do Steps 2-7.

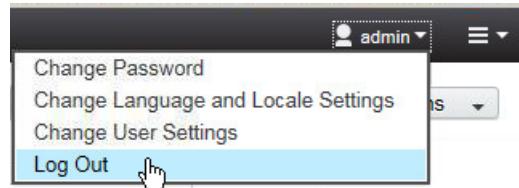
2. Scan a batch.
 - a. Click "Scan" from the Shortcut list.
 - b. Click "Browse" next to the "Source" field.
 - c. In the "Choose File to Upload" window, go to C:\Datacap\TravelDocs\images
 - d. Select the Flight1.tif image and click Open.
 - e. Click Scan.
3. Verify that image ID is listed in the "Batch Structure" and the image is shown in the viewer and click Submit.
4. The NUpload task runs automatically.
 - a. It processes the batch and uploads the file.
5. The "PageID" and "Profiler" tasks are configured to run automatically.
6. It takes a few seconds. Refresh the list in the Job Monitor view.
7. Verify that your batch is now in the pending state for the "Verify" task. The Batch has today's date.

8. Double-click your batch to open the Verify task.
9. In the "Verify" tab, check the fields that are listed in the "Field Details" pane (middle column).
 - a. All the fields that are in the document are shown.

After you configure in User Settings, only the fields that have errors are shown.
10. Open the "User Settings" window and select the "Verify" tab.
 - a. In the "General" subtab, select the "Show only fields that have errors" option.
 - b. Click "Save".
11. Check the new configuration for the Verify task.
 - a. If the task is not opened, select the same batch with Verify task that you checked before configuring the "Verify" tab in "User Settings".
 - b. Check the fields that are listed in the "Field Details" pane (middle column).
 - c. Verify that only the fields that have errors are shown.
12. Reset the change to the User Settings.
 - a. Open the "User Settings" window and select the "Verify" tab.
 - b. In the "General" subtab, clear the "Show only fields that have errors" option.
 - c. Click "Save" and close the "User Settings" window.
13. Complete the Verify step or close the Verify tab.

Procedure 6: Configure the Job Monitor view

1. Check the default settings in Job Monitor.
 - a. In the Job Monitor, check the order of “Batch”, “Job”, “Task”, “Status”, and “Job Start” columns.
 - b. Scroll to the right and check the “Job Time” and “Pages” columns.
You are going to change the order of the columns and remove some columns in the User Settings to change the display in Job Monitor.
2. Open the “User Settings” window and select the “Job Monitor” tab.
 - a. Move the “Pages” columns from the “Selected Columns” to “Available Columns”. Use the backward arrow.
This step removes the specified columns in Job Monitor.
 - b. In the “Selected Columns”, move the “Job” down after “Task”. Use the down arrow.
 - c. Move the “Job Time” up to after “Job Start”. Use the down arrow.
 - d. Click “Save”.
3. Check the new configuration in Job Monitor.
 - a. Verify that the order of “Queue ID”, “Batch”, “Job”, “Task”, “Status”, and “Job Start” columns is changed to “Queue ID”, “Batch”, “Task”, “Job”, “Status”, “Job Start”, and “Job Time”.
 - b. Scroll to the right and verify that the “Pages” columns is removed from the display.
4. Log out of Datacap Navigator and close the window.



End of exercise

Lesson 4.3. Configure Users and Groups

Overview

Why is this lesson important to you?

As an administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0 system.

You must configure security users and groups for Datacap system.

Activities

[Exercise 1: Create Users and Groups](#), on page 4-20

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap Desktop	susan	class



Note

Passwords are always case-sensitive.

Exercise 1: Create Users and Groups

Introduction

In the administration View, you configure Workflows, Groups, Users, Stations, Shortcuts, and Panels.

As an administrator, you can create users and groups, and set permissions and privileges.

Procedures

[Procedure 1, "Open the Administrator view," on page 4-20](#)

[Procedure 2, "Create a user and a group," on page 4-20](#)



Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.



Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first, on page 4-1](#) section at the beginning of this unit.

Procedure 1: Open the Administrator view

1. In the Internet Explorer browser, open the Datacap Navigator for administrators.
 - a. Click the “DCN-dcAdmin” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=dcadmin`
 - b. Enter the following values:
User ID: susan
Password: class
 - c. Click Login. The Datacap Navigator Administration view opens.

Procedure 2: Create a user and a group

1. In the Administration view, select “Users” from the left pane.
 - a. In the “Users” tab, click “New User”.
 - b. In the “New User” tab, enter a name for the user (Example: test1).
 - c. Enter a password for the “Password” and the “Retype Password” fields (Example: test1).
 - d. Click “Save and Close”.
 - e. Verify that the user that you created is listed in the “Users” tab.

**Note**

You are going to add this user to a group and set Permissions and Privileges in the Group.

2. Select “Groups” from the left pane.
 - a. In the “Groups” tab, click “New Group”.
 - b. In the “New Group” tab, enter a name for the Group (Example: Testers).
3. Add the user that you created to the group.
 - a. Select the “Users” subtab.
 - b. Move the “test1” user from the “Available Users” pane to the “Selected Users” pane. Use the forward arrow.
4. Set permissions to the group.
 - a. Select the “Permissions” subtab.
 - b. Select the “NScan”, “NUpload”, “PageID”, “Profiler”, and “Export” tasks for the “Navigator Job” as shown in the following screen capture.

Group: New Group

General	Users	Permissions	Privileges
Specify permissions to one or more applications and tasks.			
Applications and Tasks	Description		
<input type="checkbox"/> TravelDocs			
<input type="checkbox"/> Main Job	Main Job		
<input type="checkbox"/> Fixup Job	Fixup Job		
<input type="checkbox"/> Web Job	Web Job		
<input type="checkbox"/> Navigator Fixup Job			
<input type="checkbox"/> Nfixup	Fixup with Navigator client		
<input type="checkbox"/> Navigator Job	Navigator Job for new client		
<input checked="" type="checkbox"/> Scan	Scan with Navigator Client		
<input checked="" type="checkbox"/> NUpload	Upload with Navigator Client		
<input checked="" type="checkbox"/> PageID	Page Identification Rules		
<input checked="" type="checkbox"/> NProfiler	Recognize/Validate w/Rules		
<input type="checkbox"/> NVerify	Verify with Rule Validation		
<input checked="" type="checkbox"/> Export	Export via Rules		

5. Set privileges to the group.
 - a. Select the “Privileges” subtab.

- b. Select the following components under the “Job Monitor”:
 - “View Job Monitor”
 - “Status change or rollback”
 - “Batch attributes change”,
 - “Change Job attributes”
- c. Select the “Datacap Web and Datacap Navigator” component under the “Clients”:
- d. The completed page looks like the following screen capture.

Group: New Group

General	Users	Permissions	Privileges
Specify privileges to one or more components or functions.			
<input type="checkbox"/> Component <ul style="list-style-type: none"> <input type="checkbox"/> Job Monitor <input checked="" type="checkbox"/> View Job Monitor <input type="checkbox"/> More than one Job Monitor <input type="checkbox"/> Delete batches <input checked="" type="checkbox"/> Status change or rollback <input type="checkbox"/> Priority or operator change <input checked="" type="checkbox"/> Batch attributes change <input checked="" type="checkbox"/> Change Job Attributes <input type="checkbox"/> Save layout or set filter <ul style="list-style-type: none"> ▶ Administrator <input type="checkbox"/> Clients <ul style="list-style-type: none"> <input type="checkbox"/> Report Viewer <input checked="" type="checkbox"/> Datacap Web and Datacap Navigator <input type="checkbox"/> Datacap Studio <input type="checkbox"/> Web Monitor 			

- e. Click “Save and Close”.
 - f. Verify that the group that you created is listed in the “Groups” tab.
6. Log out the Datacap Navigator and close the browser.



Information

Users who are created in the application can be used only in the TMA authentication mode. Since you are using LDAP method for all the labs in this unit, we cannot test them in this mode.

End of exercise

Lesson 4.4. Enable Rescan for the Verify task

Overview

Why is this lesson important to you?

As an administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0 system.

You enable Rescan for the Verify and Nfixup tasks.

Activities

[Exercise 1: Enable Rescan for the Verify task](#), on page 4-24

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap Desktop	susan	class



Note

Passwords are always case-sensitive.

Exercise 1: Enable Rescan for the Verify task

Introduction

You can rescan documents in the Verify task. By default, the Rescan option is not visible on the task page.

As an administrator, you configure the rescan in the Administration View.

Procedures

[Procedure 1, "Check the default settings in Datacap Navigator," on page 4-24](#)

[Procedure 2, "Configure rescan in Datacap Navigator," on page 4-25](#)

[Procedure 3, "Test the rescan option," on page 4-26](#)



Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.



Important

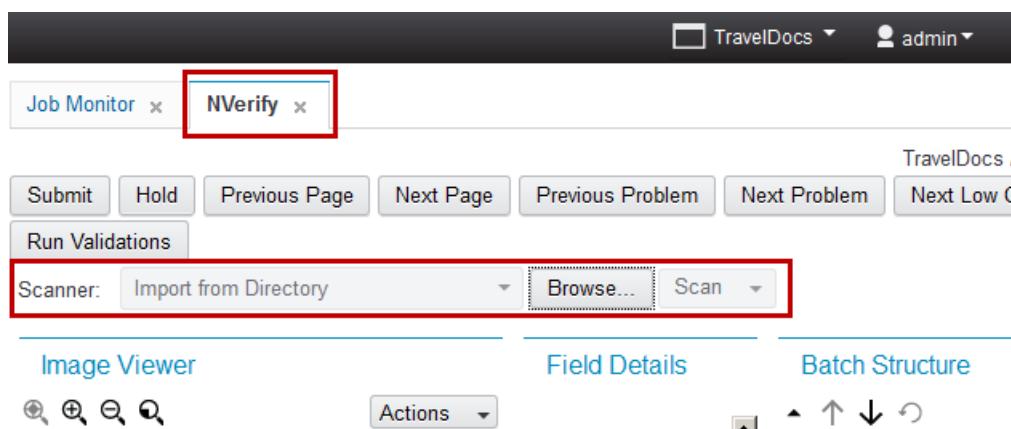
If they are not already started, start the Datacap system components. Use the instructions in the [Do this first, on page 4-1](#) section at the beginning of this unit.

Procedure 1: Check the default settings in Datacap Navigator

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
User ID: `susan`
Password: `class`
2. Click Login. The Datacap view opens.
3. Make sure TravelDocs application is selected.
 - a. In the banner, verify or select TravelDocs from the Applications list.
4. In the Job Monitor, open a batch that is in the Verify task. Skip to Step 6. If you don’t have a batch, follow Steps 4-5 to scan and process a batch.
5. Scan a batch.
 - a. In the Job Monitor, click “Navigator Scan” (Blue down arrow icon) from the Shortcut list on the left.
 - b. Click “Browse” next to the “Source” field.

- c. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
 - d. Select the car1.tif image.
 - e. Click Open and then click Scan.
 - f. Verify that image ID is listed in the “Batch Structure” on the right pane, and the image is shown in the viewer on the left.
 - g. Click Submit.
6. When the batch is completed, the “Scan” tab is closed, Upload, Page ID and Profiler task runs automatically. All the three steps take a few moments.
- a. In the Job Monitor page, click Refresh to see the status of your batch. Check that it is in Verify task.
 - b. Double-click your batch to open the Verify task.
7. In the Verify tab, check that scan option for rescanning is not available.
- a. In the next procedure, you are going to enable this option.

The following screen capture shows the Scan widget that becomes available in the Verify task after enabling the scan.

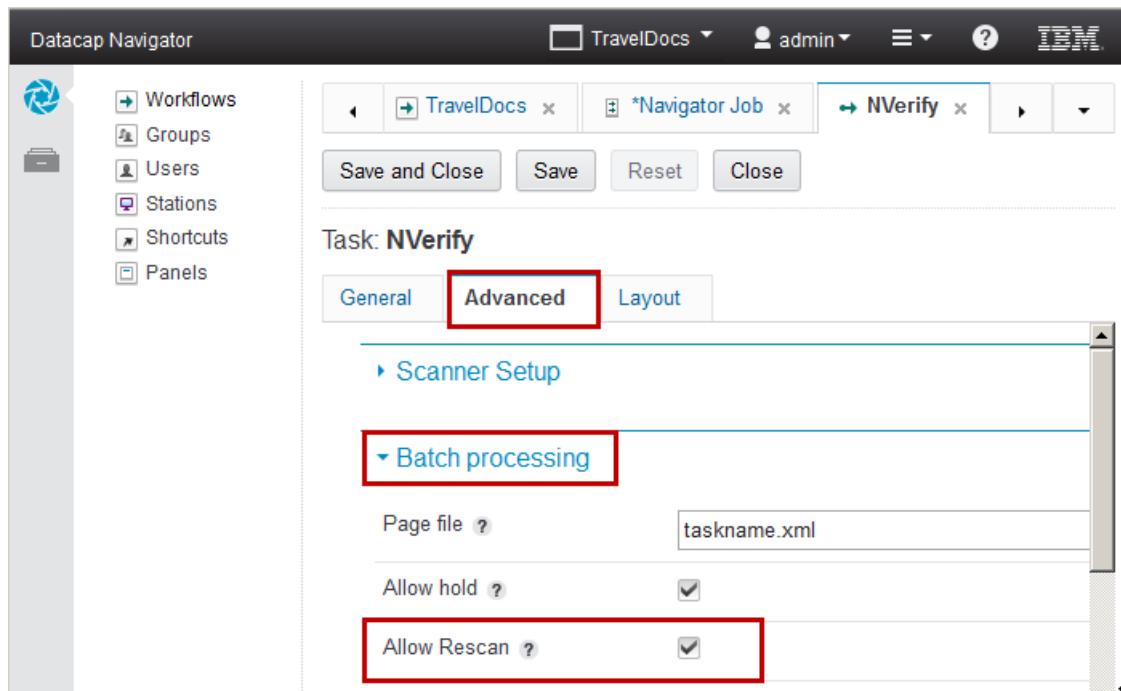


- b. Close the Verify task.
- c. Log out of Datacap Navigator.

Procedure 2: Configure rescan in Datacap Navigator

1. In the Internet Explorer browser, open the Datacap Navigator for administrators.
 - a. Click the “DCN-dcAdmin” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=dcadmin`
 - b. Enter the following values:
User ID: susan
Password: class
 - c. Click Login. The Datacap Navigator Administration view opens.

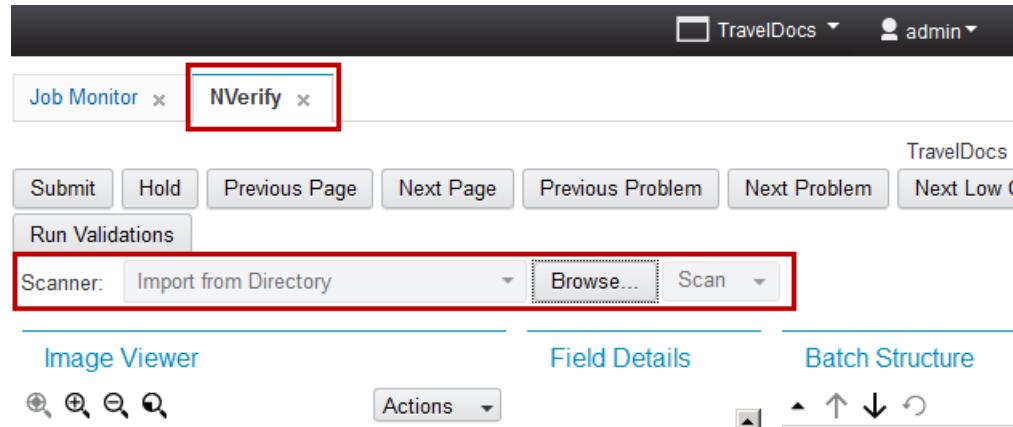
2. In the Datacap Navigator Administration view, select the “Workflows” tab.
 - a. In the Workflows tab, select “TravelDocs” and click Edit.
 - b. In the “TravelDocs” tab, select “Jobs” subtab.
 - c. In the “Jobs” subtab, select “Navigator Job” and click Edit.
 - d. In the “Navigator Job” tab, select the “Tasks” subtab.
3. In the “Tasks” subtab, select “Verify” and click Edit.
 - a. In the “Verify” tab, select “Advanced” subtab.
 - b. In the “Batch processing” section, select the “Allow Rescan” option.



4. Click “Save and Close” on the following tabs to save the changes.
 - Verify
 - Navigator Job
 - TravelDocs
5. Log out the Datacap Navigator and close the browser.

Procedure 3: Test the rescan option

1. Repeat [Procedure 1, "Check the default settings in Datacap Navigator,"](#) on page 4-24 to open a batch that is in the Verify task.
2. In the Verify tab, check that the rescan option is available.



3. Check the Batch structure.

- It has one page (pageType: Car rental agreement).

Batch Structure	
ID	Type
20151112.000007	TravelDocs
20151112.000007.01	Car_Rental
TM000001	Rental_Agreement

4. Rescan a document.

- Click “Browse” next to the “Scanner” field.
 - In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
 - Select the car1.tif image and click Open.
 - Click “Scan” and select “Insert”. You can also select the “Replace” or “Append” options.
 - Verify that image ID is listed in the “Batch Structure” on the right pane, and the image is shown in the viewer on the left. Now the Batch structure contains 2 pages.
 - Click Submit.
 - If needed, select Submit again for the second image.
5. In Job Monitor, if you are batch is at Upload task, click the “Upload” shortcut to complete the upload.
6. Optional: Verify that the batch advances to the Export task and to the Job Done status.
7. Log out of the Datacap Navigator.

Procedure 4: Verify the rescan setup in the tmweb client

The Rescan configuration that you did in Datacap Navigator admin client can be checked in the tmweb client.

1. In the Internet Explorer browser, open the tmweb client.
 - a. Enter the following URL: <http://ecmedu01:9080/tmweb.net/>
 - b. Enter or select the following values:

Application: TravelDocs
 User ID: susan
 Password: class
 Station: 1
 - c. Click Login. The tmweb view opens.
2. Open the settings for Verify task.
 - a. Click the “Administrator” tab.
 - b. Expand the “Navigator Job” and click the “Verify” task.
 - c. Click “Setup” in the right pane.
 - d. In the “Verify.set.xml” window, check that the “Allow Rescan” option is selected in the “Batch Processing” section.



- e. Close the Setup window, log out of the tmweb client, and close the browser.

End of exercise

Lesson 4.5. Create Custom Panels

Overview

Why is this lesson important to you?

As an administrator of an IBM Datacap capture system, you must be familiar with all configuration tasks for a functional IBM Datacap 9.0 system.

You must create custom panels and associate them with a task.

Activities

[Exercise 1: Create a custom Panel for a task](#), on page 4-30

[Exercise 2: Modify the custom panel in the panel data file \(optional\)](#), on page 4-37

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap Desktop	susan	class



Note

Passwords are always case-sensitive.

Exercise 1: Create a custom Panel for a task

Introduction

A panel is a user interface for data entry. Example: the Start Batch panel on the Scan task, and the Field Details panel in the Verify task.

The system generates the panels dynamically and it does not require any extra setup. If you want to create your own layout, you can create Custom Panels. You can rearrange the fields and change the appearance and behavior of the panel in various ways.

In this activity, you create a new panel for “Verify”, and assign the panel to the Verify task.

Procedures

[Procedure 1, "Create a batch with a rental car agreement," on page 4-30](#)

[Procedure 2, "Check the default Panel for Verify task," on page 4-31](#)

[Procedure 3, "Create a Custom Panel," on page 4-32](#)

[Procedure 4, "Assign the custom panel to a task," on page 4-35](#)

[Procedure 5, "Test the Custom Panel," on page 4-35](#)



Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.



Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first, on page 4-1](#) section at the beginning of this unit.

Procedure 1: Create a batch with a rental car agreement

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
User ID: `susan`
Password: `class`
 - c. Click Login.
2. In the Datacap Navigator view, verify that the “TravelDocs” application is selected in the banner.
 - a. If not selected, select “TravelDocs” from the Applications list.

3. Scan a batch.
 - a. Click “Navigator Scan” from the Shortcut list.
 - b. Click “Browse” next to the “Source” field.
 - c. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
 - d. Select the car1.tif image and click Open.
 - e. Click Scan.
4. Verify that image ID is listed in the “Batch Structure” and the images is shown in the viewer.
 - a. Click Submit.
5. In Job Monitor, if your batch is at Upload task, click the “Upload” shortcut to complete the upload.
6. The “PageID” and “batch Profiler” tasks are configured to run automatically.
7. In the Job Monitor, from the list, select the batch that you created. The Batch has today’s date and Task name is Batch Profiler.
8. Refresh the list in the Job Monitor view.
9. Verify that your batch is now in the pending state for the “Verify” task. The Batch has today’s date.
 - a. Double-click it to open in the Verify tab.
 - b. Leave the browser open for the next procedure.

Procedure 2: Check the default Panel for Verify task

1. The Verify tab is opened from the previous procedure.
 - a. Check the default panel for the Verify task.
 - b. Notice that in the Field Details panel (in the middle), some of the system generated fields that are not used for this application. They are shown in red box in the following screen capture.
 Example: “Stick Text Field”, “Text_Field”
 When you configure a custom panel, you are going to remove these fields.
2. You are also going to rearrange the fields such as “Pickup_Date”. They are shown in green box in the following screen capture.

The screenshot shows the Datacap Navigator interface in the 'Verify' tab. The top navigation bar includes 'Job Monitor', 'Verify', 'Submit', 'Hold', 'Previous Page', 'Next Page', 'Previous Problem', 'Next Problem', 'Next Low Confidence', and 'Run Validations'. The banner indicates 'TravelDocs / Navigator Job / Verify'. The left pane features an 'Image Viewer' with various icons and a preview of a 'Car Rental #1' document. The right pane is divided into three sections: 'Field Details' (containing 'Stick Text Field' and 'Text_Field' boxes), 'Batch Structure' (listing items like '20150422.000000' and 'TM000001'), and a bottom section showing 'Pickup_Date' (Mon, Oct 4, 2010) and 'Pickup_Location' (New York (JFK)). The 'Pickup_Location' field has a yellow highlight.

- Log out of the Datacap Navigator and close the browser.

Procedure 3: Create a Custom Panel

- In the Internet Explorer browser, open the Datacap Navigator for administrators. For details, see [Procedure 1, "Open the Administrator view,"](#) on page 4-20
- In the Datacap Navigator administration view, verify that the "TravelDocs" application is selected in the banner.
 - If not selected, select "TravelDocs" from the Applications list.
- Select "Panels" on the left pane.
 - The "Panels" tab opens in the right pane.

The list is empty. It is going to be populated after you complete your custom panel.
- Create a custom panel.
 - Click "New Panel" and select "Verification Panel" from the list.
 - Verify that "TravelDocs" is selected for the "Workflow" field.
 - For the "Page Type" field, select "Rental_Agreement" from the list.

The Panel Designer with the "Design" tab (at the end of the page) opens.
The default panel layout is constructed in the middle pane.

 - For the "Name" field, enter "EDUVerifyCustomPanel".

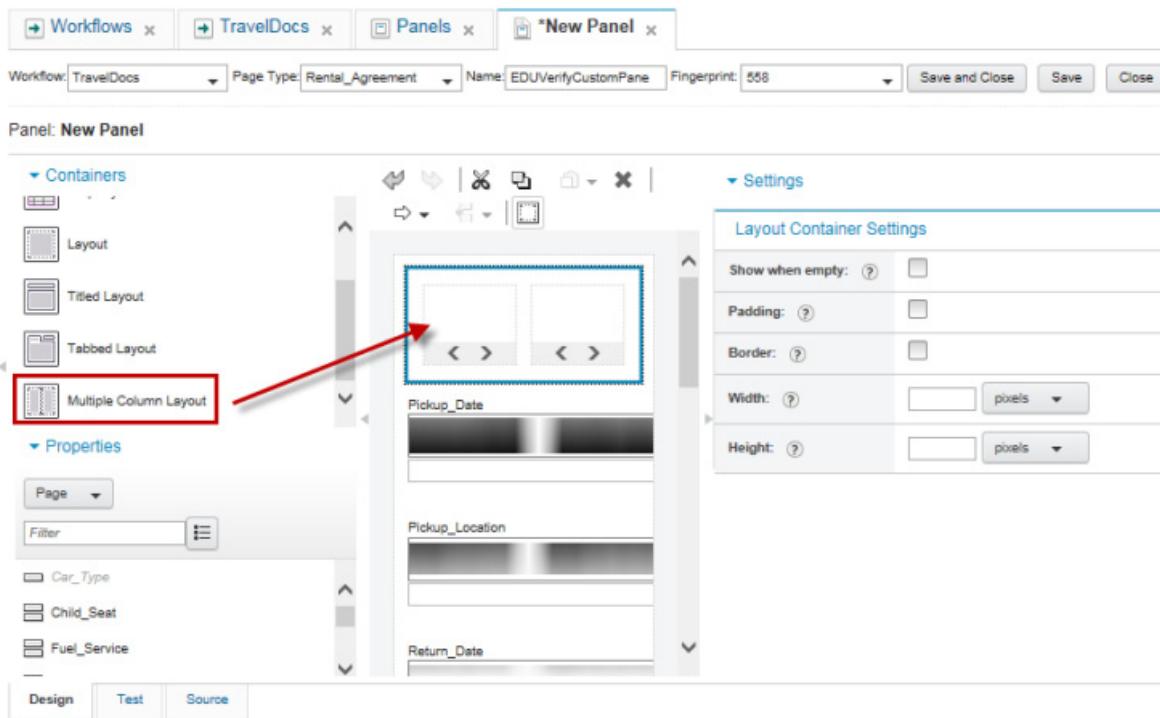
- e. For the “Fingerprint” field, select 558 from the list.
5. Maximize the browser to clearly see the fields in the middle pane in the design tab.
6. Delete the following system generated fields that are not required for this lab.
 - Sticky Field
 - Text Field
 - Options Field



Hint

You can right-click each field, and select Delete from the list. Or you can select many fields with control and click and then select the Delete icon in the toolbar in the middle pane.

7. Scroll down and select the “Multi-Column Layout” icon from the “Containers” list on the left column of the Design tab.
- a. Drag it to the center panel and place it above the “Pickup_Date” field as shown in the following screen capture.



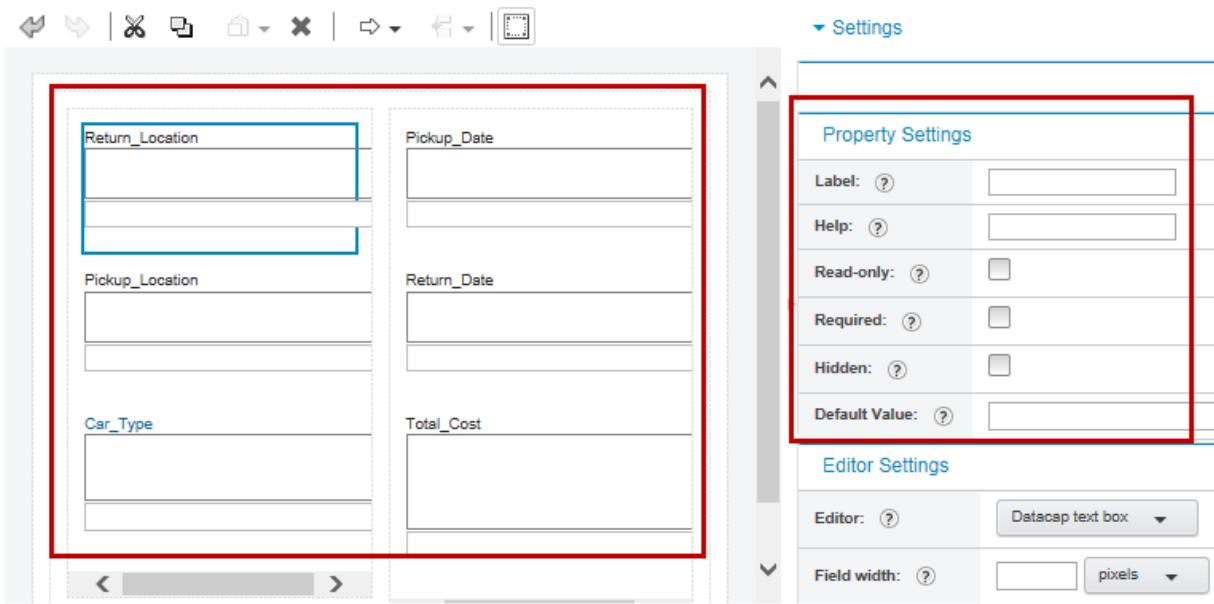
8. Drag the Pick_Date, Pickup_Location, Return_Date, Return_Location, Car_Type, and Total_Cost fields into the Multi-Column Layout.



Note

By default, all fields are listed vertically. You can rearrange the panel by dragging the fields.

9. A sample of a custom Verification panel is shown in the following screen capture.
 - a. Your panel might look different depending on where you dragged the fields.



10. Select a field (in the screen capture above, the “Return_Location” is selected).
 - a. Notice that you can configure a field to be “Read-only”, “required”, “Hidden”, or assign a default value in the “Property Settings” pane.



Note

In the next lesson, you are going to configure the fields by using an External Data Service.

-
11. Click “Save and Close”.
 - a. Verify the new panel that you created is listed in the “Panels” tab.

Configure panels for the scan client, verify client, and batch editor.				
New Panel		Edit	Copy	Delete
	ID	Panel Name	Page Type	Workflow
<input checked="" type="checkbox"/>	1	EDUVerifyCustomPanel	Rental_Agreement	TravelDocs



Information

You can also create custom panels for the Start Batch panel and the Batch Editor panel. For the Start Batch Panel, the DCO Type on the Scan task advanced properties is TravelDocs. For the Batch Editor, there is no need to configure tasks settings, the system fetches the last Batch Editor panel that is created for the application.

Procedure 4: Assign the custom panel to a task

1. Open the “Verify” task.
 - a. In the Workflows tab, select “TravelDocs” and click Edit.
 - b. In the “TravelDocs” tab, select “Jobs” subtab.
 - c. In the “Jobs” subtab, select “Navigator Job”, and click Edit.
 - d. In the “Navigator Job” tab, select “Tasks” subtab.
 - e. In the “Tasks” subtab, select “Verify”, and click Edit.
2. Assign the custom panel to the task.
 - a. In the “Verify” tab, select the “Advanced” tab.
 - b. In the “Advanced” tab, scroll down to the “Custom web panels” section.
 - c. Select the “Use custom web panels” option.
 - d. Replace the existing text and enter `Rental_Agreement` and then `EDUVerifyCustomPanel` for the “Panel for” field.

Custom web panels

Use custom web panels ?	<input checked="" type="checkbox"/>
Bind TYPE to ascx panel ?	
Panel for	<code>Rental_Agreement</code>
:	
<code>EDUVerifyCustomPanel</code>	

3. Click “Save and Close” in the “Verify” tab.
 - a. Click “Save and Close” in the “Navigator Job” tab.
 - b. Click “Save and Close” in the “TravelDocs” tab.
4. Logout of Datacap Navigator and close Internet Explorer.

Procedure 5: Test the Custom Panel

1. In the Datacap Navigator for business users, create a batch and process it. For detailed instructions, refer to the [Procedure 1, "Create a batch with a rental car agreement,"](#) on page 4-30.

2. The Verify tab is opened.
 - a. Observe that the custom panel is used in for “Field Details” for the Verify task.
 - b. Check that in the Field Details panel (in the middle), the system generated fields are not shown since you deleted them for the custom panel.

Example: “Stick Text Field”, “Text_Field”
3. Verify that the fields such as “Return Location” and “Pickup_Date” are rearranged as you designed.

Field Details	
Return_Location	Pickup_Date
New York (JFK)	Mon, Oct 4, 2010
New York (JFK)	Mon, Oct 4, 2010
Pickup_Location	Return_Date
New York (JFK)	Fri, Oct 8, 2010
New York (JFK)	Fri, Oct 8, 2010
Car_Type	Total_Cost
Full size	\$582.77
	582.77

4. Log out of the Datacap Navigator and close the browser.

End of exercise

Exercise 2: Modify the custom panel in the panel data file (optional)

Introduction

The panel designer supports the layout of fields that are designed in Datacap Studio. You can further modify the custom panel that you created in the designer to add other User Interface elements. Example: Add a logo image to your custom panel.

The system generates a file to store the data for each panel. To modify a panel, you edit this file. In this activity, you edit the file to add a logo.

Procedures

[Procedure 1, "Edit the panel data file," on page 4-37](#)

[Procedure 2, "Test the changes to the panel," on page 4-38](#)

Procedure 1: Edit the panel data file

Panel data files are stored within their corresponding Datacap application folder.

1. In Windows Explorer, go to the following folder:

C:\Datacap\TravelDocs\navigatorpanel\panels\

2. Open the “eduverifycustompanel” file in Notepad++. When you created a custom panel, the system generated this file.



Note

This file contains the html_markup value that the panel designer generates and it is a standard Dojo widget template. You modify it to add an element into the panel. You add the URL of an image file that displays an IBM logo image on top of the panel.

3. Add the following html markup code to the file “html_markup”:

```
<img src=\"http://\\ecmedu01:9080\\navigator\\DCNIBMLogo.png\" />
```

There should be no extraneous new line characters in the file.



Hint

The `HTMLPathforImage.txt` file in the C:\DC9-Lab Exercises\Custom Panel folder contains the html code. You can also copy and paste the text from this file.



Information

An image file for the banner logo is already copied into the C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\P8Node01Cell\navigator.ear\navigator.war\DCNImages folder.

- The completed file looks like the one in the following screen capture. The added code is highlighted in green:

```

C:\Datacap\TravelDocs\navigatorpanel\panels\eduverifycustompanel - Notepad++ [Administrator]
File Edit Search View Encoding Language Settings Macro Run Plugins Window ?
eduverifycustompanel x
1 {"fp_id": "558", "panel_ind": "7", "panel_name": "EDUVerifyCustomPanel", "page_type": "Rental_Agree
html_markup": "<img src='http://ecmedu01:9080/navigator/DCNImages/DCNIBMLogo.png' /><d
data-dojo-type=\\"pxr\\widget\\Layout\\"><div
data-dojo-type=\\"pxr\\widget\\MultiColumnContainer\\"><div
data-dojo-type=\\"pxr\\widget\\Layout\\"><div data-dojo-type=\\"pxr\\widget\\Property\\"
data-dojo-props=\\"binding: 'DC_Page.Return_Location', editor: 'datacapweb\\widget\\editors\\DCI
Editor'\\\"></div><div data-dojo-type=\\"pxr\\widget\\Property\\"
data-dojo-props=\\"binding: 'DC_Page.Pickup_Location', editor: 'datacapweb\\widget\\editors\\DCI
Editor'\\\"></div><div data-dojo-type=\\"pxr\\widget\\Property\\"
data-dojo-props=\\"binding: 'DC_Page.Car_Type', editor: 'datacapweb\\widget\\editors\\DCITextBox
\\\"></div><div data-dojo-type=\\"pxr\\widget\\Layout\\"><div
data-dojo-type=\\"pxr\\widget\\Property\\"
data-dojo-props=\\"binding: 'DC_Page.Pickup_Date', editor: 'datacapweb\\widget\\editors\\DCIText
or'\\\"></div><div data-dojo-type=\\"pxr\\widget\\Property\\"
data-dojo-props=\\"binding: 'DC_Page.Return_Date', editor: 'datacapweb\\widget\\editors\\DCIText
or'\\\"></div><div data-dojo-type=\\"pxr\\widget\\Property\\"
data-dojo-props=\\"binding: 'DC_Page.Total_Cost', editor: 'datacapweb\\widget\\editors\\DCITextB
r'\\\"></div></div></div></div>","markup_resources": "{}", "workflow_ind": "TravelDocs" }

```

- Save and close this file.

Procedure 2: Test the changes to the panel

- In the Datacap Navigator for business users, create a batch and process it up to Verify step. For detailed instructions, refer to the [Procedure 1, "Create a batch with a rental car agreement,"](#) on page 4-30.
 - Open the Verify task.
 - In the Verify tab, verify that a logo is added at the top of the "Field Details" panel in the middle section as shown in the following screen capture.

Job Monitor Verify

Submit Hold Previous Page Next Page Previous Problem TravelDocs / Navigator Job / Verify
Next Problem Next Low Confidence Run Validations

Image Viewer

Field Details

	Return_Location New York (JFK) New York (JFK)	Pickup_Date Mon, Oct 4, 2010 Mon, Oct 4, 2010
Pickup_Location New York (JFK) New York (JFK)	Return_Date Fri, Oct 8, 2010 Fri, Oct 8, 2010	
Car_Type Full size	Total_Cost \$582.77 582.77	

Batch Structure

```

ID
  20150422.0
    20150422.0
      TM00
  
```

2. Close the task.
 - a. Click Hold.
 - b. Log out of Datacap Navigator and close the browser.

End of exercise

Lesson 4.6. Implement External Data Services

Overview

Why is this lesson important to you?

As a Datacap system administrator, you customize the Datacap Navigator. One of the aspects in customization is implementing External Data Services (EDS).

To do these tasks effectively, you must be familiar with registering the EDS plug-in and modifying the sample EDS files.

Activities

- [Exercise 1: Register Datacap Navigator EDS plug-in](#), on page 4-41
- [Exercise 2: Customize Datacap Navigator Job Monitor](#), on page 4-45
- [Exercise 3: Configure data validation for a field](#), on page 4-47
- [Exercise 4: Create Choice Lists with Sample EDS](#), on page 4-52

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	susan	class



Note

Passwords are always case-sensitive.

Exercise 1: Register Datacap Navigator EDS plug-in

Introduction

The External Data Services (EDS) web application must be deployed before configuring the plug-in. This deployed EDS must be linked to IBM Content Navigator where you register and configure the EDS plug-in (edsPlugin) in the admin tool.

The sample EDS is already deployed on WebSphere Application Server in your student system. In this lab exercise, you register the EDS plug-in in the IBM Content Navigator.

Procedures:

[Procedure 1, "Check the default behavior in Job Monitor," on page 4-41](#)

[Procedure 2, "Check the sample EDS deployment," on page 4-42](#)

[Procedure 3, "Register the EDS plug-in," on page 4-42](#)



Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.



Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first, on page 4-1](#) section at the beginning of this unit.

Procedure 1: Check the default behavior in Job Monitor

After implementing EDS, the Job Monitor page shows a customized user interface. In this procedure, you check the default behavior before the customization.

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
User ID: susan
Password: class
 - c. Click Login. The Datacap view opens.
2. In the Job Monitor, check the default behavior for a cell or a column.
 - a. In the following screen capture, the “Status” column shows all the values in the same style. With the EDS implementation, you can customize a cell to highlight a status value. (Example: “aborted”).

- b. The “Job Time” column shows the values as numbers.

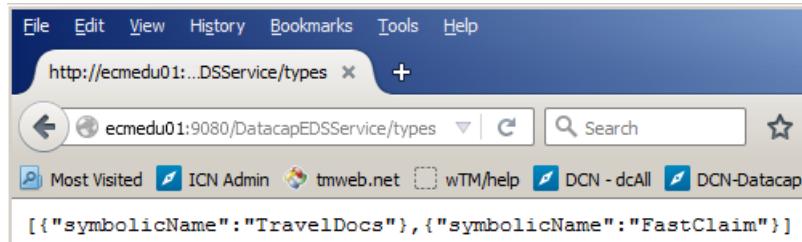
With the EDS implementation, you can customize a column to show a progress bar.

	Queue ID	Batch	Job	Task	Status	Job Start	Job Time
11	20151021.00000	Navigator Job	Scan	hold	10/21/2015, 1:23 AM	12	
10	20151021.00000	Navigator Job	NVerify	running	10/21/2015, 12:46 AM	2454	
9	20151020.00000	Navigator Job	Scan	hold	10/20/2015, 10:33 PM	693	
8	20151020.00000	Navigator Job	Scan	aborted	10/20/2015, 9:03 PM	1236	
7	20151020.00000	Navigator Job	Scan	running	10/20/2015, 8:58 PM	0	
6	20151020.00000	Navigator Job	Scan	hold	10/20/2015, 8:26 PM	1379	
5	20151020.00000	Navigator Job	Scan	running	10/20/2015, 8:10 PM	0	
4	20141221.00000	Navigator Job	PageID	hold	12/21/2014, 4:35 PM	0	
3	20141221.00000	Navigator Job	NVerify	hold	12/21/2014, 4:35 PM	21	
2	20141221.00000	Navigator Job	Export	Job done	12/21/2014, 4:34 PM	1	
1	20141221.00000	Navigator Job	NUpload	pending	12/21/2014, 4:33 PM	0	

3. Log out of the Datacap Navigator.

Procedure 2: Check the sample EDS deployment

- In a browser, go to <http://ecmedu01:9080/DatacapEDSService/types> (The URL is case-sensitive). You can use the DatacapEDSService shortcut in the Internet Explorer browser.
 - Verify that the data is shown in a JSON format, similar to the one shown in the following screen capture.



Procedure 3: Register the EDS plug-in

- In a browser, start the IBM Content Navigator administration desktop. (ICN-Admin)
 - URL: <http://ecmedu01:9080/navigator/?desktop=admin>
 - User name: p8admin
 - Password: IBMFileNetP8
- Create a New plug-in.
 - In the admin desktop, click the Plug-ins icon in the left pane.
 - In the Plug-ins tab, click “New Plug-in”.

- c. In the New Plug-in page, select the “JAR file path” option and enter the location for the plug-in JAR file:

C:\Program Files (x86)\IBM\ECMClient\plugins\edsPlugin.jar



Hint

In Windows Explorer, go to the location of the file. Copy and paste the directory to avoid typing errors.

3. Click Load.

- a. If the file path is valid, the page shows more information as defined for the plug-in.

A plug-in can be either a JAR file or a compiled class file.

Important: The IBM Content Navigator web application server must be able to access the plug-in file on the local file system or through a URL.

JAR file path:

Class file path:

Class name:

Name: External Data Services Support

Version: 2.0.3

- b. Scroll down and enter the value for the “External Data Service URL” field:

http://ecmedu01:9080/DatacapEDSService

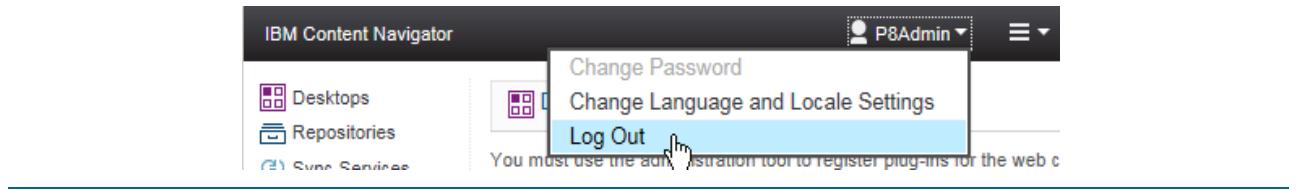
* External Data Service URL:

4. Click “Save and Close”.

5. Verify that the new plug-in is listed in the Plug-ins tab.

	Name	Version
◀	Datacap Navigator	Datacap 9.0_tm900.003.188
▶	External Data Services Support	2.0.3

6. Log out of IBM Content Navigator and close the browser.



End of exercise

Exercise 2: Customize Datacap Navigator Job Monitor

Introduction

The sample EDS application for Datacap Navigator contains customization for the Job Monitor page. You implemented the sample EDS in the previous exercise.

In this lab exercise, you explore the customized Job Monitor.

Procedures:

[Procedure 1, "Check the customization in Job Monitor," on page 4-45](#)

[Procedure 2, "Stop the applications," on page 4-48](#)



Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.



Important

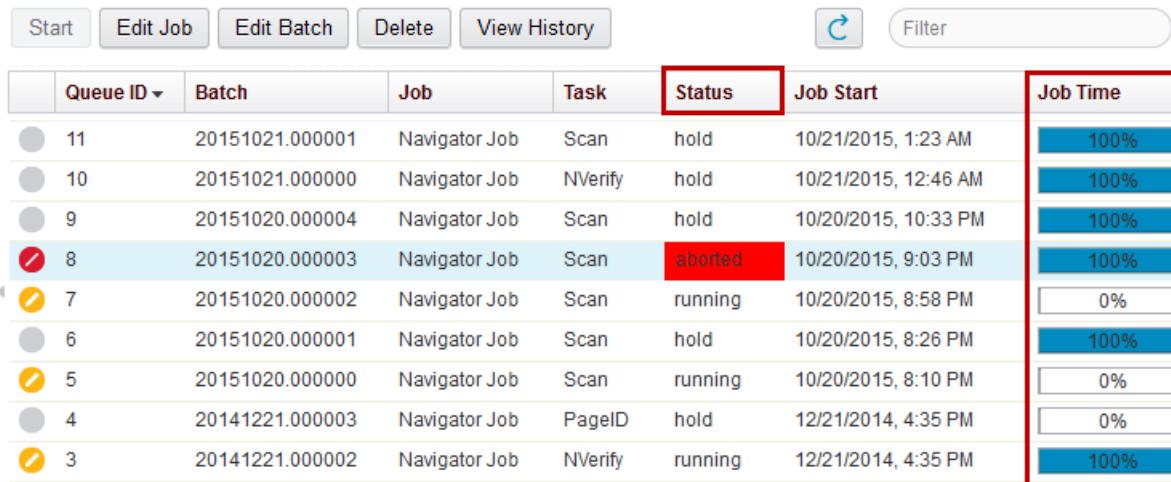
If they are not already started, start the Datacap system components. Use the instructions in the [Do this first, on page 4-1](#) section at the beginning of this unit.

Procedure 1: Check the customization in Job Monitor

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:

User ID: susan
Password: class
 - c. Click Login. The Datacap view opens.
2. In the Job Monitor, if you do not have an item with the value: “aborted” for the “Status” column, do the next step.
3. Edit a Job.
 - a. Select a row.
 - b. Click “Edit Job” from the toolbar.
 - c. In the “Edit Job Properties” page, change the value of the Status field to “aborted”. Select the value from the list.
 - d. Click Apply.

4. In the Job Monitor, check the customized behavior for a cell.
 - a. Click the refresh icon to refresh the monitor view.
 - b. The “Status” column shows the cell with the value: “aborted” in a different style (red color) as shown in the screen capture for the next step.
5. In the Job Monitor, check the customized behavior for a column.
 - a. The “Job Time” column shows the values as progress bars.



	Queue ID ▾	Batch	Job	Task	Status	Job Start	Job Time
11	20151021.000001	Navigator Job	Scan	hold	10/21/2015, 1:23 AM	100%	
10	20151021.000000	Navigator Job	NVerify	hold	10/21/2015, 12:46 AM	100%	
9	20151020.000004	Navigator Job	Scan	hold	10/20/2015, 10:33 PM	100%	
8	20151020.000003	Navigator Job	Scan	aborted	10/20/2015, 9:03 PM	100%	
7	20151020.000002	Navigator Job	Scan	running	10/20/2015, 8:58 PM	0%	
6	20151020.000001	Navigator Job	Scan	hold	10/20/2015, 8:26 PM	100%	
5	20151020.000000	Navigator Job	Scan	running	10/20/2015, 8:10 PM	0%	
4	20141221.000003	Navigator Job	PageID	hold	12/21/2014, 4:35 PM	0%	
3	20141221.000002	Navigator Job	NVerify	running	12/21/2014, 4:35 PM	100%	

6. Log out of the Datacap Navigator.



Information

The code for this part of EDS implementation is in the “C:\DC9-Lab Exercises\EDS\UpdateObjectTypeServlet.Java” file.

End of exercise

Exercise 3: Configure data validation for a field

Introduction

In this lab exercise, you register the EDS plug-in and test it in the IBM Content Navigator.

Procedures:

[Procedure 1, "Check the default behavior in Datacap Navigator," on page 4-47](#)

[Procedure 2, "Stop the applications," on page 4-48](#)

[Procedure 3, "Check the ObjectTypes.json file," on page 4-49](#)

[Procedure 4, "Add Validation for the Total_Cost field," on page 4-50](#)

[Procedure 5, "Start the applications," on page 4-50](#)

[Procedure 6, "Test the EDS feature," on page 4-51](#)

Procedure 1: Check the default behavior in Datacap Navigator

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
 User ID: susan
 Password: class
 - c. Click Login. The Datacap view opens.
2. Scan a batch to check the default behavior.
 - a. In the Job Monitor, click “Navigator Scan” (Blue down arrow icon) from the Shortcut list on the left.
 - b. Click “Browse” next to the “Source” field.
 - c. In the “Choose File to Upload” window, go to C:\Datacap\TravelDocs\images
 - d. Select the car1.tif image.
 - e. Click Open and then click Scan.
 - f. Verify that image ID is listed in the “Batch Structure” on the left pane, and the image is shown in the viewer on the right.
 - g. Click Submit.
3. When the batch is completed, the “Scan” tab is closed, Upload, Page ID and Profiler task runs automatically. All the three steps take a few moments.
 - a. In Job Monitor, if your batch is still at Upload task, click the “Upload” shortcut to complete the upload.

- b. In the Job Monitor page, click Refresh to see the status of your batch. Check that it is in Verify task.
- c. Double-click your batch to open the Verify task.
4. In the Verify tab, scroll down, check the Total_cost field. There is no red-asterisk for this field that indicates that the property is not a mandatory field.
 - a. Erase the value, and tab out of the field to test the mandatory field. No message or warning is shown now.

A screenshot of a Datacap Navigator interface. It shows a table with one row. The first column is labeled 'Total_Cost' and contains the value '\$582.77'. A red arrow points from the text '\$582.77' back to the column header 'Total_Cost'. Below the table, there is a text input field containing '582.77', which is also highlighted with a red border.

5. In the following procedure, you are going to implement EDS, so that this property is configured as a mandatory field.
 - a. Click Hold to Close the Verify task.
 - b. Log out of Datacap Navigator.



Note

In a development environment, you copy the Sample EDS project into an IDE such as Eclipse, and edit the JSON files. Then, create a EAR file and deploy it to the Web Application Server. Since the purpose of this lesson is to demonstrate the EDS features and show the files that need to be edited, the JSON files are directly edited from the deployed folder.

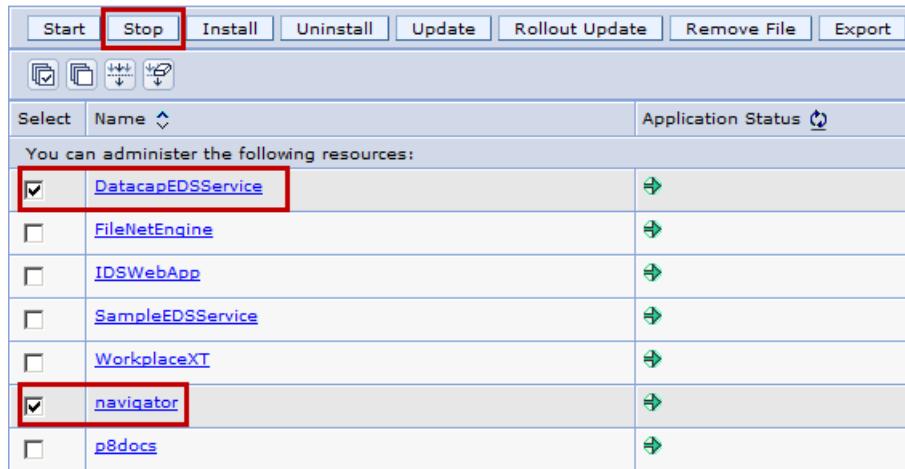
Procedure 2: Stop the applications

Stop the navigator and DatacapEDSService applications in the WebSphere Application Server administration console, to edit the JSON file. When you start the applications again, the file gets reloaded.

1. In your browser, click the WAS admin link in the Bookmarks or go to the following URL:
<https://ecmedu01:9043/ibm/console/logon.jsp>
 - a. Enter the account information and click *Login*.
 - User ID: p8admin
 - Password: IBMFileNetP8
2. In the left pane, expand Applications > Applications Types.
3. Click the “WebSphere enterprise applications” link.



1. Select “DatacapEDSService” and “navigator” in the Enterprise Applications page.



4. Click Stop and wait for the stop message to display.
5. Leave the WebSphere Application Server administration console open.

Procedure 3: Check the ObjectTypes.json file

In this procedure, you check the sample ObjectTypes.json file for the TravelDocs class. This class entry in the EDS service instructs the EDS servlet to respond to any request from IBM Content Navigator for data for the Object class with the symbolic name "TravelDocs".

1. Open the file.
 - a. In Windows Explorer, go to the EDS service deployment directory:
 C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\P8Node01Cell\DatacapEDSService.ear\DatacapEDSService.war\WEB-INF\classes
 - b. Open the ObjectTypes.json file in a text editor (Notepad++).
 - c. If you are prompted for any updates to Notepad++, ignore them for this lab.
2. Verify that the following line exists in the file.

```
{ "symbolicName": "TravelDocs" },
```
3. Close the file.

Procedure 4: Add Validation for the Total_Cost field

You edit the corresponding <Classname>_PropertyData.json file to change the sample EDS plug-in behavior for that class. In this procedure, you edit TravelDocs_PropertyData.json so that the “Total Cost” field status becomes a mandatory field.

1. Open the file.

- In Windows Explorer, go to the EDS service deployment directory:

```
C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\P8Node01Cell\DatacapEDSService.ear\DatacapEDSService.war\WEB-INF\classes
```

- Open the TravelDocs_PropertyData.json file in a text editor (Notepad++).

- If you are prompted for any updates to Notepad++, ignore them for this lab.

2. Edit the file.

- Add the following text at the beginning of the file, after the Square bracket “[“.

```
{
  "symbolicName": "Total_Cost",
  "required": true
},
```

- The file now looks like the one in the following screen capture.

```
1
2 {
3   "symbolicName": "Total_Cost",
4   "required": true
5 },
6 {
7   "symbolicName": "Outbound_From",
```

3. Save and close the file.



Hint

The solution TravelDocs_PropertyData.json file in the C:\DC9-Lab Exercises\EDS folder for your reference. You can also copy and paste the text from this file.

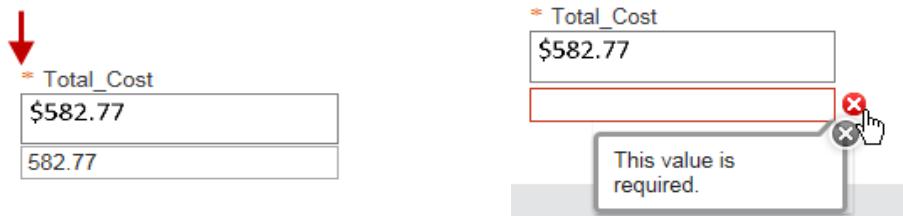
Procedure 5: Start the applications

Restart the navigator and DatacapEDSService applications in the WebSphere Application Server administration console.

- Select navigator and DatacapEDSService in the Enterprise Applications page and click Start. Wait for the Start message to display.
- Logout of the administration console and close the browser.

Procedure 6: Test the EDS feature

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
 User ID: susan
 Password: class
 - c. Click Login. The Datacap view opens.
2. If you do not have any batches that are pending or on hold for the Verify task in the Job Monitor, then scan a new batch.
 - a. Follow Steps 1-3 in [Procedure 1, "Check the default behavior in Datacap Navigator," on page 4-47](#).
3. Otherwise, open the existing batch item (in Verify task step) that you scanned in [Procedure 1, "Check the default behavior in Datacap Navigator," on page 4-47](#).
4. In the Verify tab, scroll down, verify that the Total_Cost field now has a red-asterisk that indicates that the property is a mandatory field.
 - a. Erase the value, and tab out of the field to test the mandatory field. You get a message “This value is required”.



5. Close the task.
 - a. Click Hold.
 - b. Log out of Datacap Navigator and close the browser.

End of exercise

Exercise 4: Create Choice Lists with Sample EDS

Introduction

In this lab exercise, you add an external choice list to the “Pickup_Location” field of a scanned document with EDS.

Procedures:

[Procedure 1, "Stop the applications," on page 4-52](#)

[Procedure 2, "Edit the JSON file to add a choice list," on page 4-52](#)

[Procedure 3, "Start the applications," on page 4-54](#)

[Procedure 4, "Test the choice list," on page 4-54](#)

Procedure 1: Stop the applications

Stop the navigator and DatacapEDSService applications in the WebSphere Application Server administration console.

1. In your browser, click the WAS admin link in the Bookmarks or go to the following URL:
<https://ecmedu01:9043/ibm/console/logon.jsp>
 - a. Enter the account information and click *Login*.
 - User ID: p8admin
 - Password: IBMFileNetP8
2. In the left pane, expand Applications > Applications Types.
3. Click the “WebSphere enterprise applications” link.
4. Select navigator and DatacapEDSService in the Enterprise Applications page and click Stop. Wait for the Stop message to display.
 - a. Refer to the [Procedure 2, "Stop the applications," on page 4-48](#) for more details.
5. Leave the administration console open for a later procedure.

Procedure 2: Edit the JSON file to add a choice list

1. Open the file.
 - a. In Windows Explorer, go to the EDS service deployment directory:
`C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\P8Node01Cell\DatacapEDSService.ear\DatacapEDSService.war\WEB-INF\classes`
 - b. Open the TravelDocs_PropertyData.json file in a text editor (Notepad++).
2. Edit the file.
 - a. Add the following text at the beginning of the file, after the Square bracket “[”.



Hint

Use the following text for your reference. The solution `TravelDocs_PropertyData.json` file is available in the `C:\DC9-Lab Exercises\EDS` folder. You can copy and paste the text from the solution file to avoid any typing errors.

```
{  
    "symbolicName": "Pickup_Location",  
    "initialValue": "NewYork",  
    "choiceList": {  
        "displayName": "Pickup_Location",  
        "choices": [{  
            "displayName": "New York (JFK)",  
            "value": "New York (JFK)"  
        },  
        {  
            "displayName": "Los Angeles (LAX)",  
            "value": "Los Angeles (LAX)"  
        },  
        {  
            "displayName": "Chicago (ORD)",  
            "value": "Chicago (ORD)"  
        },  
        {  
            "displayName": "Orlando (MCO)",  
            "value": "Orlando (MCO)"  
        }]  
    },  
    "hasDependentProperties": false,  
    "required": true  
},
```

3. Save and close the file.

4. The file now looks like the one in the following screen capture.

```

1 [ "symbolicName": "Pickup_Location",
2   "initialValue": "NewYork",
3   "choiceList": [
4     {
5       "displayName": "Pickup_Location",
6       "choices": [
7         {
8           "displayName": "New York (JFK)",
9           "value": "New York (JFK)"
10      },
11      {
12        "displayName": "Los Angeles (LAX)",
13        "value": "Los Angeles (LAX)"
14      },
15      {
16        "displayName": "Chicago (ORD)",
17        "value": "Chicago (ORD)"
18      },
19      {
20        "displayName": "Orlando (MCO)",
21        "value": "Orlando (MCO)"
22      }
23    },
24    "hasDependentProperties": true,
25    "pattern": "[A-Za-z_()]"
26  },
27  {
28    "symbolicName": "Total_Cost",
29    "required": true
30  },
31  {
32    "symbolicName": "Outbound_From",
33

```

Procedure 3: Start the applications

Restart the navigator and DatacapEDSService applications in the WebSphere Application Server administration console.

1. Select navigator and DatacapEDSService in the Enterprise Applications page and click Start. Wait for the Start message to display.
 - a. Refer to the [Procedure 5, "Start the applications,"](#) on page 4-50 for more details.
2. Logout of the administration console and close the browser.

Procedure 4: Test the choice list

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:

`http://ecmedu01:9080/navigator/?desktop=datacap`

- b. Enter the following values:

User ID: susan

Password: class

- c. Click Login. The Datacap view opens.
2. If you do not have any batches that are pending or on hold for the Verify task in the Job Monitor, then scan a new batch.
 - a. Follow Steps 1-3 in [Procedure 1, "Check the default behavior in Datacap Navigator,"](#) on page 4-47.
 3. Otherwise, open the existing batch item (in Verify task step) that you scanned in [Procedure 1, "Check the default behavior in Datacap Navigator,"](#) on page 4-47.
 4. In the Verify tab, scroll down, verify that the Pickup_Location field now has a choice list. You should be able to select a value from a list of values that you entered in the JSON file.
 - a. It also has a red-asterisk that indicates that the property is a mandatory field.

Return_Location	Pickup_Date
New York (JFK)	Mon, Oct 4, 2010
New York (JFK)	Mon, Oct 4, 2010

* Pickup_Location	Return_Date
New York (JFK)	Fri, Oct 8, 2010
New York (JFK)	Fri, Oct 8, 2010

* Total_Cost
\$582.77

5. Close the task.
 - a. Click Hold.
 - b. Log out of Datacap Navigator and close the browser.

End of exercise

Lesson 4.7. Transactional Capture

Overview

Why is this lesson important to you?

As a Datacap system administrator, you install, configure, and customize Datacap Navigator.

You can also configure Transaction Capture to do direct scan from IBM Content Navigator.

Activities

[Exercise 1: Configure Transactional Capture](#), on page 4-57

[Exercise 2: Configure the Datacap application profile](#), on page 4-62

[Exercise 3: Test the Transactional Capture configuration](#), on page 4-65

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
P8 Administrator	p8admin	IBMFileNetP8
Datacap	susan	class



Note

Passwords are always case-sensitive.

Exercise 1: Configure Transactional Capture

Introduction

In this lab, you configure the IBM Content Navigator to scan the documents directly into the repository.

Procedures:

[Procedure 1, "Check the default settings to add a document," on page 4-57](#)

[Procedure 2, "Configure the menu," on page 4-58](#)

[Procedure 3, "Assign the new menu to your custom desktop," on page 4-60](#)

[Procedure 4, "Add the "Add to Batch" menu option," on page 4-61](#)



Windows

For this lesson, you do all the steps on the Server 2008 ECMEDU01 student system.



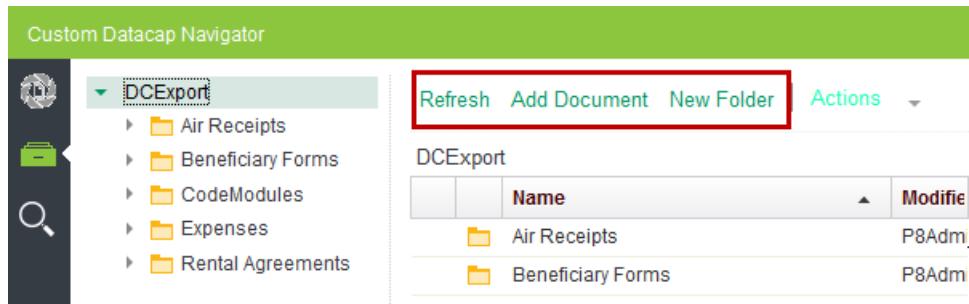
Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first, on page 4-1](#) section at the beginning of this unit.

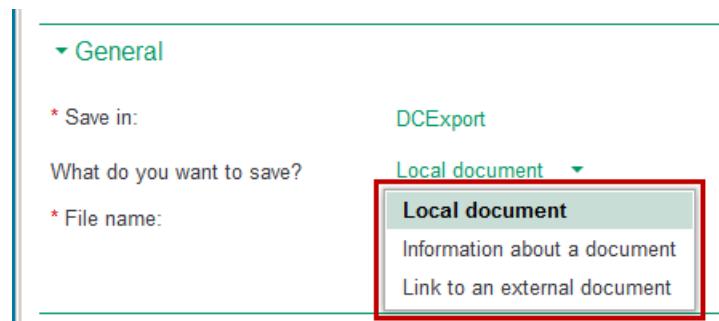
Procedure 1: Check the default settings to add a document

In this procedure, you check the default settings for adding documents in IBM Content Navigator.

1. In the Internet Explorer browser, open Datacap Navigator desktop.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
User Name: susan
Password: class
 - c. Click Login. The Datacap view opens.
2. Check the default menu items in the toolbar for the Browse View.
 - a. In the leftmost pane, click the “Open Browser View” icon.
 - b. Verify that you are able to expand the “DCExport” repository and see the available folders.
 - c. Observe the menu items available in the toolbar.



- d. You are going to add a menu item to the toolbar for scanning documents.
- 3. Check the default settings in the Add Document wizard.
 - a. Click "Add Document" in the toolbar.
 - b. Observe the three options in the list for the "What do you want to save?" field.



- c. After you configure the menu, "Document from scanner" option is added.
- d. Click Cancel to go back to the main page.
- 4. Log out of the Datacap Navigator. Click the user icon in the banner. Select "Log Out" from the list.

Procedure 2: Configure the menu

In this procedure, you configure a menu item for scanning in IBM Content Navigator.

1. 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 left pane, select "Menus".

3. Make a copy of an existing menu.

- In the “Menus” tab on the right pane, enter “Content List” in the search field.
- From the search results list, select “Default content list toolbar”.
- Select Copy.

If you want to create a new type of menu, you must define the menu in a plug-in.

Name	ID	Type	Description
Default content list toolbar	DefaultContentListToolbar	Content list toolbar	Displayed above the list of documents and folders in search results and when browsing for content on the repository.

4. Configure the new menu.

- In the “New Menu” tab on the right pane, enter a name (Example: ScanMenu).
- Scroll down and select “Scan Document” from the “Available” column and move to “Selected” Column. Use the forward arrow.

Available:

- Check In
- Check Integrity
- Check Out
- Classify
- Delete
- Edit Batch
- Edit Job
- Hold
- Monitor

Selected:

- New Menu
 - Refresh
 - Add Document
 - New Folder
 - Scan Document**

5. Replace the “Add Document” menu item.

- There are 2 “Add Document” menu items with different IDs.

Menu item label: Add Document
ID: Import
Repository types: Content Manager, FileNet Content Manager, Content Management Interoperability Services (CMIS)
Applies when multiple items are selected: True
Applies when no items are selected: True
Required privileges: addDoc

Menu item label: Add Document
ID: TranCapAddDocumentPluginActionForICN
Repository types: Content Manager, FileNet Content Manager, Content Management Interoperability Services (CMIS)
Applies when multiple items are selected: True
Applies when no items are selected: True
Required privileges: addDoc
Plug-in: DatacapWebPlugin



Hint

- The “Add Document” item with “ID: Import” is on the “Selected” pane.
- The “Add Document” item with “ID: TranCapAddDocumentPluginActionForICN” is on the “Available” pane.

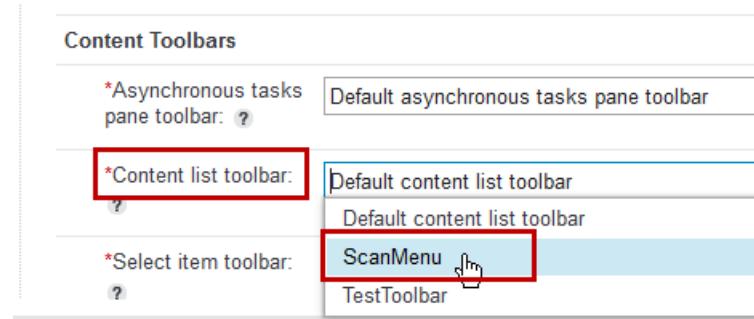
Hover over each item to see the details for that menu item.

- b. Move the “Add Document” item (ID: Import) from the “Selected” pane to “Available pane” to remove it from the menu. Use the backward arrow.
 - c. Move the “Add Document” item (ID: TranCapAddDocumentPluginActionForICN) from the “Available” pane to “Selected” pane to include it in the menu. Use the forward arrow.
 - d. Click “Save and Close”.
 - e. In the Menus tab, search for the menu item that you added (ScanMenu) and verify that the menu is added.
6. Leave the Content Navigator admin desktop open for the next procedure.

Procedure 3: Assign the new menu to your custom desktop

In this procedure, you replace the existing default Content list toolbar menu for this desktop with the new one.

1. In the Desktops tab, select the “Datacap” desktop.
 - a. Click Edit.
 - b. Click the Menus tab.
2. Select the new menu.
 - a. Scroll down and select the ScanMenu for the “Content Toolbar” > “Content list toolbar” field.



- b. Click "Save and Close".

Procedure 4: Add the “Add to Batch” menu option

In this procedure, you configure the “Add to Batch” option.

1. Create a custom document context menu.
 - a. Click “Menus” from the left navigation pane.
 - b. Type “document context menu” in the search window.
 - c. Select the “Default document context menu” and click Copy.
 - d. Type “Custom document context menu” for the name.
 - e. In the available left column, select the “Add to Batch” option and click the right arrow to add it to the selected menu options.
 - f. Position the “Add to Batch” option immediately after the “Check In” option.
 - g. Click “Save and Close”.
2. Activate the custom menu on the Datacap Desktop.
 - a. Click “Desktops” from the navigation pane.
 - b. Click the “Datacap” desktop and click Edit.
 - c. Click the Menus tab.
 - d. Scroll down to the “Context Menus” section.
 - e. For the “Document context menu” select the “Custom document context menu”
 - f. Click “Save and Close”.
 - g. Logout of IBM Content Navigator and close the Internet Explorer browser.

End of exercise

Exercise 2: Configure the Datacap application profile

Introduction

In the previous lab, you customized the IBM Datacap Navigator desktop for Transaction Capture and Direct Scan.

In this lab, you configure a profile for identifying pages and extracting metadata from images. You also create a document class to receive the metadata extracted from the document so that IBM Datacap Navigator can scan directly write documents into the repository.

Procedures:

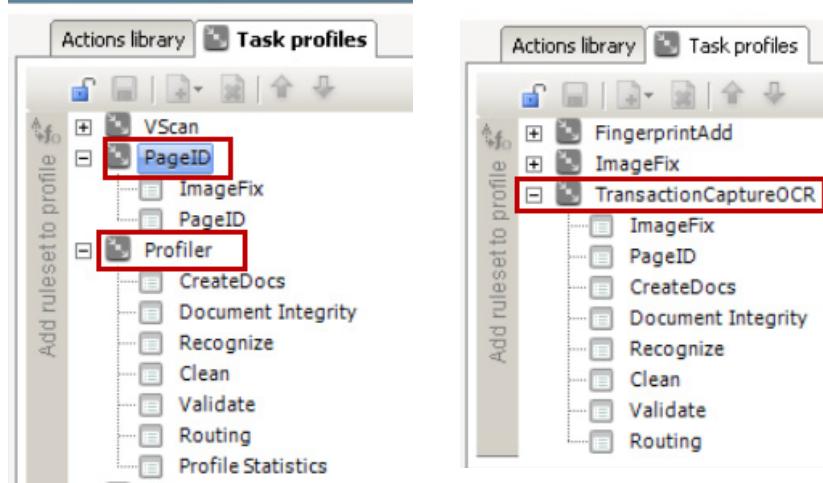
[Procedure 1, "Verify the TransactionCaptureOCR profile," on page 4-62](#)

[Procedure 2, "Create Document Class for a TravelDocs Document," on page 4-63](#)

Procedure 1: Verify the TransactionCaptureOCR profile

In this procedure, you check to see that you have correctly configured profile.

1. Open Datacap Studio.
 - a. Double-click Datacap Studio icon on the desktop.
 - b. Select the TravelDocs application and click Next.
 - c. Log in using susan/class/1 and click Finish.
2. Check the TransactionCaptureOCR profile.
 - a. In Datacap Studio, select the “Task profiles” tab in the rightmost pane.
 - b. In the “Task profiles” tab, expand the TransactionCaptureOCR profile and verify that it has the following rulesets selected in this order:
 - ImageFix
 - PageID
 - CreateDocs
 - Document Integrity
 - Recognize
 - Clean
 - Validate
 - Routing
 - c. In the “Task profiles” tab, expand the PageID and Profiler nodes.
 - d. Verify that all tasks listed in the PageID and Profiler profiles except the Profile Statistics task are included in the TransactionCaptureOCR profile as shown in the following screen captures.



Procedure 2: Create Document Class for a TravelDocs Document

This procedure is done using the administration Console for Content Platform Manager. The information in table below is used in step 1 and step 3.

Use the table and the instructions below to create the document class

Flight Field table.

Field Names	Data Type
Vendor_Logo	String
Outbound_Date	Datetime
Outbound_From	String
Outbound_To	String
Return_Date	Datetime
Return_From	String
Return_To	String
Airfare	Float
Taxes	Float
Total_Cost	Float

1. Check your Air_Ticket field names.
 - a. In your Datacap Studio, which is still open, expand the Document hierarchy.
 - b. Expand TravelDocs > Flight > Air_Ticket.
 - c. Check the field names against the Air_Ticket Field table.
 - d. Click Exit to close Datacap Studio.

2. Log in to the administration Console for Content Platform Manager.
 - a. Open the Internet Explorer browser and click the ACCE bookmark on the bookmarks toolbar.
 - b. Log in using p8admin/IBMFileNetP8.
3. Define properties for the Flight Document Class.
 - a. Expand the Object Store node in the navigation pane.
 - b. Click the DCExport object store in the navigation pane.
 - c. Expand the Data Design node and click Property Templates.
 - d. Click New in the Property Templates tab in the right side pane.
 - e. Type the first field name from the Air_Field table and click Next.
 - f. Select the Data type from the Air_Field table for the property you are defining and click Next.
 - g. Click Next for the “Select Choice List or Marketing Set” option.
 - h. Click Next for the “Single or Multi-Value” option.
 - i. Click Finish and wait for the process to complete and click Close.
 - j. Repeat step 3.c to 3.h for each field in the Air_Ticket Field table.
4. Define the Document Class for the Flight Page.
 - a. Expand Classes under Data Design in the navigation pane.
 - b. Right-click Document and select New Class.
 - c. Type **Flight** for the document class name. **Doc class name must match DC DCO hierarchy document exactly.**
 - d. Click Next and then click Finish.
 - e. Click Open to open the Flight class.
 - f. Click the Property Definitions tab.
 - g. Click Add.
 - h. Scroll through the property list and click the checkbox for each of the properties that you are listed in the Air_Ticket Field table and click OK.
 - i. Click Save and verify that:
 - There are 10 properties on the Property Definition page.
 - All the entries display DocVersion in the Table Name field.
 - All the entries display a value resembling the Property name in the Column name field.
 - j. Click Close, log out of the administration Console for Content Platform Engine, and close the browser window.

End of exercise

Exercise 3: Test the Transactional Capture configuration

Introduction

In the previous labs, you customized the IBM Datacap Navigator desktop, the Datacap application, and a document Class for Transactional Capture and Direct Scan.

In this lab, you test the Transactional Capture capabilities:

- Verify the Datacap Navigator configuration that you implemented in the earlier lab.
- Test the Read from scanner.
- Automatic extraction of metadata from images.
- Verify that documents are written directly to the repository with the metadata extracted from the Air_Ticket page.

Procedures:

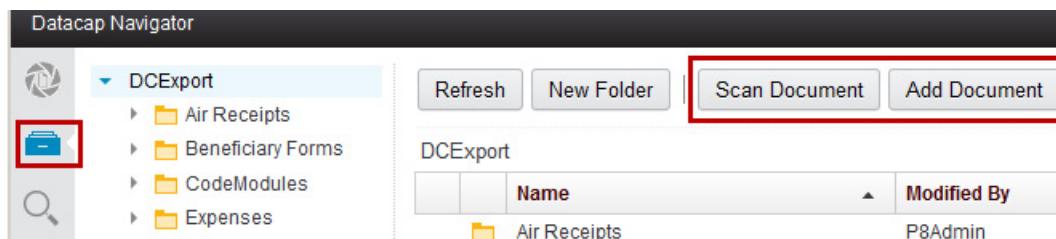
[Procedure 1, "Verify the custom menu," on page 4-65](#)

[Procedure 2, "Test the “Scan Document” menu item," on page 4-66](#)

[Procedure 3, "Test the “Add Document” menu item," on page 4-68](#)

Procedure 1: Verify the custom menu

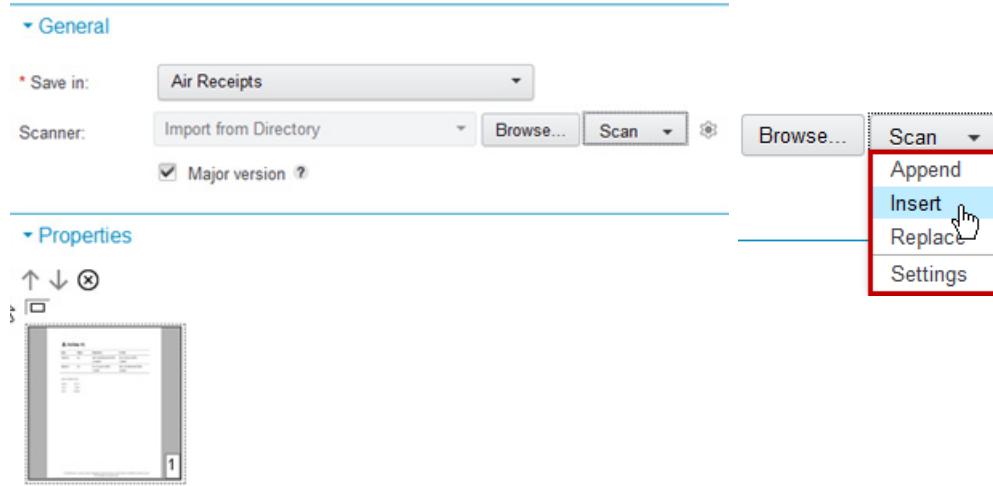
1. In the Internet Explorer browser, open your customized Datacap Navigator desktop.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
 User ID: susan
 Password: class
 - c. Click Login. The Datacap view opens.
2. Check the menu item that you added in the toolbar for the Browse View.
 - a. In the leftmost pane, click the “Open browser view” cabinet icon.
 - b. Expand the “DCExport” repository and the available folders.
 - c. Verify that the toolbar now has an additional menu item “Scan Document” that you configured.
 - d. The “Add Document” menu item is replaced with the Datacap plug-in menu item.



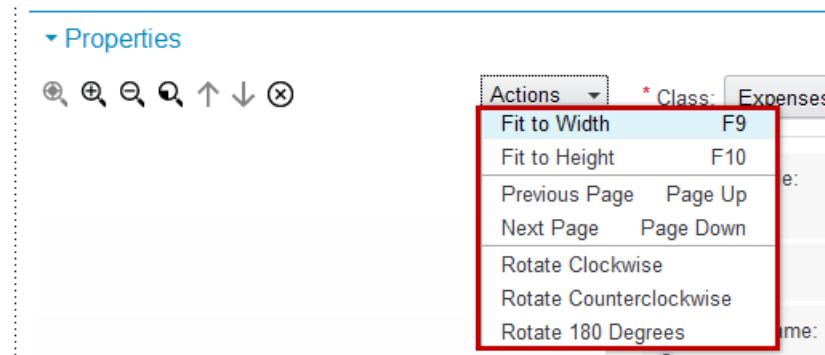
- e. Leave the Datacap Navigator desktop open.

Procedure 2: Test the “Scan Document” menu item

1. Click the DCExports node in the navigation pane.
2. Click Scan Document.
 - a. Notice that the user interface contains a section similar to Scan in Datacap Navigator.
3. For the “Save in” field, click the down arrow next to the DCExport, and select the “Air Receipts” folder.
 - a. Click OK. The “Save in” field now shows “Air Receipts”.
4. For the “Scanner” section, click Browse.
 - a. Select an image (Flight1.tif) from the C:\Datacap\TravelDocs\images folder and click Open.
5. Click “Scan” and select the “Insert” option.
 - a. You can also choose “Replace” or “Append”.
 - b. The “Settings” option (gear icon next to Scan) shows the Scanner settings.
 - c. The thumbnail of the image is shown in the “Properties” section.



- d. Double-click the image to expand it. Check a list of actions available for the image.



6. On the right side of the Properties pane, For the “Class” field, click the down arrow and select “Flight”.
 - a. Click OK. The “Class” field now shows “Flight”.
 - b. Notice that the properties fields that you defined in the Flight Document Class are displayed, but the values are not extracted and in the property fields.

Property	Value
* Class:	Flight
Document Title:	tm000001.tif
Vendor_Logo:	
Return_To:	
Airfare:	
Outbound_To:	
Taxes:	
Outbound_From:	
Outbound_Date:	M/d/yyyy, h:mm a <input type="button" value="Calendar"/>
Return_Date:	M/d/yyyy, h:mm a <input type="button" value="Calendar"/>
Total_Cost:	
Return_From:	

7. Capture the page properties.
 - a. Click Capture and select Capture Current Page.
 - b. If you are prompted to log in use susan/class.

Notice that the properties are populated from the Flight fields.

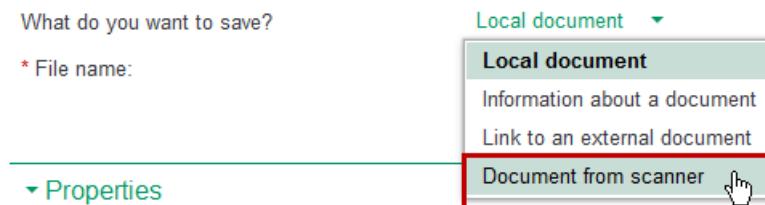
 - c. Change the Document Title to MyScannedDoc.tif.
8. Scroll down to the Security section.
 - a. Optionally, add more users.
9. Click Add in the right-most pane to complete the wizard.
10. Verify that the scanned document is added to the FileNet Content Manager repository folder.
 - a. In the Browse view, under the DCExport repository, click the Air Receipt folder where you added the document.
 - b. Check that a document with the name you entered (MyScannedDoc.tif) is listed.

11. Verify the scanned document properties.
- Single-click the document to view its properties.
 - Check that in the Properties pane on the right pane, a list of properties with the values extracted from the Air_Ticket page.

Properties	
Class:	Flight
Document Title:	MyScannedDoc.tif
Vendor_Logo:	Airline #1
Outbound_From:	New York/Newark (EWR)
Outbound_To:	San Francisco (SFO)
Outbound_Date:	12/31/1969, 7:00 PM
Return_From:	San Francisco (SFO)
Return_To:	New York/Newark (EWR)
Return_Date:	12/31/1969, 7:00 PM
Airfare:	760.27
Total_Cost:	824.83

Procedure 3: Test the “Add Document” menu item

- In the Browse view, click the “Add Document” menu in the toolbar.
- The “Air Receipts” is still selected for the “Save in” field.
- For the “What do you want to save” section, click the down arrow next to “Local Document”.
- Verify that the “Document from scanner” option is listed. This option is available from the “Add Document” menu item that you configured. Select the option.



- Scanner section is shown.



Note

The following steps are similar to the previous procedure: [Test the “Scan Document” menu item](#), on page 4-66.

5. For the “Scanner” section, click Browse.
 - a. Select an image (Flight1.tif) from the C:\Datacap\TravelDocs\images folder.
 - b. Click Open.
6. Click “Scan” and select the “Insert” option.
 - a. The image is shown in the “Properties” section.
7. For the “Class” field, click the down arrow and select “Flight”.
 - a. Click OK.
 - b. The “Class” field now shows “Flight”.
8. In the “Class” section, enter values for the fields.
9. Capture the page properties.
 - a. Click Capture and select Capture Current Page.

Notice that the properties are populated from the Air_Ticket page fields.

 - b. Change the Document Title to MyDocFromScanner.tif.

▼ Properties		Edit
Class:	Flight	
Document Title:	MyDocFromScanner.tif	
Vendor_Logo:	Airline #1	
Outbound_From:	New York/Newark (EWR)	
Outbound_To:	San Francisco (SFO)	
Outbound_Date:	12/31/1969, 7:00 PM	
Return_From:	San Francisco (SFO)	
Return_To:	New York/Newark (EWR)	
Return_Date:	12/31/1969, 7:00 PM	
Airfare:	760.27	
Total_Cost:	824.83	

10. Scroll down to the Security section.
 - a. Optionally, add more users.
11. Click “Add” at the lower end in the right-most pane to complete the wizard.

12. Verify that the scanned document is added to the FileNet Content Manager repository folder.
 - a. In the Browse view, under the DCExport repository, click the Air receipts folder where you added the document.
 - b. Check that a document with the name you entered (MyDocFromScanner.tif) is listed.
13. Verify the scanned document properties.
 - a. Single-click the document to view its properties.
 - b. Check that in the Properties pane on the right pane, a list of properties with the values you entered are shown.

Procedure 4: Test the “Add to Batch”

1. Select a file add to a batch.
 - a. Click the Air_Receipts Repository folder.
 - b. Right-click the MyScannedDoc.tif file document that you just created.
 - c. Select “Add to Batch”.
 - d. Click Close on the Successful message screen.
 2. Check that the batch is created in the C:\Datacap\TraveDocs\batches folder.
 3. Logout of the Datacap Navigator and close the browser.
-

End of exercise

Lesson 4.8. Install and Customize Datacap Navigator

Overview

Why is this lesson important to you?

As a Datacap system administrator, you install, configure, and customize Datacap Navigator.

To do these tasks effectively, you must be familiar with the options available to customize the Datacap Navigator interface.

Activities

- [Exercise 1: Install Datacap Navigator as a plug-in](#), on page 4-72
- [Exercise 2: Customize the Datacap Navigator desktops](#), on page 4-78

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
P8 Administrator	p8admin	IBMFileNetP8
Datacap	susan	class



Note

Passwords are always case-sensitive.

Exercise 1: Install Datacap Navigator as a plug-in

Introduction

In this activity, you install Datacap Navigator as a plug-in to IBM Content Navigator. The plug-in is already installed on the student system to do the lab exercises for the previous lessons. You must delete the existing plug-in before the installation.

The installation of plug-in creates Datacap Navigator desktops for business users and administrators. It also creates a default Datacap repository.

Procedures:

[Procedure 1, "Start Content Navigator administration Desktop,"](#) on page 4-72

[Procedure 2, "Delete the existing Datacap Navigator plug-in,"](#) on page 4-73

[Procedure 3, "Install the Datacap plug-in,"](#) on page 4-74

[Procedure 4, "Open the Datacap Navigator desktops,"](#) on page 4-76



Windows

You complete all the procedures for this lesson on the Server 2008 ECMEDU01 student system.



Important

If they are not already started, start the Datacap system components. Use the instructions in the [Do this first,](#) on page 4-1 section at the beginning of this unit.

Procedure 1: Start Content Navigator administration Desktop

1. In the Internet Explorer browser, click the “ICN Admin” shortcut or enter the following URL:

`http://ecmedu01:9080/navigator/?desktop=admin`

- a. Enter the following values:

User ID: p8admin

Password: IBMFileNetP8

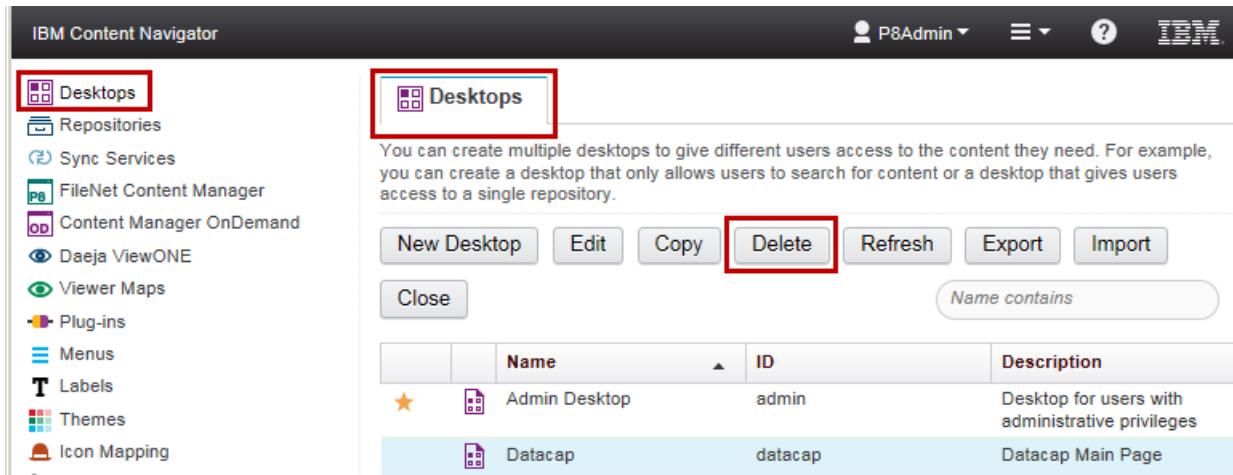
2. Click Login.

The administration view opens.

Procedure 2: Delete the existing Datacap Navigator plug-in

You must delete the Datacap Navigator desktops that are referenced in the plug-in first. Then, delete the plug-in.

1. Delete the Datacap Navigator desktops.
 - a. Select “Desktops” from the left pane.
 - b. In the “Desktops” tab on the right pane, select “Datacap”.
 - c. Click “Delete” from the toolbar.



- d. When you are prompted to confirm the delete, click Delete in the message box.
 - a. In the “Desktops” tab, verify that the “Datacap” desktop is removed from the list.
2. Repeat Step 1 to delete the following Datacap Navigator desktops.
 - Datacap Admin Desktop.
 - Datacap Advance Desktop.
 - Datacap QuickLaunch Desktop.
 - a. In the “Desktops” tab, verify that the desktops are removed from the list.
3. Delete the Datacap Navigator repository.
 - a. Select “Repositories” from the left pane.
 - b. In the “Repositories” tab on the right pane, select “TravelDocs”.
 - c. Click Delete.
 - d. When you are prompted to confirm the delete, click Delete in the message box.
 - e. In the “Repositories” tab, verify that “TravelDocs” is removed from the list.
4. Repeat Step 3 to delete the “ExpenseDemo” repository.
5. Delete the “Datacap Navigator” plug-in.
 - a. Select “Plug-ins” from the left pane.
 - b. In the “Plug-ins” tab on the right pane, select “Datacap Navigator”.

- c. Click Delete.
 - d. When you are prompted confirm the delete, click Delete in the message box.
 - e. In the “Plug-ins” tab, verify that the plug-in is removed from the list.
6. Log out of the IBM Content Navigator administration Desktop and close the browser.
7. Restart WebSphere Application Server.
- a. Open the “WebSphere Admin” folder on the Windows Desktop.
 - b. Double-click the `Stop the Server1.bat` file.
 - c. Wait for the Stop the server Command Window to close.
 - d. In the same folder, double-click the `Start Server1.bat` file.
 - e. Wait for the Start the server Command Window to close.
8. Restart Datacap Services.
- a. Double-click the “Datacap Server Manager” shortcut on the Windows Desktop.
 - b. In the “Datacap Server Manager” window, select the “Service” tab.

For the “Service name” field, the “Datacap Taskmaster Server” is selected.



Hint

If the Status shows that the server is not running, click the green arrow to start the server.

- c. Click the red icon to stop the server. Wait for the server to stop.
 - d. Click the green arrow to start the server. Wait for the server to start.
 - e. Click Close to close the Datacap Server Manager window.
9. Restart the Datacap Rulerunner Service.
- a. Double-click the “Datacap Rulerunner Manager” shortcut on the Windows Desktop.
 - b. In the “Datacap Rulerunner Manager” window, select the “Rulerunner” tab.
 - c. Click “Start”. Wait for the server to start.
 - d. Click Close to close the window.

Procedure 3: Install the Datacap plug-in

1. 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
 - c. For more details, see [Procedure 1, "Start Content Navigator administration Desktop,"](#) on page 4-72.

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`

Review and confirm the values that you just entered using the following table:

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

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.

	Name	ID	Description
★	Admin Desktop	admin	Desktop for users with administrative privileges
	Datacap	datacap	Datacap Main Page
	Datacap Admin Console	dcadmin	
	Datacap Advance Desktop	dcAll	Contains Datacap Main Feature, Quick Launch Pane and Shortcut Pane
	Datacap QuickLaunch Desktop	dcQuickLaunch	Contains Datacap Main Feature, only enable quick launch pane by default
	Sample Desktop	SampleDesktop	

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

Procedure 4: Open the Datacap Navigator desktops

1. In the Internet Explorer browser, open the Datacap Navigator for business users.
 - a. Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - b. Enter the following values:
 User name: susan
 Password: class
 - c. Click Login.
 - d. Verify that the Datacap view opens.
2. Verify the main sections in this view.
 - Shortcut pane - A list of all of shortcuts for different tasks:
 Navigator Scan, Verify, FixUp, and Upload
 - Job Monitor view - A list of batches
3. Log out of Datacap Navigator.
4. Switch to the Datacap Navigator for administrators desktop.
 - a. In the Internet Explorer browser, click the “DCN-dcAdmin” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=dcadmin`
 - b. Enter the following values:
 User name: susan
 Password: class
 - c. Click Login.
 - d. Verify that administration view opens.

5. Explore the features that are available in this view.
 - Workflows
 - Groups
 - Users
 - Stations
 - Shortcuts
 - Panels
 6. Log out the Datacap Navigator and close the browser.
-

End of exercise

Exercise 2: Customize the Datacap Navigator desktops

Introduction

In the previous lab, you installed the Datacap Navigator as a plug-in to IBM Content Navigator and created default Datacap Navigator desktops for business users and administrators.

In this lab, you configure Datacap repositories for the applications. You also customize the desktops to include the repositories and features.

Procedures:

[Procedure 1, "Configure Datacap repositories," on page 4-78](#)

[Procedure 2, "Add repositories to Datacap Navigator desktop," on page 4-79](#)

[Procedure 3, "Add features to Datacap Navigator desktop," on page 4-80](#)

[Procedure 4, "Optional: Change the name and theme for the desktop," on page 4-81](#)

[Procedure 5, "Test your customized Datacap Navigator desktop," on page 4-81](#)

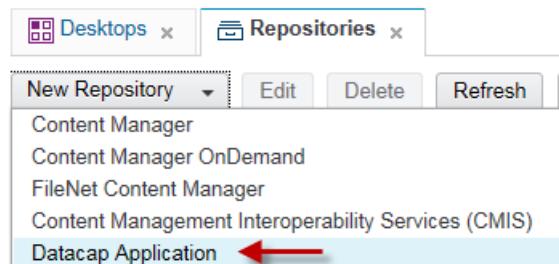
[Procedure 6, "Configure the Datacap Navigator for scanning," on page 4-83](#)

Procedure 1: Configure Datacap repositories

In this procedure, you configure Datacap repositories for the applications and the repositories becomes available in IBM Content Navigator.

1. 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
 - c. For more details, see [Procedure 1, "Start Content Navigator administration Desktop," on page 4-72](#).
2. In the administration view, select “Repositories” from the left pane.
3. In the “Repositories” tab on the right pane, click “New Repository”.
 - a. Select “Datacap Application” from the list.



4. In the “New Repository” tab, enter the values for the fields with the data from the following table.
 - a. The `ID` field is populated automatically based on the Display name value.

Field	Value
Display name	ExpenseDemo
Datacap wTM URI	http://ecmedu01:85/ServicewTM.svc
Application	ExpenseDemo
Default Station	1

5. Enable the “Configuration Parameters” tab.
 - a. Notice that the “Configuration Parameters” tab is not yet enabled. Click “Connect” at the end of the page.
 - b. Enter the following values for the repository when you are prompted to log in.

User name: susan
Password: class
 - c. Click “Log In”.
 - d. Check that you are able to select the “Configuration Parameters” tab.



Note

In the “Configuration Parameters” tab, you can customize the Job Attributes. The values in the “Selected Columns” pane are shown for the list of jobs of this repository in the Job Monitor.

6. Add or remove Job Attributes.
 - a. In the “Configuration Parameters” tab, move a column name (Example: “Batch Directory”) from the “Available Columns” to “Selected Columns” to add the item.
 - b. Move “Operator” from the “Selected Columns” to “Available Columns” to remove the item.
7. Change the order of the columns.
 - a. Select an item from the “Selected Columns”.
 - b. Use the up and down arrows to change the order of the columns.
8. Click “Save and Close”.
9. Verify that the repository that you created is listed in the “Repositories” tab.
 - c. Leave the administration desktop open for the next procedure.

Procedure 2: Add repositories to Datacap Navigator desktop

1. In the administration desktop, Select “Desktops” tab in the right pane.
 - a. In the “Desktops” tab, select the “Datacap” desktop.
 - b. Click Edit.
- The “Datacap” tab opens.

2. In the “Datacap” tab > “General” subtab, notice that “TravelDocs” repository that you configured when you installed the plug-in is used for authentication.
3. Add more repositories to this desktop:
 - a. In the “Datacap” tab, select the “Repositories” subtab.
 - b. From the “Available Repositories” pane, select “ExpenseDemo” and move to the “Selected Repositories” pane by clicking the arrow.
 - c. Repeat Step 3b, to move the following repositories: DCExport.
You can multi-select repositories with Shift and click.
4. Click “Save”.
5. Leave the “Datacap” tab open for the next procedure.

Procedure 3: Add features to Datacap Navigator desktop

1. In the “Datacap” tab, select the “Layout” subtab.
2. Under the “Displayed features” section, select the “Browse” feature.
 - a. On the rightmost pane, select “DCExport” (FileNet Content Manager repository) for the “Default repository” field.
 - b. For the “Repositories” field, clear all repositories except “DCExport”.



Information

If you select “Datacap” type repositories for Browse or search, it produces an error because Datacap repositories are not designed for Content Management. “DCExport” is a FileNet Content Manager type repository that is configured for document Browse and Search)

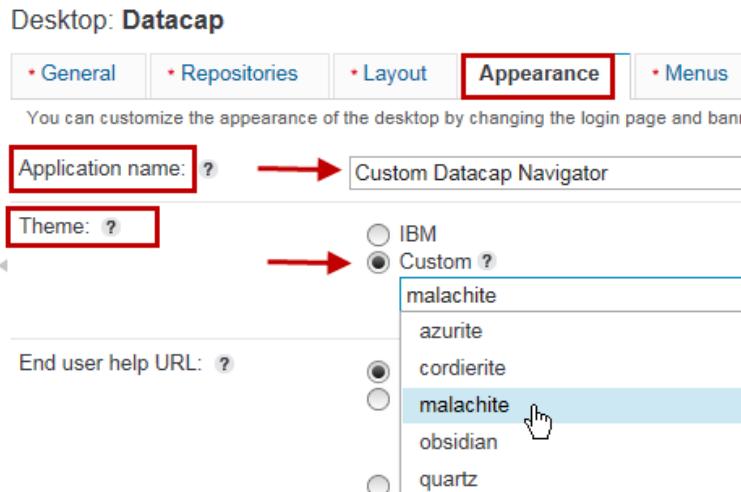
Feature configuration	
* Default repository: ?	<input checked="" type="text"/> DCExport
Repositories: ?	<input type="checkbox"/> TravelDocs <input type="checkbox"/> ExpenseDemo <input type="checkbox"/> Medical Claims <input checked="" type="checkbox"/> DCExport

- c. Scroll down. In the “Additional Desktop Components” section, observe that you can configure thumbnails, Global toolbar, and Status bar to show in your desktop.
- d. Scroll up and click the “Search” check box, then repeat Step 2 for the Search feature.
3. Click “Save”.

- Leave the “Datacap” tab open for the next procedure.

Procedure 4: Optional: Change the name and theme for the desktop

- In the “Datacap” tab, select the “Appearance” subtab.
- For the “Application name” field, edit the default name (Example: Custom Datacap Navigator).
- For the “Theme” field, select the “Custom” option.
 - Select a custom theme from the list (Example: malachite).



- Click “Save and Close”.
- Log out of the Content Navigator client and close the browser.

Procedure 5: Test your customized Datacap Navigator desktop

- In the Internet Explorer browser, open your customized Datacap Navigator desktop.
 - Click the “DCN-Datacap” shortcut or enter the following URL:
`http://ecmedu01:9080/navigator/?desktop=datacap`
 - Enter the following values:
User name: susan
Password: class
 - Click Login. The Datacap view opens.
- Verify the banner theme and application name for your customized desktop:
 - Banner color: green
 - Application name on the banner: Custom Datacap Navigator
- Verify the repositories that you added:
 - A list of Datacap repositories are shown in the banner with the default repository “TravelDocs” selected.

Queue ID	Batch	Job	Task	Status
2	20141221.000001	Navigator Job	Export	Job done
12	20151102.000000	Navigator Job	NVerify	pending
10	20151021.000000	Navigator Job	NVerify	running
3	20141221.000002	Navigator Job	NVerify	hold

4. Verify the Browse feature that you configured:

- In the leftmost pane, click the “Open browser view” cabinet icon to access the Browse View.
- Verify that you are able to expand the “DCExport” repository and see the available folders.
- Select the “Expenses” folder.
- Verify that you are able to view the documents on the right pane (Example: Document Name - <date>.<Seq#>-CarRental-MILLARD BRYAN).



Hint

The number of documents that you have on your image might be different based on how many batches that you ran in all other labs.

	Name	Size	Modified
	20150519.000003-CarRental-MILLARD BRYAN	27 KB	P8Admin
	20150519.000003-CarRental-MILLARD BRYAN	27 KB	P8Admin

5. Optionally, select the “magnifying glass” icon to check the Search View that you configured.
- Leave the desktop opened for the next procedure.

Procedure 6: Configure the Datacap Navigator for scanning

This step is a one time configuration that you must do when you use the Datacap Navigator for the first time for scanning the images.

1. In your customized desktop, click the Datacap View icon (first icon) on the far left pane.

- a. If you are prompted to log in, enter the following login credentials.

User ID: susan

Password: class

- b. Datacap view is opened.

2. Click the “Navigator Scan” shortcut.

- a. Verify that the “Browse” button (next to the “Source” field) is visible.

3. Log out of the Datacap Navigator desktop and close the browser.

- a. Skip the rest of the steps in this procedure.

You completed this lesson.



Hint

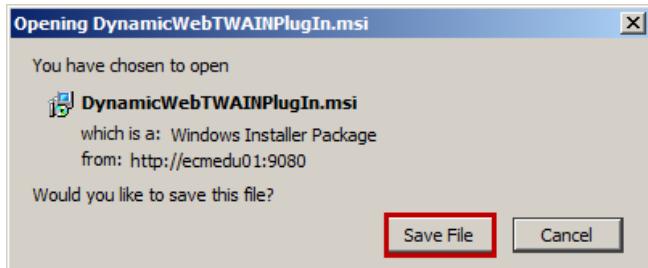
Because your system was already configured for the Scan, you might not be prompted to configure again.

- b. If you are prompted with the information window as shown in the following screen capture, continue with the steps in this procedure:

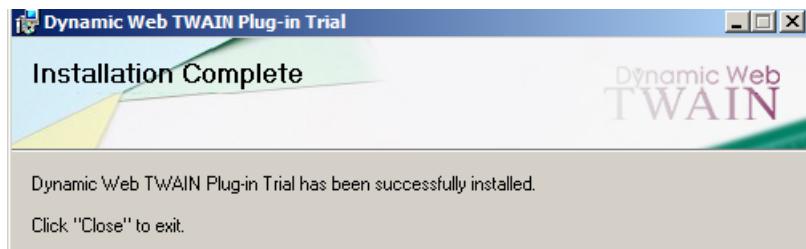
Information

To scan, download and run the [DynamicWebTWAINHTML5Edition.exe](#) program.
You need to do this only one time.

4. Click the “DynamicWebTWAINHTML5Edition.exe” link to download the file from the browser.
- a. Click “Save File” when you are prompted.



5. The file is saved in the “C:\Users\Administrator\Downloads” folder.
 - a. Double-click the DynamicWebTWAINPluginDown.msi file to run the application.
 - b. In the “Dynamic Web TWAIN Plug-in” window that opens, follow the wizard to complete the steps.
 - c. Click Next twice and then Close.



6. Verify that the “Browse” button (next to the “Source” field) is visible in the Scan tab.
7. Log out of the Datacap Navigator desktop and close the browser.

End of exercise

Unit 5. Administration of Production System

Estimated time

05:00

Unit overview

This unit contains these lessons.

Lessons

[Lesson 5.1, "Create Shortcuts for Web Clients,"](#) on page 5-7

[Lesson 5.2, "Virtual Stations and Queuing of Tasks,"](#) on page 5-16

[Lesson 5.3, "Disaster Recovery,"](#) on page 5-26

[Lesson 5.4, "Configure DB2 Server,"](#) on page 5-28

[Lesson 5.5, "Application Globalization,"](#) on page 5-35

Requirements

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

Do this first



Windows

Do Steps 1-2 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. In your server image, start WebSphere Application Server.

- a. Open the "WebSphere Admin" folder on the Desktop.
- b. Double-click the Start Server1.bat script file.

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



Windows

Do Step 3 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

Image Preparation



Windows

Do all the Image Preparation steps (Steps 1-5) on the ECMEDU01 Server image.



Important

Configure NENU

- If you have completed the “System Configuration” and “Component Configuration” units on this student system, you already configured NENU. You can skip the Step 1.
- If you are working on this unit using a fresh student system, then start with step 1.

1. In your server image, configure NENU for LLLDAP authentication.

In Unit 2 of this class (Components Configuration) 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 ExpenseDemo application to the NENU application folder.

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



Important

Switch to the LLLDAP Authentication Method and configure TravelDocs to use an LLLDAP enabled Database.

The Tivoli Directory Services database is already configured for LLLDAP group authentication. Because TravelDocs is setup as the default Datacap Navigator repository, it must be updated with the Datacap groups that are defined in the Tivoli Directory Services Database.

- If you have completed the “System Configuration” and “Component Configuration” units on this student system, then in the “System Configuration” unit, you already configured the TravelDocs application for LLDAP authentication. You can skip steps 2,3,4 and go to step 5.
- If you are working on this unit using a student system, then you must do Steps 2,3,4 to configure the TravelDocs application to Authenticate using LLLDAP.

-
2. In your server image, copy the LLLDAP enabled Database Admin database for TravelDocs.
 - a. In Windows Explorer, go to C:\DC9-Lab Exercises\TravelDocsDB.
 - b. Right-click the TravelDocsAdm-LLLDAP.mdb file and select Copy.
 - c. Go to C:\Datacap\TravelDocs.
 - d. Right-click anywhere in the folder and select Paste.
 3. In your server image, Connect to LLLDAP enabled Adm database file.

Configure the TravelDocs Admin Database connection string to point to an admin database that has the groups included.

 - a. Click Start > All Programs > IBM Datacap Services > Datacap Application Manager.
 - b. Scroll and select the TravelDocs application in the left pane.
 - c. In the right pane, the database paths are on the Main tab.
 - d. In the Main tab > for the “Administration” field, click the Ellipsis at the right of the field.
 - e. In the “Database connection parameters” dialog box > “Database type or provider name” field, select Microsoft Access (Jet) from the list.
 - f. Click the Database Ellipsis and browse and select the database:
C:\Datacap\TravelDocs\TravelDocsAdm-LLLDAP.mdb
 - g. Click Open.
 - h. Click OK.
 - i. Click “Save changes” and then close the Datacap Application Manager.
 4. In your server image, select the LLLDAP Authentication Method.
 - a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager. or use the shortcut on the desktop.
 - b. In the “Service” tab, click Stop (Red rectangle).

- c. Click the Datacap tab.
 - d. If the “Advanced settings” are not showing, then click “Show advanced”.
 - e. For the “Authentication System” field, select the LLLDAP option from the list.
 - f. In Windows Explorer, open the C:\DC-Lab Exercises\Authentication\DCServiceTemplates.txt file.
 - g. Copy LLLDAP Authentication path template string from the file.
 - h. Paste it in the Authentication path template field.
 - i. Click Save.
 - j. Leave the Datacap Server Manager window open for the next step.
5. In your server image, start the Datacap Server.
 - a. If the Datacap Server Manager is already not opened, click Start > All Programs > IBM Datacap Services > Datacap Server Manager.
 - b. In the Datacap Server Manager window > Service tab, click Start to start the Datacap Server Service. The Start operation is disabled if it is already started.
 - c. Click Close to close the Datacap Server Manager window.

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.



Windows

Do Step 3 on the DCCLIENT Client image. Do all other System Check steps on the server image ECMEDU01.

1. Go to IBM Content Navigator Ping page:
URL: <http://ecmedu01:9080/navigator/Ping>
Or use the “ICN Ping page” shortcut in the Internet Explorer browser.
 - a. Log in using p8admin/IBMFileNetP8.
 - b. Verify that WebSphere resident services are running. You should see the following image,

Key	Value
Product Name	IBM Content Navigator
Build Level	icn203.700.725 (201603280144)
Version	2.0.3
Daeja ViewONE Version	4.1.5.0.2.3581
Operating System	Windows Server 2008 R2 6.1

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

If you see the Content Navigator information this proves that WebSphere is running and that the P8 Content Manager is operational.

2. In your 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 your 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 your server image, log in to the TravelDocs application with Datacap Studio as susan/class 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 susan/class 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 it is servicing authentication requests.

d. Click Exit in the upper right corner of the window to close Datacap Studio.

5. Check Tivoli Directory Services.

a. 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. Check the Tivoli Server is started.
 - a. 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 A for procedures to Start, Check, and Restart components on the Student system.
-

Lesson 5.1. Create Shortcuts for Web Clients

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 system.

You must configure shortcuts on the tmweb > Administrator > Shortcuts menu. These shortcuts define workstation and tmweb executable tasks for an application.

Activities

- [Exercise 1: Configure Web Client Shortcuts](#), on page 5-8

User Accounts

Table 1:

Type	User ID	Password
Server Administrator	Administrator	passw0rd
Workstation Administrator	Administrator	class
	erin	class
	sam	class
	susan	class
	vinny	class



Note

Passwords are always case-sensitive.

Exercise 1: Configure Web Client Shortcuts

Introduction

In this activity, you configure a set of shortcuts for the ExpenseDemo application. Some of them are applicable to thin client, and some for thick client. Shortcuts are displayed as links in Taskmaster Web Operations tab. The shortcuts are also used in the Datacap Desktop client.

Procedures

[Procedure 1, "Define LLLDAP Datacap Groups," on page 5-8](#)

[Procedure 2, "Configure Shortcuts in Web Client," on page 5-9](#)

[Procedure 3, "Verify Quiz Answers," on page 5-11](#)

[Procedure 4, "Use the Web Client to scan and upload," on page 5-13](#)

[Procedure 5, "Use Datacap Desktop to run Profiler," on page 5-14](#)

[Procedure 6, "Use Datacap Desktop to run the verify task," on page 5-14](#)



Important

For this activity, you use the ExpenseDemo application to do the lab activities.



Windows

For this activity, you complete the steps on the Windows 2008 Server system.

Procedure 1: Define LLLDAP Datacap Groups

1. Set authentication to LLLDAP.
 - a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.
 - b. Click Stop.
 - c. Click the Datacap tab and select LLLDAP for Authentication System.
 - d. Verify and if needed set the Authentication path template to:

```
ecmedu01:389/BindUser:cn=p8admin,o=sample?BindPw:IBMFleNetP8?Us
erBaseDn:o=sample?UserSearchFilter:(&(objectClass=person)(cn=<%u
ser%>))?UserShortNameAttr:cn?UserDisplayNameAttr:sn?GroupBaseDn:
o=sample?GroupSearchFilter:(&(objectClass=groupOfNames))?GroupSh
ortNameAttr:cn?GroupDisplayNameAttr:cn?GroupMembershipSearchFilt
er:(&(objectClass=groupOfNames)(member=<%user%>))
```

**Note**

You can copy this string from: C:\DC9-Lab Exercises\Authentication\DCServiceTemplates.txt

- e. Click Save.
- f. Click the Service tab and click Start.
- g. Close the Datacap Server Manager Window.

Procedure 2: Configure Shortcuts in Web Client

1. Log in to the tmweb Client as the Administrator user.
 - a. Open Internet Explorer.
 - b. Click the tmweb link on the taskbar.
 - c. Select the ExpenseDemo application and select enter the credentials as follows:

User ID: susan
Password: class
Station: 1
 - d. Click Login.
2. Go to the shortcuts section.
 - a. Click Administrator and click Shortcuts.
 - b. For shortcuts that are already defined, click the shortcut ID link and verify or set the parameters as defined in the Shortcut Table for the selected shortcut.
 - c. For shortcuts that are not defined, click New to create a shortcut and set the parameters as defined in the Shortcuts table.

Shortcut table

Name	Mode	Permissions
VScan	Auto	Main Job - VScan
Web Scan	Auto	Web Job - iVScan
FixUp	Manual	Fixup Job - Fixup
Upload	Auto	Web Job - Upload
Profiler	Manual for Hold	Main Job - Profiler Web Job - Profiler
Verify/Fix	Manual for Hold	Main Job - Verify Web Job - Verify
Export	Auto	Main Job - Export Web Job - Export
Background	Auto	Main Job - Profiler, Export Web Job - Profiler, Export

3. Configure Shortcuts.
 - a. Enter the Name from the Shortcut table and a description of the shortcut.
 - b. Select the Mode as defined in the Shortcut table.
 - c. The mode determines the behavior of the Datacap when a user clicks the shortcut in the Datacap clients like Datacap Desktop, FastDoc, tmweb, and Datacap Navigator.
 - d. Under the Permissions section, click the check boxes that are listed in the Permissions column of the shortcut table. This entry maps the shortcut to the corresponding task.
 - e. Click Save.
4. Repeat steps 2b - 2f for each entry in the Shortcuts table.



Information

Remember that for a shortcut that is defined on the Administrator > Shortcut tab to be visible, there are three criteria that must be met.

- The user must be configured with permission to do the task.
- The station must be configured to allow users that select that station to do the task.
- The task must be configured with a Program key that is an .aspx web page or set to Multiple.
- In a production environment, you configure each user or group to have permission to do only the tasks that are designated to that user or group.

5. Verify user permissions for each user in the User Permissions table.

User Permissions

Table 2.

User	Group	Permissions
erin	DCUsers	Main Job: Profiler, Export Web Job: Profiler, Export
susan	DCSupervisors	Main Job: All Web Job: All
sam	DCScanners	Main Job: VScan Web Job: iVScan, and Upload
vinny	DCVerifiers	Main Job: Verify Web Job: Verify

- a. Click Administrator and click Groups.
- b. Click the group that is defined in the User Permissions table.
- c. Scroll down to the permissions section and verify that only the permissions that are defined in the Permissions column of the User Permissions table are checked.
- d. Repeat steps 3b - 3c for each entry in the User Permissions table.

**Important**

LLLPAD honors group authentication so the users are only defined in the Tivoli Directory System (TDS). Only groups are defined in the application.

6. Verify Station Permissions.

Station Permissions

Table 3.

Station	Permissions
1	Main Job: All Web Job: All
2	Main Job: All Web Job: All
3	Main Job: All Web Job: All
4	Main Job: VScan Web Job: iVscan, and Upload

- a. Click Stations on the Administrator tab.
 - b. Click the station that is defined in the Station column of the Station Permissions table.
 - c. Verify or set the permissions defined for the station to match the Permissions column of the table.
7. Verify Web Job task configuration.
- a. Click Workflows on the Administrator tab.
 - b. Expand the Web Job.
 - c. Click each of the Web Job tasks and note the Program Key that is defined for each task.

iVScan _____

Upload _____

Profiler _____

Verify _____

Export _____

Check your answers against the answers in the

[Lesson 1.1. Create Shortcuts for Web Clients](#), on page 5-45 of **Appendix 1**.

- d. Logout out and close the Internet Explorer window.

Procedure 3: Verify Quiz Answers

1. Do the Quiz at the end of this lesson.
 - a. If you have trouble answering the question, come back and do the rest of Procedure 3 Step 2-6 to check for the right answer.

Quiz answers are provided in the [Lesson 1.1. Create Shortcuts for Web Clients, on page 5-45 of Appendix 1.](#)

2. Check the answer for Erin when logged in with station 1 selected.

You are still logged in to the Server image desktop as susan.

 - a. Open Internet Explorer, click tmweb on the Bookmark bar.
 - b. Select ExpenseDemo, and enter the following credentials:

User ID: erin
Password: class
Station: 1
 - c. Click Login.
 - d. Which tasks are listed? The listed tasks are the answer to quiz question 2 a.
 - e. Log out of tmweb.
3. Check the answer for susan when logged in with station 1 selected.
 - a. Open Internet Explorer, click tmweb on the Bookmark bar.
 - b. Select ExpenseDemo and complete credentials as follows:

User ID: susan
Password: class
Station: 1
 - c. Click Login.
 - d. Which tasks are listed? The listed tasks are the answer to quiz question 2 b.
 - e. Log out of tmweb.
4. Check answer for sam when logged in with station 1.
 - a. Open Internet Explorer, click tmweb on the Bookmark bar.
 - b. Select ExpenseDemo and complete credentials as follows:

User ID: sam
Password: class
Station: 1
 - c. Click Login.
 - d. Which tasks are listed? The listed tasks are the answer to quiz question 2 c.
 - e. Log out of tmweb.
5. Check answer for vinny when logged in with station 1.
 - a. Open Internet Explorer, click tmweb in the Bookmark bar.
 - b. Select ExpenseDemo and complete credentials as follows:

User ID: vinny
Password: class
Station: 1
 - c. Click Login.

- d. Which tasks are listed? The listed tasks are the answer to quiz question 2 d.
 - e. Log out of tmweb.
6. Check answer for susan when logged in with station 4.
 - a. Open Internet Explorer, click tmweb in the Bookmark bar.
 - b. Select ExpenseDemo and complete credentials as follows:

User ID: susan
Password: class
Station: 4
 - c. Click Login.
 - d. Which tasks are listed? The listed tasks are the answer to quiz question 2 e.
 7. Log out of the web client, close the browser.

Procedure 4: Use the Web Client to scan and upload

1. Log in to tmweb as Sam.
 - a. Open Internet Explorer, click tmweb in the Bookmark bar.
 - b. Select ExpenseDemo and complete credentials as follows:

User ID: sam
Password: class
Station: 1
 - c. Click Login.
2. Process the Scan task.
 - a. Click Operations and then click the Web Scan shortcut.
 - b. Click Browse and go to C:\Datacap\ExpenseDemo\images folder.
 - c. Select the air1_part2.tif image and click Open.
 - d. Set the expected field to 1 and click Scan.

One image is scanned and shown in the Batch View pane.
 - e. Click OK and then click Done.
 - f. Click OK on the message for *Batch date.number finished with a status of finished*.
 - g. Click Stop.
3. Process the Upload task.
 - a. Click the Upload shortcut.
 - b. Click OK on the message for *Batch date.number finished with a status of finished*.
 - c. Click Stop.
 - d. Log out of the web client, close the Internet Explorer.

Procedure 5: Use Datacap Desktop to run Profiler

1. Log in to Datacap Desktop as Erin.
 - a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop.
 - b. Type credentials as follows:

User ID: erin
Password: class
Station: 1
 - c. Click Start. You might be forced to click Stop before you can continue.
 - d. In the left pane, select ExpenseDemo from the applications list.
2. Process the Profiler Task.
 - a. Click the Profiler shortcut.
 - b. Click OK on the message for *Batch date.number finished with a status of finished*.
 - c. Click Stop to complete the task.
 - d. Close the Datacap Desktop window.

Procedure 6: Use Datacap Desktop to run the verify task

1. Log in to Datacap Desktop as vinny.
 - a. Double-click the “Datacap Desktop” shortcut on the desktop.
 - b. Enter the following credentials and click Start.

User ID: vinny
Password: class
Station: 1
 - c. In the left pane, select ExpenseDemo from the applications list.
2. Process the Verify Task.
 - a. In the left pane, click “All”.
 - b. Check that there is a pending batch at the Verify task.
 - c. In the left pane, click “Verify”
 - d. Double-click your batch.
 - e. Click Submit.
 - f. If you are prompted “Validation failed. Override and continue”, click OK in the message window.
 - g. Continue to clicking “Next Problem” from the toolbar, until it a message shows that “End of batch reached” and click OK.
3. Log out and close Datacap Desktop.

End of exercise

Exercise 2: Configure Web Client Shortcuts: Quiz

Quiz Answers are provided in the [Lesson 1.1. Create Shortcuts for Web Clients](#), on page 5-45 of Appendix 1.

1. What would you expect to see as the Program Key for each of the Web Job tasks?

iVScan _____
Upload _____
Profiler _____
Verify _____
Export _____

2. Which of these tasks would you expect to see on the Operations task list.

- a. If you log in to ExpenseDemo as erin with station 1 selected?

Circle correct Answers = None, Web Scan, Upload, Fixup, Verify/Fix

- b. If you log in to ExpenseDemo as susan with station 1 selected?

Circle correct Answers = None, Web Scan, Upload, Fixup, Verify/Fix

- c. If you log in to ExpenseDemo as sam with station 1 selected?

Circle correct Answers = None, Web Scan, Upload, Fixup, Verify/Fix

- d. If you log in to ExpenseDemo as vinny with station 1 selected?

Circle correct Answers = None, Web Scan, Upload, Fixup, Verify/Fix

- e. If you log in to ExpenseDemo as susan from station 4 selected?

Circle correct Answers = None, Web Scan, Upload, Fixup, Verify/Fix

End of exercise

Lesson 5.2. Virtual Stations and Queuing of Tasks

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 system.

You need to know how to use the User ID and the Station ID to determine how jobs are queued for processing.

Activities

- [Exercise 1: Control Queuing Tasks in a Workflow: Quiz](#), on page 5-17
- [Exercise 2: Control Queuing Tasks in a Workflow: Optional](#), on page 5-18

User Accounts

Table 4:

Type	User ID	Password
Server Administrator	Administrator	passw0rd
Workstation Administrator	Administrator	class
	erin	class
	susan	class
	vinny	class



Note

Passwords are always case-sensitive.

Exercise 1: Control Queuing Tasks in a Workflow: Quiz

Introduction

An application is configured with Store and Queue by options in the job tasks as follows:

1. At the VScan step, set **Store** to *Station ID and User ID*.
2. At the PageID step, set **Queue by** to *Station*
3. At the Profiler step, set **Queue by** to *User And Other Station*.
4. At the Verify step, set **Queue by** to *Other User Other Station*.
5. The **susan** user processes the VScan step while logged in to station **1**.

Assume that users erin and susan both have permission to process any job step for the test application.

For each question, indicate the correct answer or the best answer. If the user station combination is allowed to process the step, then choose Pass otherwise choose Fail.

1. Which combination of user and station are allowed to process the PageID step.
 - a. User susan and station 2. Pass or Fail
 - b. User erin and station 2. Pass or Fail
 - c. User erin and station 1. Pass or Fail
2. Which combination of user and station are allowed to process the Profiler step.
 - a. User erin and station 1. Pass or Fail
 - b. User erin and station 2. Pass or Fail
 - c. User susan and station 2. Pass or Fail
3. Which combination of user and station are allowed to process the Verify step.
 - a. User erin and station 1. Pass or Fail
 - b. User susan and station 2. Pass or Fail
 - c. User erin and station 2. Pass or Fail
4. Which combination of User and station are allowed to process the Export step.
 - a. User erin and station 1. Pass or Fail
 - b. User susan and station 2. Pass or Fail
 - c. User erin and station 2. Pass or Fail



Note

If you had difficulty with these questions, then you can do the following optional activity.

Quiz Answers are provided in the [Lesson 1.2 Virtual Stations and Queuing of Tasks](#), on page 5-46 of Appendix 1.

Exercise 2: Control Queuing Tasks in a Workflow: Optional Introduction

In this activity, you apply Store and Queue by options to job steps. You see how these options can control which user and station combination control who can process tasks.

Procedures

- [Procedure 1, "Configure Store and Queue by Options," on page 5-18](#)
 - [Procedure 2, "Process the VScan Task," on page 5-19](#)
 - [Procedure 3, "Test the Profiler Task," on page 5-20](#)
 - [Procedure 4, "Test the Verify Task," on page 5-22](#)
 - [Procedure 5, "Test the Export Task," on page 5-23](#)
 - [Procedure 6, "Use Datacap Desktop to run the verify task," on page 5-14](#)
-



Windows

For this activity, you complete the steps on the Server 2008 ECMEDU01 student system.

Procedure 1: Configure Store and Queue by Options

1. Log in to the web client on the Server 2008 student system.
 - a. Open Internet Explorer, and click the tmweb link on the taskbar.
 - b. Select Application: ExpenseDemo.
 - c. Enter the following credentials and click Login.

User ID: susan
Password: class
Station: 1
2. Delete all pending batches.
 - a. Click the Monitor tab.
 - b. Click the link in the batches column for any batch that is not in the “hold” or “Job done” state.
 - c. Click Delete batch in the lower right corner of the “Selected batch details” window.
 - d. Click OK to acknowledge delete operation.
 - e. Repeat Step 2.b and 2.c for each batch that is not in the “hold” or “Job done” state.
3. Access the Workflow > Main Job tab.
 - a. Click the Administrator tab.
 - b. If it is not Already selected, select Workflow in the ExpenseDemo >> menu bar.

- c. Expand the Main Job node.
4. On the VScan task set Store to Station ID and User ID.
- a. Click the VScan task.
 - b. Select Station ID and User ID from the Store list.
- The initiating user and the initiating station is stored for subsequent queuing decisions.
- c. Click Apply.
5. On the Profiler task, set Queue by to User And Other Station.
- a. Click the Profiler task.
 - b. Select User And Other Station from the Queue by list.
- Only the initialing user who is also authorized to run the Profiler task can run Profiler from any station other than the initialing station.
- c. Click Apply.
6. On the Verify task, set Queue by to Other Station And Other User.
- a. Click the Verify task.
 - b. Select Other Station And Other User from the Queue by list.
- The Verify task can be run from station other than the initialing station by any user other than the initialing user, provided the user is also authorized to run the Verify step.
- c. Click Apply.
7. Select the VScan, Profiler, and Verify tasks again and verify that the selected options are set and saved as described in Step 4, 5, and 6.
8. Log out of the web client and close the Internet Explored window.

Procedure 2: Process the VScan Task

1. Verify that Rulerunner is stopped.
 - a. Click Start > All programs > IBM Datacap Services > Datacap Rulerunner Manager.
 - b. Click Stop if it is running.
 - c. Close the Datacap Rulerunner Manager window.
2. Log in to Datacap Desktop as susan and station 1 and scan a batch.
 - a. Log in to the desktop as user susan / class.
 - b. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop.
 - c. Enter the following credentials and click Start.

User: susan
Password: *class*
Station: 1
 - d. Select ExpenseDemo from the application list if it is not already selected.

3. Use Datacap Desktop to process a batch through the VScan task.
 - a. Click the VScan shortcut.
 - b. Browse to the C:\Datacap\ExpenseDemo\Images folder, select the car1.tif image, and click Open.
 - c. Set the expected field to 1 and click Scan.
One image is scanned and shown in the Batch View pane.
 - d. Click Submit.
 - e. Click OK to acknowledge the Datacap Desktop Batch finished message.
 - f. Click Stop to end the VScan task.
 - g. Click All and verify that there is not a batch at the Profiler task for Station1.
 - h. Close the Datacap Desktop window.



Note

The **initiating user is susan** and the **initiating station is station 1**.

Procedure 3: Test the Profiler Task



Questions

Profiler condition: Only the initialing user who is also authorized to run the Profiler task can run Profiler from any station other than the initialing station.

Do you expect to be able to run the Profiler task as erin from station 1? Yes / No

1. Test the **Profiler task** while you are logged in as **erin** from **station 1**.
 - a. Log in to Datacap Desktop as erin and station 1.
 - b. Click All. There appears to be no batch to run at the Profiler step.
 - c. Click the Profiler shortcut. There is nothing to run.
 - d. Click Stop and close the Datacap Desktop window.



Note

Conclusion: user erin is not allowed to run the Profiler task from station 1.

Why? Erin is not the initiating user and station 1 is the initiating station so other station is also not a match.



Questions

Profiler condition: Only the initialing user who is also authorized to run the Profiler task can run Profiler from any station other than the initialing station.

Do you expect to be able to run the Profiler task as erin from station 2? Yes / No

2. Test the **Profiler task** while you are logged in as **erin** from **station 2**.

- a. Log in to Datacap Desktop as erin and station 2.
- b. Click Stop. There appears to be no batch to run at the Profiler step.
- c. Click the Profiler shortcut. There is nothing to run.
- d. Click Stop.
- e. Close the Datacap Desktop window.



Note

Conclusion: user erin is not allowed to run the Profiler task from station 2.

Why? Erin is not the originating user.



Questions

Profiler condition: Only the initialing user who is also authorized to run the Profiler task can run Profiler from any station other than the initialing station.

Do you expect to be able to run the Profiler task as susan from station 2? Yes / No

3. Test the **Profiler task** while you are logged in as **susan** from **station 2**.

- a. Log in to Datacap Desktop as susan and station 2.
- b. Click Stop if a step is active. You see the batch queued at the Profiler task.
- c. Click the Profiler link.
- d. Click OK when the profiler task is finished.
- e. Click Stop and close the Datacap Desktop window.



Note

Conclusion: user susan is Allowed to run the Profiler task from station 2.

Why? susan is the initiating user and station 2 is not the initiating station.

Procedure 4: Test the Verify Task



Questions

Verify condition: The Verify task can be run from any station other than the initiating station by any user other than the initiating user, provided the user is also authorized to run the Verify step.

Do you expect to be able to run the Verify task as vinny from station 1? Yes / No

1. Test the **Verify task** while you are logged in as **vinny** from **station 1**.

- a. Log in to Datacap Desktop as vinny and station 1.
 - b. Click All. There appears to be no batch to run at the Verify step.
 - c. Click the Verify shortcut. There is nothing to run.
 - d. Click Stop and close the Datacap Desktop window.
-



Note

Conclusion: User vinny is not allowed to run the Verify task from station 1.

Why? vinny is not the initiating user but station 1 is the initiating station.



Questions

Verify condition: The Verify task can be run from any station other than the initiating station by any user other than the initiating user, provided the user is also authorized to run the Verify step.

Do you expect to be able to run the Verify task as susan from station 2? Yes / No

2. Test the **Verify task** while you are logged in as **susan** from **station 2**.

- a. Log in to Datacap Desktop as susan and station 2.
 - b. Click Stop.
 - c. Click All. There appears to be no batch to run at the Verify step.
 - d. Click the Verify shortcut. There is nothing to run.
 - e. Click Stop and close the Datacap Desktop window.
-



Note

Conclusion: user susan is not allowed to run the Verify task from station 2.

Why? susan is the initiating user (no match). station 2 is not the initiating station (match).



Questions

Verify condition: The Verify task can be run from any station other than the initiating station by any user other than the initiating user, provided the user is also authorized to run the Verify step.

Do you expect to be able to run the Verify task as vinny from station 2? Yes / No

3. Test the **Verify task** while you are logged in as **vinny** from **station 2**.

- a. Log in to Datacap Desktop as vinny and station 2.
- b. Click All. The batch is at the Verify step.
- c. Click the Verify shortcut.
- d. Click Submit on the verify panel.
- e. Click OK on the message for *Validation failed. Overide and continue?*
- f. Click OK on the message for *All documents are completed. Finish batch?*
- g. Click OK and click Stop to complete the verify step.
- h. Close the Datacap Desktop window.



Note

Conclusion: user vinny is allowed to run the Verify task from station 2.

Why? vinny is not the initiating user (match). station 2 is not the initiating station (match).

Procedure 5: Test the Export Task



Questions

Export condition: There is no export condition defined.

Do you expect to be able to run the Export task as erin from station 1? Yes / No

1. Test the **Export task** while you are logged in as **erin** from **station 1**.

- a. Log in to Datacap Desktop as erin and station 1.
- b. Click All.

The batch is visible at the Export step. This observation means that Erin can run the Export step as a station 1 user.

- c. Don't run it. Leave the batch at this step for the next test.
- d. Close the Datacap Desktop window.

**Note**

Conclusion: user erin is allowed to run the Verify task from station 1.

**Questions**

Export condition: There is no export condition defined.

Do you expect to be able to run the Export task as susan from station 2? Yes / No

2. Test the **Export task** while you are logged in as **susan** from **station 2**.

- Log in to Datacap Desktop as susan and station 2.

The batch is visible at the Verify step. This observation means that susan can run the Export step as a station 2 user.

- Don't run it. Leave the batch at this step for the next test.
- Close the Datacap Desktop window.

**Note**

Conclusion: user susan is allowed to run the Export task from station 2.

**Questions**

Export condition: There is no export condition defined.

Do you expect to be able to run the Export task as erin from station 2? Yes / No

3. Test the **Export task** while you are logged in as **erin** from **station 2**.

- Log in to Datacap Desktop as erin and station 2.

The batch is visible at the Verify step. This status means that susan can run the Export step as a station 2 user.

- Click the Export shortcut, click OK and click Stop to complete the Export step.
- Close the Datacap Desktop window.

**Note**

Conclusion: user erin and susan are allowed to run the Export task from station 1 or 2 or any other station.

Why? The reason is because no Queue by option is set for the Export task.

Procedure 6: Reset Store and Queue by Options

1. Log in to the web client on the Server 2008 student system.
 - a. Open Internet Explorer, and click the tmweb link on the taskbar.
 - b. Select Application: ExpenseDemo.
 - c. Enter the following credentials and click Login.

User ID: susan
 Password: class
 Station: 1
2. Click the Administrator tab.
 - a. Select Workflow in the ExpenseDemo >> menu bar.
 - b. Expand the Main Job node.
3. On the VScan task set Store to None.
 - a. Click the VScan task.
 - b. Select None from the Store list.
 - c. Click Apply.
4. On the Profiler task, set Queue by to None.
 - a. Click the Profiler task.
 - b. Select None from the Queue by list.
 - c. Click Apply.
5. On the Verify task, set Queue by to None.
 - a. Click the Verify task.
 - b. Select None from the Queue by list.
 - c. Click Apply.
6. Log out of the web client and close the Internet Explored window.



Troubleshooting

If the Status is aborted, then the password for the p8admin account probably needs to be corrected in the Datacap Application Manager > ExpenseDemo > Custom values > Advanced values > FileNetPassword set it to IBMFileNetP8.

End of exercise

Lesson 5.3. Disaster Recovery

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 system.

You are required to make sure that a regular backup is made of both Production and Development systems. This action makes sure that if a failure occurs, you have a recovery point to revert to.

Activities

- [Exercise 1: Backup Strategy: Quiz](#), on page 5-27

Exercise 1: Backup Strategy: Quiz

Introduction

Quiz Answers are provided in the [Lesson 1.3 Disaster Recovery](#), on page 5-47 of Appendix 1.

For each question, indicate the correct answer or the best answer.

1. For each of the server types listed, indicate which fit the description of a Stateless server. Indicate servers that are stateless by marking the True response.
 - a. Rulerunner Servers. **True or False**
 - b. Fingerprint Servers. **True or False**
 - c. Datacap Server. **True or False**
 - d. Database Servers. **True or False**
 - e. File Server. **True or False**
 - f. Web Servers. **True or False**
2. How often must Datacap servers with volatile data be backed up. Indicate your answer by marking True or False.
 - a. Datacap servers must be backed up at a period that the corporate backup strategy determines. **True or False**
 - b. Datacap servers must be backed up every month. **True or False**
 - c. Datacap servers must be backed up every week. **True or False**
 - d. Datacap servers must be backed up every day. **True or False**
 - e. Datacap servers must be backed up when the volume of data capture activity warrants a backup of the volatile data to prevent data loss. **True or False**
3. Which of the following statements are accurate for a valid backup practice for a Datacap Capture system? There is more than one correct answer.
 - a. All servers in the system must be backed up at least weekly and while system activity is at a minimum. **True or False**
 - b. All Stateless servers must be backed up weekly and Data servers (non-stateless) every day at least system performance. **True or False**
 - c. Stateless servers must be backed up one time and thereafter only when system configuration changes occur or service packs are applied. **True or False**
 - d. Servers that hold volatile data (non-stateless) must be backed up in accordance the corporate backup strategy document. **True or False**
 - e. Before a backup of the Web server, make sure that remote scanned batches are uploaded and purged. **True or False**

End of exercise

Lesson 5.4. Configure DB2 Server

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 system.

In this lesson, you configure the DB2 Server database. You then migrate the contents of default Admin, Engine, and Fingerprint Access databases to the DB2 database.

Activities

- [Exercise 1: Convert Access Database to DB2 Database](#), on page 5-29

User Accounts

Table 5:

Type	User ID	Password
Server Administrator	Administrator	passw0rd
Workstation Administrator	Administrator	class
	erin	class
	sam	class
	vinny	class
DB2 Database	p8admin	IBMFileNetP8



Note

Passwords are always case-sensitive.

Exercise 1: Convert Access Database to DB2 Database

Introduction

In this activity, you configure a DB2 9.7 Server database on the Server 2008 student image. You define three database structures for the Admin, Engine, and Fingerprint databases in DB2 Server. You migrate the data from the Access databases to the new DB2 Server databases. You configure the application to use the new DB2 Server databases, and then test the new configuration.

Procedures

[Procedure 1, "Define Database Structures," on page 5-29](#)

[Procedure 2, "Migrate Data from Access to the DB2 Server," on page 5-30](#)

[Procedure 3, "Configure the Application for DB2 Server," on page 5-31](#)

[Procedure 4, "Configure the DB2 client connection," on page 5-32](#)

[Procedure 5, "Verify the DB2 database installation," on page 5-33](#)



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

Only procedure 4 is done on the DCClient Student system.

Procedure 1: Define Database Structures

1. Log in to DB2.
 - a. On the Server 2008 student system login to the desktop as Administrator / passw0rd.
 - b. Click Start > All Programs > IBM DB2 > TDSV63DB2 (Default) > General administration Tools > Control Center.
 - c. Click OK on the Control Center View window.
2. Define databases for the ExpenseDemo tables.
 - a. Right-click All Databases, select Create Database, and select Standard.
 - b. Type or select parameters:

Database name: DCEDDB2
 default path: c:\ (Leave the default value)
 Alias: <blank>
 Comment: DC ExpenseDemo DB2
 Default bufferpool and tab space page size: 32K
 - c. Click Next on the next two screens.
 - d. For Country/Region select “United States of America” and click Next.
 - e. Click Finish. Wait for the process to complete.

- f. Click Close to complete the process.
3. Open Command Editor.
 - a. Click the Command Editor icon  on the toolbar.
 - b. Click Add to select and connect to the target database.
 - c. Select the DCEDDB2 database.
 - d. Leave the “Use implicit credentials” check box set.
 - e. Click OK. This logs you in as administrator.
4. Create the Database tables with the three DB2 scripts.
 - a. Click Open (the folder icon ) in the commands toolbar.
 - b. Go to the C:\datacap\support\DBScript folder.
 - c. Select DB2_Adm_base.sql and click OK.
 - d. Repeat step 2.f-2.h and select the other two DB2 scripts, DB2_Eng_base.sql, and DB2_FP_base.sql.

Note: When you click Open, click No on the DB2 Message window so that the scripts are appended.



Information

The update scripts that are labeled as “Upd9.0.1” are for updating 9.0 database to 9.0.1 database. For this lab exercise, select the ones without the “Upd9.0.1” label.

- e. Click the green arrow in the upper left corner of the command window to run the loaded scripts.
- f. Scan through the activity pane and make sure that no errors are reported.
5. Click Command Editor menu and Select Exit to close the command editor window.
6. Click Control Center menu and select Exit to close the Control Center window.

Procedure 2: Migrate Data from Access to the DB2 Server

1. Click Start > All Programs > IBM Datacap Developer Tools > Datacap Application Copy Tool.
2. Select the Application that you want to convert to use the DB2 database.
3. In the Copy from pane select:
Application name: ExpenseDemo
Note: The application folder, administration database, and Fingerprint database are automatically selected for copying.
4. In the Copy to pane:
 - a. Clear the “Copy application files” check box.
5. Define the Destination DB2 connections.

**Attention**

Do Not attempt to define your own connection string here by using the ellipsis [...].

- a. Copy and Paste the Connection string for the administration database from the Application Manager Generated Connection String from:
C:\DC9-Lab-Exercises\Authentication\DB2ConnectStrings.txt


```
Provider=IBMDADB2;Hostname=ecmedu01;Data Source=Xtreme Sample
Database 2008;Database=DCEDDB2;User
ID=administrator;Password=passw0rd;
```
- b. Repeat steps 5.a for the Fingerprint databases.
- c. Select the Clear Engine database check box.
- d. Click OK to acknowledge that the all existing batches are cleared by selecting this option.
- e. Repeat steps 5.a for the Engine databases.
6. Click OK to activate the database copy step.
 - a. Click OK on the Datacap Application Copy Tool results window that states the "copy was successful".
7. Click Exit to close the Database Application Copy Tool.

Procedure 3: Configure the Application for DB2 Server

1. Start the Datacap Application Manager and select the application.
 - a. Click Start > All Programs > IBM Datacap Services > Datacap Application Manager.
 - b. Select ExpenseDemo application.
2. Select the database.

Database Table

Database	Name	User	Password
Administrator			
Engine	DCEDDB2	Administrator	passw0rd
Fingerprint			

- a. Click the Main tab.
- b. Click [...] for the database that is defined in the Database column of the Database Table.
- c. Select or type:

Database type or provider name: Select IBM DB2
 Host: ECMEDU01
 Database source: Xtreme Sample Database 2008
 Database: DCEDDB2

- d. Set authentication credential.
 - User ID: Click User ID check box and type Administrator.
 - Password: Click the Password check box and type passw0rd.
 - e. Click Test Connection and verify that the connection was successful.
 - f. Click OK.
3. Repeat steps 2b - 2d for each database in the Database table.
4. Click Save Changes and close the Datacap Application Manager.



Windows

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

Procedure 4: Configure the DB2 client connection

The DB2 client software must be installed on all systems that require direct access to the transferred application databases. These systems include the Datacap Server if it is on a different system than the DB2 server, all workstations that process batches or are used for development tasks. The Client Software is already installed on your Windows 7 workstation DCCLIENT.

1. Open the DB2 Configuration Assistant application on the Workstation.
 - a. Click Start > All Programs > IBM DB2 COPY1 (default) > Set-up Tools > Configuration Assistant.
 - b. Click No for the DB2 message question "Would you like to add a database now?"
 - c. Click the Selected menu option and then click Add Database Using Wizard...
 - d. Click Search the Network and then click Next.
 - e. Click Add System and type ECMEDU01 for System Name and then click OK.
 - f. Expand the ECMEDU01, DB2TDS63, and Local databases nodes.
 - g. Click the DCEDEDB2 database and click Finish.

The Add Database Confirmation - DCEDEDB2 window opens.

2. Test the database connection.
 - a. Click Test Connection.
 - b. Click the Standard check box to set it.
 - c. Clear the CLI checkbox.
 - d. Enter database credentials.

User ID: administrator
Password: passw0rd
 - e. Click Test connection.

- f. Verify that you get a message in the results screen that indicates the Standard connection tested successfully.
- g. Click Cancel to close the Test Connection window.
- h. Click Close to close the Add Database Confirmation window.
- i. Click Configure and Exit to close the Configuration Assistant window.



Windows

If you are doing this administration unit as part of a combined administration course and if you already completed the “System Configuration” and “Component Configuration” units on this image, then the systems are configured for you to run the following procedures on either on the Windows 7 DCCLIENT student system or the Server 2008 ECMEDU01 student system.

If you are doing this administration unit on a fresh image, then additional configuration is required to run this procedure on Windows 7 DCCLIENT image. In this case, you should just run this procedure on the Server 2008 ECMEDU01 student image.

In a production environment, you should run on all workstations that are used for development or processing batches.

Procedure 5: Verify the DB2 database installation

To verify the installation, process a document batch through each step of the Document capture process.

1. Start Datacap Desktop and login as the susan user. susan is a supervisor user and is authorized to do all tasks.
 - a. Click Start > All Programs > IBM Datacap Clients > Datacap Desktop.
 - b. Enter the following credentials for LLLDAP authentication mode for Datacap:

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



Note

If your system is in TMA authentication mode for Datacap, then log on as user: *admin* and password: *admin*

- c. Click Start.
- d. Click Stop if necessary to stop task and get back to the main window.
- e. Select ExpenseDemo from the application list.
2. Use Datacap Desktop to run the VScan Task.
 - a. Select the VScan shortcut.

- b. Browse to the C:\Datacap\ExpenseDemo\Images folder and select the car1.tif image.
 - c. Click Open.
 - d. Set the expected field to 1.
 - e. Click Scan. One 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 VScan task.
3. Use Datacap Desktop to run the Profiler Task.
 - a. Select the Profiler shortcut.
 - b. Click OK to acknowledge the Datacap Desktop Batch finished message.
 - c. Click Stop to end the Profiler task.
 4. Use Datacap Desktop to run the Verify Task.
 - a. Click the Verify/Fix shortcut.
 - b. Click Submit to accept the first image.
 - c. Click OK to acknowledge the “Validations failed.”Override and continue?” message.
 - d. Click OK to acknowledge the “All documents are complete. Finish batch?” message.
 - e. Click OK and click Stop to complete the process.
 - f. Close the Datacap Desktop window.

End of exercise

Lesson 5.5. Application Globalization

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system and communicate solution details to the solution architect, administrator, and users.

If you are upgrading to Datacap 9.0.1 you must be familiar with the changes that occurred and how to transfer your procedures and applications.

Activities

[Exercise 1: Configure Globalization](#) on page 5-36

User accounts

Type	User ID	Password
Operating system	Administrator	passw0rd
Datacap	admin	admin



Note

Passwords are always case-sensitive.

Exercise 1: Configure Globalization

Introduction

In this exercise, you configure an application to render the Datacap Navigator and Datacap Desktop client interfaces an a globalization language.

Procedures

[Procedure 1, "Create a Resource.json translation file," on page 5-36](#)

[Procedure 2, "Check the Globalized UI in Datacap Desktop," on page 5-37](#)

[Procedure 3, "Check the Globalized UI in Datacap Navigator," on page 5-39](#)



Windows

Do all the procedures in this lab exercise using the server ECMEDU01 image.

Procedure 1: Create a Resource.json translation file

1. Copy and edit the default resources.json globalization file.
 - a. Open Windows Explorer and go to C:\Datacap\TravelDocs\dco_TravelDocs
 - b. Create a folder named en.
 - c. Copy the dco_TravelDocs\resources.json file to the en folder.
 - d. Open the en\resources.json file with a text editor (Notepad).
 - e. Make some edits to the jobs and job description group in the resources.json file.
 - Sample changes you can make are:
 - Change “Navigator Job” to “Nav Job”.
 - For the job description entries change process to Travel Documents.

```
// jobs and job descriptions
"job.Main Job":"Main Job",
"jobdescription.Main Job":"vscan Travel Documents",
"job.web Job":"Web Job",
"jobdescription.web Job":"web vscan Travel Documents",
"job.Navigator Job":"Nav Job",
"jobdescription.Nav Job":"Navigator scan Travel Documents",
"job.Fixup Job":"Fixup Job",
"jobdescription.Fixup Job":"Document fixup and rescan",
```

f. Make some edits to the shortcut and shortcut description group in the resources.json file.

- Sample changes you can make are:

- Add "Doc" in front of each shortcut value. Example; "Verify" to "Doc Verify".

```
// shortcuts and shortcut descriptions
"shortcut.Verify": "Doc Verify",
"shortcutdescription.Verify": "Data verification with rules validation",
"shortcut.Export": "Doc Export",
"shortcutdescription.Export": "Export data",
```

g. Make some edits to the tasks group in the resources.json file.

- Sample changes you can make are:

- Add "EN" in front of some task values. Example; "Verify" to "EN Verify"

```
"task.PageID": "EN-Page ID",
"task.FixUp": "Fixup",
"task.Verify": "EN-Verify",
"task.Export": "EN-Export",
```

h. Make some edits to the fields group in the resources.json file.

- Sample changes you can make are:

- Change "Car pick-up date" to "Pick-up date".
- Change "Car pick-up location" to "Pick-up location".
- Change "Car return date" to "Return date".
- Change "Car return location" to "Return location".

```
// fields (includes batch-level fields)
"field.Pickup_Date": "Pick-up date",
"field.Pickup_Location": "Pick-up location",
"field.Return_Date": "Return date",
"field.Return_Location": "Return location",
```

i. Save and close the edited Resources.json file.

Procedure 2: Check the Globalized UI in Datacap Desktop

1. Login to Datacap Desktop and select the TravelDocs application.

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

b. Type susan/class for the User and Password and 1 for Station.



Note

If your system is in TMA authentication mode for Datacap, then log on as user: admin and password: admin

c. Click Start.

d. Click the Applications link and select TravelDocs.

2. Verify that you see your changes to the English alternative resources.json file.
 - a. Notice that the task shortcuts you changed now are preceded by “Doc”.
 - b. Click the All link at the top of the links.
3. Start Rulerunner.
 - a. Double-click the Datacap Rulerunner Manager icon on the desktop.
 - b. Click Start.
 - c. Close the Datacap Rulerunner Manager window.
 - d. Wait for one or more batches to advance to the EN-Verify step.
 - e. If there is at least one batch in the Monitor list at the EN-Verify step, then **go to step 5**.
4. Scan a batch and allow Rulerunner to advance it to the EN-Verify step.
 - a. Click the Doc Virtual Scan link.
 - b. Click the Browse for files to scan icon, select a car image and click open.
 - c. Set the expected field to 1, click Scan, and then click Submit.
 - d. Click OK and then click stop to complete the scan task.
 - e. Click All to display the monitor view.
 - f. Notice that the Batch is at the EN-Page ID task.
 - g. Rulerunner advances any batches at the EN-Page ID or Batch Profiler step to the EN-Verify step.



Hint

If you don't see all of the translations correctly, try closing the Datacap Desktop client and restart it.

5. Verify the Jobs and Tasks columns of the Monitor view.
 - a. Notice that any “Navigator Jobs” are displayed as “Nav Jobs” in the Job column.
 - b. If there are any batches at the Page ID, Verify, or Export step, the Task name is preceded by “EN”.
 - c. Double-click the batch at the EN-Verify task to open the Verify panel.
 - d. Notice that the field names for “Car pick-up date” and “Car pick-up location” are “Pick-up date” and “Pick-up location”.
 - e. Correct any verify errors and complete the verify step.
 - f. Close the Datacap Desktop window.
6. Switch Datacap Desktop to use a completely different language.

The Datacap thick clients use the windows desktop language setting to determine which language to use.

- a. Click “Start” and select “Control Panel”.

- b. In the window that opens, click “Region and Language”.
 - c. In the “Region and Language” window, select the “Formats” tab.
 - d. Select German (Germany) for the Format field.
 - e. Click OK and close the Control Panel window.
7. Verify that the German Language translation is being used.
- a. Double click the Datacap Desktop icon on the Desktop.
 - b. Notice that the text on the login screen is in German.
 - c. Type susan/class for the User and Password and 1 for Station.



Note

If your system is in TMA authentication mode for Datacap, then log on as user: admin and password: admin

- d. Notice that the Desktop is also being displayed with German headings.
 - e. Select the TravelDocs Application in the “Anwendungen” field.
 - f. Notice that all of the shortcuts are displayed in German.
 - g. Click the All shortcut and Verify that the batches are displayed with German names for the Jobs and Task names.
 - h. Click one of the batches and notice that the image and properties panel opens on the right side of the screen. Notice also that the property names in the right side panel are in German.
8. Close the Datacap Desktop window.

Procedure 3: Check the Globalized UI in Datacap Navigator

1. Verify and reset the Inter Explorer settings.
 - a. Open the Internet Explorer browser and from the menu, click Tools > Internet Options.
 - b. In the “Internet Options” window > “General” tab, click “Languages”.
 - c. In the “Language Preference” window, verify that no language is listed. skip to step 2.
 - d. If you find any entry, Example: German (Germany) [de-DE] do the following steps:
 - e. Select the entry, and then click “Remove”.
 - f. Make sure the entry is removed and click OK.
 - g. In the “Internet Options” window, click OK.
 - h. Close the Internet Explorer browser window.

2. Open the Datacap Navigator desktop.
 - a. Open the Internet Explorer browser and click the DCN-Datacap link.
 - b. Login. User: susan and password: class



Note

If your system is in TMA authentication mode for Datacap, then log on as user: admin and password: admin

- c. Notice first that everything is still displayed in English. This is because the thin clients that run in the browser are not affected by the Windows desktop language setting. The browsers have their own language setting control.
- d. Notice that the Shortcuts for "Upload", "Verify", and "Fixup" are displayed as "Doc Upload", "Doc Verify", and "Doc Fixup"
- e. Notice that the "Navigator Jobs" displayed in the Jobs column are displayed a "Nav Job".
3. Scan a new car batch and allow it to advance to the Verify task.
 - a. Click the Doc Navigator scan shortcut.
 - b. Click Browse and select a single car image to scan and click Open.
 - c. Click Scan and then when the image appears click Submit.
 - d. Wait for a minute until that batch is advanced by Rulerunner to the Verify task.
Note you might have to click refresh before you see the batch status change.
 - e. When it is at the EN-Verify task, click the batch and then click the Doc Verify shortcut.
 - f. Notice that the field names for "Car pick-up date" and "Car pick-up location" are "Pick-up date" and "Pick-up location".
4. Switch the browser to use a different language.
 - a. Log out of Datacap Navigator.
 - b. While the Internet Explorer Browser window is still open, click Tools > Internet Options.
 - c. In the "Internet Options" window > "General" tab, click Languages.
 - d. In the "Language Preference" window, click Add.
 - e. In the "Add Language" window, select any language other than an English option. Example: German (Germany) [de-DE]
 - f. Click OK.
 - g. In the "Language Preference" window, verify that German is now listed in the "Language:" text box and click OK.
 - h. In the "Internet Options" window, click OK.
 - i. Close the Internet Explorer browser window.

5. Open the Datacap Navigator desktop and verify the new language setting.
 - a. Open the Internet Explorer browser and click the DCN-Datacap link.
 - b. Notice that the text on the login screen is in German.
 - c. Login as susan/class for the User and Password.



Note

If your system is in TMA authentication mode for Datacap, then log on as user: admin and password: admin

- d. Notice that the Desktop is also being displayed with German headings.
- e. Notice that all of the shortcuts are displayed in German.
- f. Verify that the batches are displayed with German names for the Jobs and Task names.
- g. Click one of the batches and notice that the image and properties panel opens on the right side of the screen.
- h. Click the Systemeigenschaften heading to open the properties.
- i. Notice also that the property names in the right side panel are in German.
- j. Log out of Datacap Navigator Desktop.
- k. Close the browser window.

Procedure 4: Restore the globalization settings

1. Restore the globalization settings back to US English for web clients.
 - a. Open the Internet Explorer Browser window, click Tools > Internet Options.
 - b. In the “Internet Options” window > “General” tab, click “Languages”.
 - c. In the “Language Preference” window, Select the German (Germany) [de-DE] and then click “Remove”.
 - d. Make sure the entry is removed and click OK.
 - e. In the “Internet Options” window, click OK.
 - f. Close the Internet Explorer browser window.
2. Restore the globalization settings back to US English for thick clients.
 - a. Click “Start” and select “Control Panel”.
 - b. In the window that opens, click “Region and Language”.
 - c. In the “Region and Language” window, select the “Formats” tab.
 - d. Select English (United States) for the Format field.
 - e. Click OK and close the Control Panel window.

3. Restore the default resources.json file.
 - a. Open windows Explorer.
 - b. Go to C:\Datacap\TravelDocs\dco_TravelDocs\en and rename your resources.json file. This deactivates it and you will default to the ...\\dco_TravelDocs\\resources.json file.
4. Stop Rulerunner.
 - a. Double-click the Datacap Rulerunner Manager icon on the desktop.
 - b. Click Stop.
 - c. Close the Datacap Rulerunner Manager window.

Procedure 5: Check that Datacap Desktop is restored

1. Login to Datacap Desktop and select the TravelDocs application.
 - a. Double-click the Datacap Desktop icon on the Desktop.
 - b. Type susan/class for the User and Password and 1 for Station.



Note

If your system is in TMA authentication mode for Datacap, then log on as user: admin and password: admin

- c. Click Start.
- d. Click the Applications link and select TravelDocs.
2. Verify that your edited English resources.json file is no longer in use.
 - a. Notice that there is no longer any German text.
 - b. Notice that the task shortcuts you changed are not preceded by “Doc”.
 - c. Click the All link at the top of the links.
 - d. Verify that the task names are not preceded by EN-.

Procedure 6: Check that Datacap Navigator is restored

1. Open the Datacap Navigator desktop.
 - a. Open the Internet Explorer browser and click the DCN-Datacap link.
 - b. Type susan/class for the User and Password.



Note

If your system is in TMA authentication mode for Datacap, then log on as user: admin and password: admin

- c. Notice that the Shortcuts are not preceded by Doc"
 - d. Notice that the "Nav Jobs" are displayed in the Jobs column are displayed a "Navigator Job".
-

End of exercise

Appendix 5. Answer keys to quiz

[Lesson 1.1. Create Shortcuts for Web Clients](#), on page 5-45

[Configure Web Client Shortcuts: Quiz](#), on page 5-45

[Lesson 1.2 Virtual Stations and Queuing of Tasks](#), on page 5-46

[Control Queuing Tasks in a Workflow: Quiz](#), on page 5-46

[Lesson 1.3 Disaster Recovery](#), on page 5-47

[Backup Strategy: Quiz](#), on page 5-47

Lesson 1.1. Create Shortcuts for Web Clients

Configure Web Client Shortcuts: Quiz

1. What would you expect to see as the Program Key for each of the Web Job tasks?

iVScan _____ **VScancl.aspx** _____
 Upload _____ **UpIBFcl.aspx** _____
 Profiler _____ **Rulerunner** _____
 Verify _____ **Multiple** _____
 Export _____ **Rulerunner** _____

2. Which tasks would you expect to see on the Operations task list

- a. If you log in to ExpenseDemo as erin with station 1 selected?

Answer = None

- b. If you log in to ExpenseDemo as susan with station 1 selected?

Answer = VScan, Web Scan, Upload, Fixup, and Verify/Fix

- c. If you log in to ExpenseDemo as sam with station 1 selected?

Answer = VScan, Web Scan, and Upload

- d. If you log in to ExpenseDemo as vinny with station 1 selected?

Answer = Verify/Fix

- e. If you log in to ExpenseDemo as susan from station 4 selected?

Answer = Vscan, Web Scan and Upload

Lesson 1.2 Virtual Stations and Queuing of Tasks

Control Queuing Tasks in a Workflow: Quiz

Introduction

An application is configured with Store and Queue by options in the job tasks as follows:

1. At the VScan step, set **Store** to *Station ID and User ID*.
2. At the PagelD step, set **Queue by** to *Station*
3. At the Profiler step, set **Queue by** to *User And Other Station*.
4. At the Verify step, set **Queue by** to *Other User Other Station*.
5. The **susan** user processes the VScan step while logged in to station **1**.

Assume that users erin and susan both have permission to process any job step for the test application.

For each question, indicate the correct answer or the best answer. If the user station combination is allowed to process the step, then choose Pass otherwise choose Fail.

1. Which combination of user and station are allowed to process the PagelD step.
 - a. User susan and station 2. Pass or Fail **Answer = Fail**
 - b. User erin and station 2. Pass or Fail **Answer = Fail**
 - c. User erin and station 1. Pass or Fail **Answer = Pass**
2. Which combination of user and station are allowed to process the Profiler step.
 - a. User erin and station 1. Pass or Fail **Answer = Fail**
 - b. User erin and station 2. Pass or Fail **Answer = Fail**
 - c. User susan and station 2. Pass or Fail **Answer = Pass**
3. Which combination of user and station are allowed to process the Verify step.
 - a. User erin and station 1. Pass or Fail **Answer = Fail**
 - b. User susan and station 2. Pass or Fail **Answer = Fail**
 - c. User erin and station 2. Pass or Fail **Answer = Pass**
4. Which combination of User and station are allowed to process the Export step.
 - a. User erin and station 1. Pass or Fail **Answer = Pass**
 - b. User susan and station 2. Pass or Fail **Answer = Pass**
 - c. User erin and station 2. Pass or Fail **Answer = Pass**

Lesson 1.3 Disaster Recovery

Backup Strategy: Quiz

For each question, indicate the correct answer or the best answer.

1. For each of the server types listed, indicate which fit the description of a Stateless server. Indicate servers that are stateless by marking the True response.

- a. Rulerunner Servers. True or False

Answer = True

- b. Fingerprint Servers. True or False

Answer = True

- c. Datacap Server. True or False

Answer = False

- d. Database Servers. True or False

Answer = False

- e. File Server. True or False

Answer = False

- f. Web Servers. True or False

Answer = True (after scan batches are uploaded)

2. How often must Datacap servers with volatile data be backed up. Indicate your answer by marking True or False.

- a. Datacap servers must be backed up at a period that the corporate backup strategy determines. True or False

Answer = True

- b. Datacap servers must be backed up every month. True or False

Answer = False

- c. Datacap servers must be backed up every week. True or False

Answer = False

- d. Datacap servers must be backed up every day. True or False

Answer = False

- e. Datacap servers must be backed up when the volume of data capture activity warrants a backup of the volatile data to prevent data loss. True or False

Answer = False

3. Which of the following statements are accurate for a valid backup practice for a Datacap Capture system? There is more than one correct answer.
 - a. All servers in the system must be backed up at least weekly and while system activity is at a minimum. True or False

Answer = False

- b. All Stateless servers must be backed up weekly and Data servers (non-stateless) every day at least system performance. True or False

Answer = False

- c. Stateless servers must be backed up one time and thereafter only when system configuration changes occur or service packs are applied. True or False

Answer = True

- d. Servers that hold volatile data (non-stateless) must be backed up in accordance the corporate backup strategy document. True or False

Answer = True

- e. Before a backup of the Web server, make sure that remote scanned batches are uploaded and purged. True or False

Answer = True

Unit 6. Maintenance

Estimated time

03:00 hours

Unit overview

This unit contains these lessons.

Lessons

[Lesson 6.1, "System Maintenance,"](#) on page 6-2

[Lesson 6.2, "Maintenance Manager,"](#) on page 6-7

[Lesson 6.3, "Event Logs,"](#) on page 6-17

Requirements

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

System check

Refer to the system check section at the beginning of unit 1 if your image has been restarted for any reason.

Lesson 6.1. System Maintenance

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 system.

You must be able to implement routine maintenance procedures to ensure smooth operation of the data capture system.

Activities

- [Exercise 1: Maintenance Topic Quiz](#), on page 6-3
- [Exercise 2: Synchronize Job Monitor and Batch Folders](#), on page 6-5

User Accounts

Type	User ID	Password
Server Administrator	Administrator	passw0rd



Note

Passwords are always case-sensitive.

Exercise 1: Maintenance Topic Quiz

Introduction

Each of the topics that is listed fall into one of three Maintenance categories; Routine Maintenance, Preventive Maintenance, or Corrective Maintenance. For each topic, select the Maintenance category that describes the topic best.

1. Release resources.

Routine, Preventive, or Corrective?

2. Monitor system performance to ensure consistent throughput.

Routine, Preventive, or Corrective?

3. Monitor component throughput.

Routine, Preventive, or Corrective?

4. Analyze errors that are reported by System Operators and take corrective action.

Routine, Preventive, or Corrective?

5. Delete processed batches to ensure that the disk resources are recycled.

Routine, Preventive, or Corrective?

6. Check load-sharing across duplicate resources to maximize throughput.

Routine, Preventive, or Corrective?

7. Flush event logs to make sure that they do not grow too large.

Routine, Preventive, or Corrective?

8. Check logs to make sure that errors are not occurring.

Routine, Preventive, or Corrective?

9. Analyze errors that are detected in error logs and take corrective action.

Routine, Preventive, or Corrective?

10. Make sure that Service Level Agreements (SLAs) that stipulate throughput expectations are met.

Routine, Preventive, or Corrective?

11. Producing periodic reports, daily, weekly, monthly, year end.

Routine, Preventive, or Corrective?

12. Configure NENU to detect and handle exceptions.

Routine, Preventive, or Corrective?

13. Use RV2 to produce reports.

Routine, Preventive, or Corrective?

14. Schedule services to mechanical devices like, scanners, printers, filters fans, or air conditioners. Release resources.

Routine, Preventive, or Corrective?

15. Reassign scanners when mechanical failures occur.

Routine, Preventive, or Corrective?**Note**

Refer to [Lesson 2.1. System Maintenance](#), on page 6-28 for the answers to the quiz.

End of exercise

Exercise 2: Synchronize Job Monitor and Batch Folders

Introduction

In this activity, you do a manual comparison between the jobs that are listed in the Job Monitor view and the Application Batch folders. The Job Monitor view is in the tmweb client. If you discover any discrepancies between the two lists, then synchronize them. You either delete Batch folders or deleting jobs from the Job Monitor list.

Procedures

[Procedure 1, "Synchronize Jobs with Batches,"](#) on page 6-5

Procedure 1: Synchronize Jobs with Batches

1. Log in to the Server 2008 ECMEDU01 student system and run the Unit 2L1.bat initialization task.
 - a. If not already logged in to the server, then log in to the Server 2008 student system desktop as Administrator / passw0rd.
 - b. Open Windows Explorer and browse to C:\DC9-LabExercises\MaintenanceLabfiles and double-click Unit2L1.bat.
 - c. Click Run.
 - d. Browse to C:\Datacap\ExpenseDemo\batches.
 - e. Verify that there are some folders with names that start with 20121107, 08 or perhaps the current date. The number of folders depends on how many batches you have run.
2. Open the Datacap Navigator desktop.
 - a. Open the Internet Explorer browser and click the DCN-Datacap link.
 - b. Login. User: susan and password: class
 - c. Select the “ExpenseDemo” application from the list in the banner.
 - d. If prompted, log in as User: susan and password: class
 - e. In the Job Monitor, verify that some jobs are listed.
3. Compare the Job Monitor list with the batches folders.
 - a. Compare the Batches column on the Job Monitor view with the folders displayed in the C:\Datacap\ExpenseDemo\batches folder on the ECMEDU01Server.
 - b. If there are any folders in the C:\Datacap\ExpenseDemo\batches folder that do not have corresponding entries in the Job Monitor list, then delete the extra folders.
 - Right-click the folder and select Delete from the menu.
 - Click Yes on the Delete Folder warning message.
 - c. If there are job entries in the Job Monitor list that do not have corresponding folders in the C:\Datacap\ExpenseDemo\batches folder, then delete unmatched jobs.

- Click the link for the job you want to delete in the Batch column of the Job Monitor view.
 - Click “Delete” in the top toolbar.
 - When prompted, click “Delete” on the confirmation window.
4. Repeat step 3 until you have a one-to-one correspondence between the Jobs that are listed in the Job Monitor view and the C:\Datacap\ExpenseDemo\batches folder.
 5. Log out of the Datacap Navigator and close the Internet Explorer window.
-

End of exercise

Lesson 6.2. 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 system.

You must be able to Configure Datacap Maintenance Manager (NENU) to monitor the status of batches and do the appropriate cleanup activities to automate maintenance procedures.

Activities

- [Exercise 1: Create a NENU Application](#), on page 6-8
- [Exercise 2: Configure an Auto Start Schedule](#), on page 6-14

User Accounts

Type	User ID	Password
Server Administrator	Administrator	passw0rd



Note

Passwords are always case-sensitive.

Exercise 1: Create a NENU Application

Introduction

In this activity, you configure and run the NENU application that is installed on the student image. You configure Windows Task Scheduler to run NENU automatically, and configure NENU to delete batches that are completed.

Procedures

[Procedure 1, "Set a Batch to the Job Done State," on page 6-8](#)

[Procedure 2, "Login to Datacap Studio for NENU," on page 6-9](#)

[Procedure 3, "Configure the AutoDelete Ruleset," on page 6-9](#)

[Procedure 4, "Run the AutoDelete Rule with NENU Manager," on page 6-11](#)



Windows

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



Important

The NENU application is created on the Student system for your convenience. Check that you did the procedure in the Image preparation section at the beginning of Unit 1. This preparation sets up user groups so that NENU can use the LLLDAP Authentication.

Procedure 1: Set a Batch to the Job Done State

1. Log in to tmweb.
 - a. In the Internet Explorer browser, click the tmweb link in the Favorite bar, then:
 - b. Type or Select:

Application: ExpenseDemo
User ID: susan
Password: class
Station: 1.
 - c. Click Login. Taskmaster Web Client opens to the Operations menu.
2. Verify or Set a Batch to the Job done Status.
 - a. Click the Monitor tab.
 - b. If there are batches in the Job Done state, then skip the rest of step 2 and proceed to procedure 2.

- c. Click the link under the Batch column for any job in the list, that was completed during the class.
- d. Select Job Done from the Status field list.
- e. Scroll down if necessary and click Apply.
You now have one batch in the Job Done state that was completed in the last 5 days.
- f. Log out of the tmweb client and close the Internet Explorer window.

Procedure 2: Login to Datacap Studio for NENU

The Student image is already equipped with a NENU application. In this procedure, you use the supplied AutoDelete Ruleset and Profile that is defined in the NENU application.

1. Open the NENU application in Datacap Studio.
 - a. Click Start > All Programs > Datacap > Developer > Datacap Studio.
 - b. If necessary scroll down and select NENU on the Applications window and click Next.
 - c. Type the user credentials and click Finish.

User ID: susan

Password: class

Station: 1

Procedure 3: Configure the AutoDelete Ruleset

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

Note: You need to make seven changes to the AutoDelete Ruleset.

1. Lock the AutoDelete ruleset.
 - a. On the Rulesets tab, click the AutoDelete Ruleset under the NENU Workflow.
 - b. Click the Lock/Unlock Ruleset for editing icon .
2. Set the SetServer parameter.
 - a. Expand the AutoDelete Ruleset.
 - b. Expand Rule1 and expand Function1.
 - c. Select the SetServer action.



Note

The parameter for SetServer should use the name of the server that is specified in the application file expensedemo.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="ecmedu01s">
<k name="tms" ip="127.0.0.1" port="2402" retry="3"/>
</k>
```

AutoDelete Action table

Activity	Parameters
SetServer	tms
SetApplication	ExpenseDemo
SetUser	susan
SetPassword	class
SetStation	1
SetupOpenApplication	Leave blank, no value required.
QuerySetStatus	Job done
QuerySetAge	432000, False
ProcessRunSqlQuery	Leave blank, no value required.
LogWrite RecordSet	Leave blank, no value required.
ProcessDeleteBatches	Leave blank, no value required.

3. Set the SetApplication action.
 - a. Click the SetApplication action.
 - b. Enter the application name (ExpenseDemo) in the Properties pane.
4. Set the SetUser action.
 - a. Click the SetUser action.
 - b. Type the user in the Properties pane.
5. Set the SetPassword action.
 - a. Click the SetPassword action.
 - b. Type the password in the Properties pane.

Note: When you are using LDAP or ASDI Authentication, the SetPassword action is not required. It is also **NOT** acceptable to use the SetPassword action and leave the password blank.
6. Set the QuerySetAge parameter to 432000.
 - a. Click the QuerySetAge action.
 - b. Edit the server parameter in the properties pane to change it to **432000**.

Note: 432000 represents all batches run in the last five days 5x24x60x60. The False parameter indicates that the batch end date is used for evaluating the query. True parameter would indicate that the batch start date is used to evaluate the Query. Using an exclamation point !432000, represents batches older than 5 days
7. Unlock 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 unlocked.
- 8. Configure the DCO.
 - a. In the Document Hierarchy pane Expand the top batch level of the DCO (NENU), and expand the Open node.
 - b. Verify that the AutoDelete: Rule 1 rule is defined.
- 9. Configure the Profile.
 - a. Click Task Profiles tab at the top of the upper right pane.
 - b. Verify that the AutoDelete Profile is defined.
 - c. Verify that the AutoDelete ruleset is defined in the profile.
 - d. Click Exit to close Datacap Studio.

Procedure 4: Run the AutoDelete Rule with NENU Manager

1. Configure AutoDelete with NENU Manager.
 - a. On the Server 2008 ECMEDU01 student system, click Start > All Programs > IBM Datacap Development Tools > Datacap Maintenance Manager. The Datacap Maintenance Manager window opens.
 - b. Click Create on the NENU Manager.
NENU Manager generates a Settings file.
 - c. Click in the empty field to the right of the lib label to modify the Settings. Then, either select a value from the 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 value is the application that contains the NENU Task Profile.
tprofile	AutoDelete	Select the name of the NENU Task Profile.
action_log_level	0	Select the logging level for action messages; 0 provides maximum 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 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 AutoDelete working files.

- e. Click Save to generate the Settings file.
- f. Click Yes if you get a message that indicates that the settings file exists.
- g. The Settings.xml file is saved in the AutoDelete folder in the Batches folder of the selected application.
2. Run NENU to test the AutoDelete 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.
Using Windows Explorer, open the NENU folder under the batches folder of the application C:\Datacap\NENU\batches\NENU_AutoDelete.
 - a. Open the log file, autodelete_rrs.log in WordPad to see the results of the profile run.
 - b. Scroll down and verify that a record in Job Done status was found.
 - c. Find the record that starts with *Running LogWriteRecordSet Action*.
 - d. Verify that a record with all of the information for the batch in the Job done state is written to the log file.

```
13:36:30.72 (16)      t:159C p:56A48D0 Running LogWriteRecordSet
Action...
13:36:30.72 (0)  t:159C p:56A48D0 WriteRecordSet
returned:<rs:data xmlns:rs="urn:schemas-microsoft-com:rowset">
<z:row PB_BATCH="20150712.000000" PB_EXPECTPGS="1" PB_NDOCS="1"
PB_BATCHDIR="C:\Datacap\ExpenseDemo\batches\20150712.000000"
```

- e. Verify that the ProcessDeleteBatches action deleted the batch that the LogWriteRecordSet action logged.

```
13:36:30.87 (15)      t:159C p:56A48D0 Running
ProcessDeleteBatchesEx Action...
13:36:30.103 (16)     t:159C p:56A48D0 Delete Queue ID 1
13:36:30.353 (250)    t:159C p:56A48D0 Running
ProcessDeleteBatchesEx Action...
13:36:30.353 (0)      t:159C p:56A48D0 C:\Datacap\ExpenseDemo
\batches\20150712.000000
```

4. Close the log file.
5. Close the Windows Explorer browser window.
6. Log into tmweb for ExpenseDemo.
 - a. Verify that all batches that you saw at the beginning of the activity with the Job Done status are deleted.

- b. Log out of tmweb and close the Internet Explorer browser window.
-

End of exercise

Exercise 2: Configure an Auto Start Schedule

Introduction

In this activity, you configure Windows Task Scheduler to run NENU automatically at predefined times to do system maintenance tasks.

Procedures

[Procedure 1, "Set a Batch to the Job Done State," on page 6-14](#)

[Procedure 2, "Configure Windows Task Scheduler to Run NENU," on page 6-14](#)



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

Procedure 1: Set a Batch to the Job Done State

1. Log in to tmweb.
 - a. In Internet Explorer, click the tmweb-server link in the Favorite bar.
 - b. Type or Select

Application: ExpenseDemo
 User ID: susan
 Password: class
 Station: 1.
 - c. Click Login.

Taskmaster Web Client opens to the Operations menu.
2. Verify or Set a Batch to the Job done Status.
 - a. Click the Monitor tab.
 - b. If there are batches in the Job done state, then skip the rest of step 2 and proceed to procedure 2.
 - c. Click the link under the Batch column for any job in the list.
 - d. Select Job Done from the Status field list.
 - e. Click Apply. You now have at least one batch in the Job Done state.
 - f. Logout of tmweb and Close the Internet Explorer window.

Procedure 2: Configure Windows Task Scheduler to Run NENU

1. Open the Windows task Scheduler.
 - a. Click Start > Administrative Tools > Task Scheduler.

2. Define a Datacap folder.
 - a. Select Task Scheduler Library under Task Scheduler (Local), and choose New Folder from the Actions pane on the far right.
 - b. Enter Datacap and click OK.
 - c. The new folder is created for your Datacap Scheduled Tasks.
 - d. Expand the Task Scheduler Library and select the Datacap folder.
3. Create a Basic Task.
 - a. Click Create Basic Task in the Actions pane.
 - b. Enter a name (NENU Test) for the task in the Create a Basic Task dialog and click Next.
 - c. Select *One time* in the Task Trigger dialog and click Next.
 - d. Enter the Start date and time in the Daily dialog. Make it 10 minutes from now and click Next.
 - e. Select Start a program in the Action dialog and click Next.
 - f. Browse and select C:\Datacap\Taskmaster\NENU.exe in the Program/script field, then click Open.
 - g. In the Add arguments field, enter the path and file name for the NENU settings file, for example: C:\Datacap\NENU\Batches\NENU_AutoDelete\Settings.xml



Hint

You can go to this folder in Windows Explorer and copy the path.

-
- h. Click Next. In the Summary dialog, select “*Open the Properties dialog for this task when I click Finish.*
 - i. Click Finish. The NENU Properties dialog opens.
 4. Setup Security options.
 - a. Click Change User or Group under Security options.
 - b. Type `Administrator`, click Check Names and click OK.
 - c. Select Run whether user is logged on or not.
 - d. Select Run with highest privileges option and click OK.
 - e. Ensure that the NENU account (user name) is correct.
 - f. Enter the password, class and click OK.
 - g. Click OK to close the Properties window.
 5. Close the Task Scheduler.
 6. Give the scheduler time to run then view the log file.
 7. View the log file.

Using Windows Explorer, open the NENU folder under the batches folder of the application C:\Datacap\NENU\batches\NENU_AutoDelete.

- a. Open the log file, autodelete_rrs.log in WordPad to see the results of the profile run.
- b. Scroll down and verify that a record in Job Done status was found.
- c. Find the record that starts with *Running LogWriteRecordSet Action*.
- d. Verify that a record with all of the information for the batch in the Job done state is written to the log file.

```
14:40:39.400 (0)      t:158C p:37A2090 Running LogWriteRecordSet
Action...
14:40:39.415 (15)     t:158C p:37A2090 WriteRecordSet
returned:'<rs:data xmlns:rs="urn:schemas-microsoft-com:rowset">
<z:row PB_BATCH="20150715.000000" PB_EXPECTPGS="1" PB_NDOCS="1"
PB_BATCHDIR="C:\Datacap\ExpenseDemo\batches\20150715.000000"
```

- e. Verify that the ProcessDeleteBatches action deleted the batch that the LogWriteRecordSet action logged.

```
14:40:39.415 (0)      t:158C p:37A2090 Running
ProcessDeleteBatchesEx Action...
14:40:39.431 (16)     t:158C p:37A2090 Delete Queue ID 41
14:40:39.681 (250)    t:158C p:37A2090 Running
ProcessDeleteBatchesEx Action...
14:40:39.681 (0)      t:158C p:37A2090 C:\Datacap\ExpenseDemo
\batches\20150715.000000
```

8. Close the browser.
9. Go to the tmweb-server, which is still open. Verify that all batches that you saw at the beginning of the activity with the Job Done status are deleted.
10. Log out of tmweb and close the Internet Explorer browser window.

End of exercise

Lesson 6.3. Event Logs

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 system.

You must be able configure event logs, know where to locate them and how to interpret them for system performance and maintenance purposes.

Activities

- [Exercise 1: Configure Rulerunner for ExpenseDemo](#), on page 6-18
- [Exercise 2: Use Quick Log Settings to Analyze Event Log Content](#), on page 6-20

User accounts

Type	User ID	Password
Server Administrator	Administrator	passw0rd
Workstation Administrator	Administrator	class



Note

Passwords are always case-sensitive.

Exercise 1: Configure Rulerunner for ExpenseDemo

Introduction

This lesson required Rulerunner to be configured to run the ExpenseDemo Profiler and Export tasks automatically in the background. This activity configured Rulerunner to do the required background processing.

Procedures

[Procedure 1, "Create a Rulerunner Station for Expense Demo," on page 6-18](#)

[Procedure 2, "Configure Rulerunner to run your applications," on page 6-19](#)



Windows

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

Procedure 1: Create a Rulerunner Station for Expense Demo

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 ExpenseDemo application.
User ID: susan
Password: class
Station: 1
 - c. Click Login.
2. Add Datacap Station.
 - a. Click the Administrator tab and click Stations.
 - b. Click New, and enter:
Name: ECMEDU01
Description: Rulerunner Station
Maximum: 9999
Select Permissions.
Main Job - Profiler, and Export
Web Job - Profiler, and Export
 - c. Click Save.
 - d. Log out and close the Internet Explorer window.

Procedure 2: Configure Rulerunner to run your applications

1. 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. Verify or select Taskmaster Authentication.
 Type:
 User ID: susan
 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.
 - f. Click the Workflow:Job:Task tab.
2. Configuring Rulerunner to run Expense Demo tasks.
 The names of the applications from the datacap.xml file are displayed in the left pane.
 - a. In the right pane, expand the <Thread> node. If there is already an Expense Demo entry, delete it.
 - b. In the left pane, click the ExpenseDemo check box.
 - c. The application tree expands with the Server, Administrator, and Engine databases selected.
 - d. Click the check boxes under the “Main Job”, “Web Job”, and “Navigator Job” for the Profiler, and Export tasks.
 - e. Click the application name Expense Demo and drag it to the thread0 node in the right pane. Release the mouse key while the cursor is hovering over thread0.
 - f. Verify that Main Job Profiler, and Export appear under thread0.
 - g. Click Save (or CTRL+S) to save your changes.
 - h. If you see a warning message “File does not exist”, click Yes to acknowledge the warning and to save the configuration file.
 - i. Make sure that the thread0 check box in the right pane is selected.
3. Disconnect from the application and close the Datacap Rulerunner Manager.
 - a. Click the Rulerunner Login tab.
 - b. Click Disconnect.
 - c. Close the Datacap Rulerunner Manager window.

End of exercise

Exercise 2: Use Quick Log Settings to Analyze Event Log Content

Introduction

In this activity, you disable the Datacap Server logs and the Rulerunner Service log. You process a batch and review if any log output is produced. You then enable certain log options, process batches and review the log output that is produced.

Procedures

[Procedure 1, "Disable the Datacap Server and Rulerunner Server Log," on page 6-20](#)

[Procedure 2, "Process a Batch," on page 6-22](#)

[Procedure 3, "Verify That NoLog Files Are Produced," on page 6-23](#)

[Procedure 4, "Activate Datacap Server Logging," on page 6-23](#)

[Procedure 5, "Process a Batch," on page 6-24](#)

[Procedure 6, "Verify that the tms log is produced," on page 6-24](#)

[Procedure 7, "Activate Rulerunner Server Logging," on page 6-24](#)

[Procedure 8, "Process a Batch," on page 6-25](#)

[Procedure 9, "Verify That Rulerunner Logs Are Produced," on page 6-26](#)



Windows

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

Procedure 1: Disable the Datacap Server and Rulerunner Server Log

1. Open the Datacap Server Manager and stop the Server.
 - a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.
 - b. Click the Service tab.
 - c. Click Stop (Red rectangle) to stop the Datacap Taskmaster Server Service.
2. Set minimal Datacap Server Manager logs.
 - a. Click the Logging tab.
 - b. Click the System event log tab.
 - c. Slide the Message level Slider to the Critical only position at the left of the scale.
 - d. Click the Datacap log tab.
 - e. Clear the “Output to file(s)” check box to disable logging.
 - f. Slide the Number of messages Slider to the left to the None position on the scale.
 - g. Click Save to preserve the settings.

- h. Leave the Datacap Server Manager window open.
 - i. Click the Service tab.
 - j. Click Start (Right green arrow) to start the Datacap Server Service.
3. Start the Rulerunner Manager and stop the Service.
- a. Click Start > All Programs > IBM Datacap Services Datacap Rulerunner Manager.
 - b. Click the Rulerunner tab.
 - c. If the Rulerunner Server is running, click Stop to stop the Server.
 - d. Click the Rulerunner Login tab.
 - e. Select Taskmaster Authentication.
- Type credentials as follows:
- User ID: susan
 Password: class
 Station ID: 1
- f. Click Connect.
4. Set minimal Rulerunner logging with the Quick Log Control.
- a. Click the Logging tab at the top of the screen.
 - b. Click the Quick Log sub-tab.
 - c. Slide the Number of Messages Slider to the No position on the left of the scale.
 - d. Clear the following check boxes on the ATM Log, Rulerunner Log, and RRS Log views one at a time. Verify that all logging options are disabled and the sliders are all on the left.
- On the ATM Log tab, clear Enable ATM Log
 On the Rulerunner Log tab, clear Output to folder checkbox
 On the RRS Log tab, clear the Batch Log checkbox.
- e. Click Save to preserve the settings.
 - f. Leave the Rulerunner Manager window open. You return to start the server again later.
5. Open Windows Explorer and delete the log files.
- a. Open Windows Explorer.
 - b. Delete the log files listed in the Log Files table.

If Rulerunner has never processed any batches you will not see the Rulerunner log files.
Log Files table

Location	Log files
C:\Datacap	tms.log.0.log rulerunner0.log rulerunner_thread_0_atm.0.log
C:\Datacap\RRS\Logs	wrrs-*.* (delete all files)

- c. Close Windows Explorer.
6. Start the Datacap Server Service.
 - a. Go to the Datacap Server Manager window that is still open on the Server 2008 student system.
 - b. Click the Service tab.
 - c. Click Start (Right green arrow) to start the Datacap Server Service.
 - d. Click Close to close the Datacap Server Manager window.
7. Start the Rulerunner Server.
 - a. Go to the Rulerunner Server Manager window that is still open on the Server 2008 student system.
 - b. Click the Rulerunner Login tab and click Disconnect.
 - c. Click the Rulerunner tab.
 - d. Click Start (Right green arrow) to start the Datacap Rulerunner Server.
 - e. Click Close to close the Datacap Rulerunner Manager window.

Procedure 2: Process a Batch

1. Start Datacap Desktop and login as the 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 the ExpenseDemo application from the application list if it is not already selected.
2. Use Datacap Desktop to process a batch through the VScan Task.
 - a. Click the VScan shortcut and click OK to run the next pending batch.
 - b. Browse to the C:\Datacap\ExpenseDemo\images folder, select the car1.tif image, and click Open.
 - c. Set the expected field to 1.
 - d. Click Scan. One image is scanned and shown in the Batch View pane.
 - e. Click Submit. Click OK to acknowledge the Datacap Desktop Batch finished message.
 - f. Click Stop to end the VScan task and close the Datacap Desktop window.

3. Log in to the Taskmaster Web Client as the Supervisor user.
 - a. In Internet Explorer, click the tmweb-server link on the toolbar.

Type or Select the ExpenseDemo application.
 User ID: susan
 Password: class
 Station: 1
 - b. Click Login.
4. View Jobs in the Job Monitor.

Monitor your batches with the Taskmaster Web Job Monitor. Watch batches change status as Rulerunner processes them.

 - a. Click Monitor.
 - b. View the Job Status as Rulerunner processes the 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.

Procedure 3: Verify That No Log Files Are Produced

1. Open Windows Explorer and verify that log files are not created.
 - a. Open Windows Explorer.
 - b. Verify whether any of the log files that are listed in the Log Files table are created.

Log Files table

Location	Log files
C:\Datacap	tms.log.0.log rulerunner0.log rulerunner_thread_0_atm.0.log
C:\Datacap\RRS\Logs	wrrs-*.*.log
C:\Datacap\ExpenseDemo\batches\<yyyymmdd><n umber>	vscan_rrs.log profiler_rrs.log

- c. Close Windows Explorer.

Procedure 4: Activate Datacap Server Logging

1. Open the Datacap Server Manager and stop the Server.
 - a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.
 - b. Click the Service tab.
 - c. Click Stop (Red rectangle) to stop the Datacap Taskmaster Server Service.

2. Set minimal Datacap Service Manager logs.
 - a. Click the Logging tab.
 - b. Click the Datacap log tab.
 - c. Click the *Output to file(s)* check box to enable logging.
 - d. Slide the Number of messages Slider to the middle of the scale.
 - e. Click Save to preserve the settings.
3. Start the Datacap Taskmaster Server Service.
 - a. Click the Service tab.
 - b. Click Start (Right green arrow) to start the Datacap Taskmaster Server Service.
 - c. Click Close to close the Datacap Server Manager window.

Procedure 5: Process a Batch

1. Repeat procedure 2 to process a VScan task with Datacap Desktop and then watch Rulerunner process the Profiler Tasks from tmweb > Monitor.

Procedure 6: Verify that the tms log is produced

1. Open Windows Explorer and verify that log files are created.
 - a. Open Windows Explorer.
 - b. Verify that the log files with Yes in the Status column of the Log Files table were created.

Log Files table

Location	Log files	Status
C:\Datacap	tms.log.0.log	Yes
	rulerunner0.log	No
	rulerunner_thread_0_atm.0.log	No
C:\Datacap\RRS\Logs	wrrs-*.*log	No
C:\Datacap\ExpenseDemo\batches\<yyyymmdd>\<number>	profiler_rrs.log	No

- c. Close Windows Explorer.

Procedure 7: Activate Rulerunner Server Logging

1. Start the Rulerunner Manager and stop the Service.
 - a. Click Start > All Programs > IBM Datacap Services > Datacap Rulerunner Manager.
 - b. Click the Rulerunner tab.
 - c. If the Rulerunner Server is running, click Stop to stop the Server.
 - d. Click the Rulerunner Login tab.

- e. Select Taskmaster Authentication.

Type credentials as follows:

User ID: susan

Password: class

Station ID: 1

- f. Click Connect.
2. Set minimal Rulerunner logging with the Quick Log Control.
 - a. Click the Logging tab at the top of the screen.
 - b. The Quick Log sub-tab is displayed.
 - c. Slide the Number of Messages slider to the Maximum position on the scale.
 - d. Click ATM Log and verify:

All log options are enabled.
The slider is set to all, to the far right of the scale.
 - e. Click Rulerunner Log and verify:

The Thread Log Level Slider is set to All.
All except the “Reflush buffer on each message” options are enabled.
The Application Event Log Level is set to Serious and critical.
 - f. Click RRS Log views and verify:

The *Level of detail that is written to the RRS logs* Slider is set to All.
All options except the “Log Reflush” option are enabled.
The Severity level of messages that are logged is set to All.
 - g. Click Save to preserve the settings.
3. Start the Rulerunner Server.
 - a. Click the Rulerunner Login tab and click Disconnect.
 - b. Click the Rulerunner tab.
 - c. Click Start (Right green arrow) to start the Datacap Taskmaster Server Service.
 - d. Click Close to close the Datacap Rulerunner Manager window.

Procedure 8: Process a Batch

1. Repeat procedure 2 to process a VScan task with Datacap Desktop and then watch Rulerunner process the Profiler tasks from tmweb > Monitor.



Windows

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

Procedure 9: Verify That Rulerunner Logs Are Produced

1. Open Windows Explorer and verify that log files are not created.
 - a. Open Windows Explorer.
 - b. Verify that the log files with Yes in the Status column of the Log Files table were created.

Log Files table

Location	Log files	Status
C:\Datacap	tms.log.0.log	Yes
	rulerunner0.log	Yes
	rulerunner_thread_0_atm.0.log	Yes
C:\Datacap\RRS\Logs	wrrs-* .log	Yes
C:\Datacap\ExpenseDemo\batches\<yyyymmdd>\<number>	profiler_rrs.log	Yes

- c. Close Windows Explorer.
2. Log out of tmweb and close the Internet Explorer window.

End of exercise

Appendix 6. Answer keys to quiz

[Lesson 2.1.System Maintenance](#), on page 6-28

[Maintenance Topic Quiz](#), on page 6-28

Lesson 2.1.System Maintenance

Maintenance Topic Quiz

Introduction

Each of the topics that is listed fall into one of three Maintenance categories; Routine Maintenance, Preventive Maintenance, or Corrective Maintenance. For each topic, select the Maintenance category that describes the topic best.

1. Release resources.

Routine, Preventive, or Corrective? **Answer = Preventative**

2. Monitor system performance to ensure consistent throughput.

Routine, Preventive, or Corrective? **Answer = Routine**

3. Monitor component throughput.

Routine, Preventive, or Corrective? **Answer = Routine**

4. Analyze errors that are reported by System Operators and take corrective action.

Routine, Preventive, or Corrective? **Answer = Corrective**

5. Delete processed batches to ensure that the disk resources are recycled.

Routine, Preventive, or Corrective? **Answer = Preventative**

6. Check load-sharing across duplicate resources to maximize throughput.

Routine, Preventive, or Corrective? **Answer = Routine**

7. Flush event logs to make sure that they do not grow too large.

Routine, Preventive, or Corrective? **Answer = Preventative**

8. Check logs to make sure that errors are not occurring.

Routine, Preventive, or Corrective? **Answer = Routine**

9. Analyze errors that are detected in error logs and take corrective action.

Routine, Preventive, or Corrective? **Answer = Corrective**

10. Make sure that Service Level Agreements (SLAs) that stipulate throughput expectations are met.

Routine, Preventive, or Corrective? **Answer = Routine**

11. Producing periodic reports, daily, weekly, monthly, year end.

Routine, Preventive, or Corrective? **Answer = Routine**

12. Configure Maintenance Manager to detect and handle exceptions.

Routine, Preventive, or Corrective? **Answer = Corrective**

13. Use Report Viewer to produce reports.

Routine, Preventive, or Corrective? **Answer = Routine**

14. Schedule services to mechanical devices like, scanners, printers, filters fans, or air conditioners. Release resources.

Routine, Preventive, or Corrective? **Answer = Preventative**

15. Reassign scanners when mechanical failures occur.

Routine, Preventive, or Corrective? **Answer = Corrective**

End of exercise

Appendix A. Configure Datacap Report Manager (Optional)

Estimated time

01:00

Unit overview

This unit contains these lessons.

Lessons

- [Lesson A.1, "Configure Datacap Report Manager,"](#) on page A-2

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

[Procedure 1, "Verify the EnableLDAP Option," on page A-3](#)

[Procedure 2, "Set Up RV2 Website \(IIS\)," on page A-4](#)

[Procedure 3, "Verify RV2 Login," on page A-5](#)



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"/>`
 If it is not set as false, change it to 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:

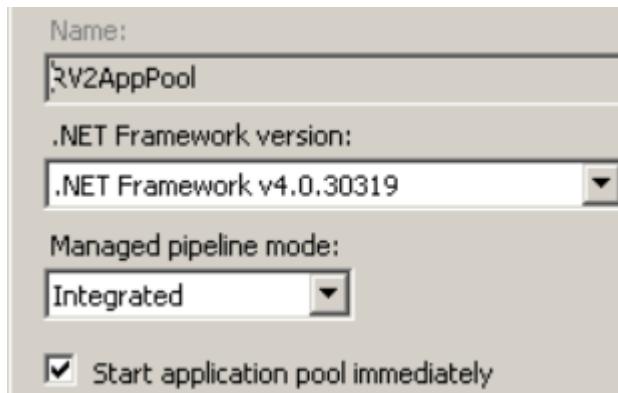
```
<add key="EnableLDAP" value="true"/>
```

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 (LDAP).
- 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 Log Off to log out of RV2 and then close the browser.

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

[Start student system components](#), on page C-2

[Check the WebSphere Application Server](#), on page C-4

[Restart the student system](#), on page C-7

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," on page C-2](#)

[Procedure 2, "Start Datacap Server," on page C-2](#)

Procedure 1: Start student system components

1. Start your Server 2008 system:
 - a. Log in as administrator user (password: passw0rd)
2. Start the WebSphere hosted system components.

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

Start the WebSphere components by running the start script.

- a. From the image desktop, double-click the WebSphere Admin Folder.
 - b. Double-click the Start Server1.bat script.
 - c. A Windows command window opens while the script is running. Wait for the command window to close, which signifies that the WebSphere components are started.
- The start process can take several minutes.
- d. The Terminal window closes when the services started.



Information

The following components are hosted on WebSphere Server1:

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

Procedure 2: Start Datacap Server

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

The Taskmaster Server Manager window is shown.

2. Click the Service tab.

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

Check the WebSphere Application Server

Procedures

[Procedure 1, "Check the WebSphere Application Server,"](#) on page C-4

[Procedure 2, "Check the Content Engine,"](#) on page C-4

[Procedure 3, "Check the Process Engine,"](#) on page C-5

[Procedure 4, "Check the Administration Console,"](#) on page C-5

[Procedure 5, "Check the IBM Navigator,"](#) on page C-5

[Procedure 6, "Check the Datacap Components,"](#) on page C-5

Procedure 1: Check the WebSphere Application Server

1. On your image desktop, double-click the WebSphere Admin folder if it is not already open.
2. Double-click the Administrative console server1 shortcut to go to the WebSphere login window at <https://ecmedu01:9043/ibm/console/logon.jsp>.
3. Log in as `p8admin` user with `IBMfileNetP8` as the password.
If the WebSphere server is running, the page shows the Integrated Solution Console.
 - a. Log out of the Integrated Solutions Console.
4. If an error page is shown instead, the WebSphere is not running. Start it as directed in the procedure [Start student system components](#), on page 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.



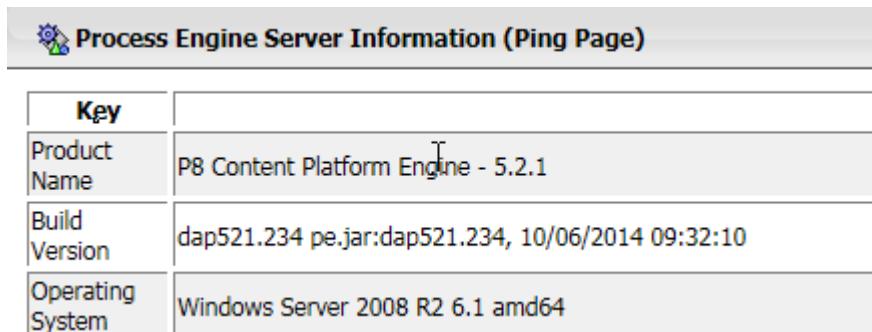
Key	
Product Name	P8 Content Platform Engine - 5.2.1
Build Version	dap521.234
Operating System	Windows Server 2008 R2 6.1

2. If an error page is shown instead, the Content Engine is not running. Start it as directed in the procedure [Start student system components](#), on page 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.



A screenshot of a web page titled "Process Engine Server Information (Ping Page)". The page contains a table with four rows:

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

3. If an error page is shown instead, the Process Engine is not running. Start it as directed in the procedure [Start student system components](#), on page 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.

Name	Description
Verify/Fix	Verify task
VScan	Remote Virtual Scan

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

Restart the student system

Procedures

[Procedure 1, "Restart the student system \(if needed\)," on page C-7](#)

[Procedure 2, "Start the Content Engine \(use only if required\)," on page C-7](#)

Procedure 1: Restart the student system (if needed)

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

1. Stop the WebSphere hosted system components.

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

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

2. Stop the Datacap Server service.

- a. Click Start > All Programs > IBM Datacap Service > Datacap Server Manager.
- b. The Taskmaster Server Manager window is shown.
- c. Click the Service tab.

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

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

3. Restart the windows server.

- a. Click Start > Restart.
- b. Do [Procedure 1, "Start student system components," on page 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 `IBMFfileNetP8` as the password.
 4. Expand the Applications > Application Types node in the left pane, and then click WebSphere enterprise applications.
In the right pane, the Content Engine application is listed as `FileNetEngine`.
 5. Check the status of the application. If a red X is shown in the Application Status column, the application is stopped.
 6. If the `FileNetEngine` application is stopped, select the check box for `FileNetEngine` and click Start.
 7. Log out of the console and close the browser.
-

Configure Datacap Rulerunner for TravelDocs

Procedures

Procedure 1: Stop and Connect

1. Open the Rulerunner Server Service properties.
 - a. Double-click the Rulerunner Server Manager on the desktop.
 - b. Click Stop if the Rulerunner is already started.
 - c. Click the Rulerunner Login tab to display it.
 - d. Select Taskmaster Authentication.
Type:
User ID: admin
Password: admin
Station ID: 1
 - e. Click Save if you changed the User ID or Station ID. If you only entered the password the Save control will not be active.
It is critical that these credentials are saved because they are used at runtime.
 - f. Click Connect.

Procedure 2: Configure TravelDoc tasks

2. Configuring Rulerunner to run tasks.
 - a. Click the Workflow:Job:Task tab to display it.
The names of the applications from the datacap.xml file are displayed in the left pane. The right pane does not contain threads the first time you use Rulerunner Manager.
 - b. If you don't see a list of application in the top left pane, click the full screen icon in the top right corner.



Note

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

-
- c. If a thread did not already exist or if you want to create a new thread then right-click in the right pane, select Threads, then select Add Thread.
A new thread is created in the right pane. For this exercise you use the existing thread.
 - d. In the left pane, click the TravelDocs check box.
 - e. The application tree expands with the Server, Administrator, and Engine databases selected.

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

Enable Datacap Rulerunner logging

1. If Rulerunner is connected then do [Procedure 1, "Stop and Connect,"](#) on page 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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