IBM Software Group

An IBM Proof of Technology

Discovering the value of IBM Enterprise Report Management featuring IBM Content Manager OnDemand

Instructor Guide

PoT.IM.07.1.047.02

IBM Content Manager OnDemand - Proof of Technology -

Contents

Discovering the Value of IBM Enterprise Report Management featuring IBM Content Manager OnDemand

Proof of Technology

A Proof of Technology, PoT, is a repeatable workshop with a one-on-many (one session, multiple customers) design point. Positioned later in the sales cycle, the PoTs are designed to give attendees a "deep dive" of the technology through demonstration, presentation, and hands on labs in a controlled environment. PoTs can run from one to three days in length, are held in a Technical Exploration Center, and target technical decision makers and evaluators. The objective is to expose the usability, documentation, and manageability of an IBM offering. The PoTs are sales events intended to accelerate decision making and reduce the sales cycle. Ideally, customers should be in at least Sales Cycle 2 and in the process of evaluating the product/solution.

The benefits of a Proof of Technology include:

- Reducing the need for time consuming and costly POCs
- Influencing scope of follow-on POC, if required
- Demonstrating value and building confidence in the product/solution
- Demonstrating how technologies can be applied
- Demonstrating technology and introducing complementary products (opportunity to upsell)
- Enhancing customer relationships

Description

Through presentations and hands-on exercises, the Enterprise Report Management Proof of Technology will demonstrate to participants how IBM Content Manager OnDemand can automate and streamline the capture, indexing, and storage of print datastreams and other computer-generated output. This workshop will demonstrate how to:

- Utilize the Web Interface for Content Management (WEBI) client to search, retrieve, view, print and e-mail computer generated content.
- Use the OnDemand Report Wizard to define report profiles and load sample data.
- Repurpose existing reports for end user viewing.
- Use report mining tools to analyze report data.
- Use OnDemand security to restrict viewing of specific data within a report based on individual user.
- Understand how OnDemand can be used to meet SEC requests and maintain regulatory compliance.

Objective

The objective of the Enterprise Report Management Proof of Technology is to assist anyone who is currently exploring how to capture and deliver reports, statements and other computer-generated output across their organization. This session will demonstrate how to utilize IBM Content Manager OnDemand to meet those challenges. Participants will learn, through a combination of presentations and lab exercises, how to bring all the elements of Content Manager OnDemand together into a unified, and automated, Enterprise Report Management solution. After completing this Proof of Technology, participants will be able to describe the capabilities and benefits of the IBM Content Manager OnDemand solution and understand how that solution can be utilized to resolve report management challenges.

Prerequisites

None.

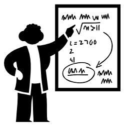
Chapter 1

Financial Services Scenario

This chapter provides an overview of the Financial Services scenario which will be used throughout the workshop.

Chapter Contents

This chapter contains the following topics:



Financial Services Scenario Overview

The following details the actors, content, and scenario associated with the OnDemand financial services solution.

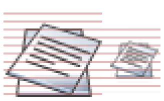
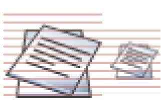
Actors

This solution consists of the following internal and external actors.

Actor	**Description**
Carly Gant	Carly is a customer of Focus Corporation. She invests in various mutual funds through regular payroll contributions and occasional online purchases.
Lisa Thomson	Lisa is a Customer Service Representative (CSR) with Focus Corporation and will be assisting Carly with inquiries about her investment account.
John Hart	John is Carly’s financial advisor. Carly corresponds with John when she needs to consult about her investments.
Bob Palmer	Bob is the Fund Manager with Focus Corporation.
Fred Frey	Fred is a Focus Corporation fund analyst who concentrates on the International Undiscovered investment fund.
Ann Martin	Ann is the Records Manager for Focus Corporation. She handles inquiries from regulatory commissions.
Steve Miller	Steve works for the Securities and Exchange Commission (SEC). He requests, receives and analyzes stock and bond transactions for U.S. corporations.

Content

This solution consists of the following content.

Content	Description
Monthly Statements	A PDF rendition of Carly's monthly statement from Focus Corporation, showing the value of her portfolio and the performance of each investment.
Consolidated Summary	A PDF summary of Carly's year-to-date monthly statements generated and emailed to Carly by the CSR. This summary statement contains targeted marketing messages.
Electronic Correspondence	Earlier in the year, Carly e-mailed her financial advisor a Word document, authorizing changes to her financial portfolio
Check Images 	Electronic images of checks that Carly wrote for stock purchases that were not part of her normal investment plan.
Monthly Transaction Summary 	Focus Corporation creates monthly reports listing all of their customers' financial transactions. This is created in "line data" format and is used internally with Focus Corporation.
Compliance Reports 	Focus Corporation creates a year-to-date report which contains detailed information for all securities purchased and sold. This data is made available to the SEC and other regulatory agencies.

Scenario

Customer service is essential to maintaining and expanding a company's customer base and market share. At the same time, using self-service facilities allows companies to provide a high level of support while keeping costs to a minimum. Inquiries that previously required the intervention of a service representative can now be accomplished by the customer themselves online through web applications. Information that used to be difficult to get from archived media is now available easily and quickly. Further, once that information is retrieved, it can be shared, repurposed, and even data mined to gain additional benefit from the wealth of archived information.

Lab	Action	Features Demonstrated
1	Getting to Know the IBM OnDemand Solution	• Access, search and retrieve OnDemand content • Full fidelity viewing of content • Share this information by emailing to outside participants
2	Providing Additional Value Using the OnDemand Solution	• Retrieve multiple content items and bundle into a single unit for transmittal • Instant analysis of content to provide an additional marketing message when sending content to customer • Find documents related to each other and easily view them • Integration with Business Processing application
3	Customer Self-Service Benefits	• Retrieve data for the purposes of data mining
4	How Content is Loaded into OnDemand	• Automatically load content from external sources
5	Protecting OnDemand Data	• Use customized views to keep users from viewing unauthorized portions of reports

Lab	Action	Features Demonstrated
6	Making OnDemand Content Available	• See how OnDemand can be used to filter, summarize and repurpose large amounts of data that is stored in OnDemand.
7	Using the OnDemand Report Wizard (optional)	• Experience “first-hand” how to use the OnDemand Report Wizard to define report profiles and load sample report data.

Chapter 2

Technical Exploration Centers

The Technical Exploration Center (TEC) system is a service organization to the field technical sales team.

The Technical Exploration Centers primarily do four things, which are designed to match and support the stages that a customer goes through when deciding on which technologies and vendors to use for a particular project or initiative.

Briefings for technical executives such as Chief Technology Officers, Chief Architects, or Directors over large parts of a company's IT infrastructure. These briefings are designed to introduce a technology or idea to a decision maker, in the hope of planting the seeds for an opportunity. This effort is called Technical Evangelism.

Hands-on experiences for technical decision makers such as Development Leaders, Lead Systems Analysts, or Software Architects who are charged with leading parts of a company's IT projects. Generally these are hands-on classes that serve to expand a participant's understanding of a product or technology, and thereby influence their purchase decision. They frequently occur as a second step after executives have participated in a Technical Evangelism event and an active opportunity is being nurtured. This effort is called Technical Exploration. A good example is the IBM Proof of Technology event series.

Custom-built demonstrations designed for individual technology buyers and decision makers. Generally these are built to prove a particular capability or function will operate as expected in the customer's environment and with their actual data. Frequently these demonstrations are built using existing components from other demonstrations or industry examples. They are often used to eliminate the remaining technical hurdles to a sale, and thus occur as a third step after a hands-on experience. A good example is a proof of concept built directly to a customer's needs by an IT Specialist.

Educational opportunities for our own IT Specialist and IT Architect communities. The TEC provides a learning environment which is ideal both for the delivery of formal technical enablement offerings, as well as ad-hoc personal skill development and practice. We call this effort Technical Enablement. A good example is a Software Technical Education Workshop (or STEW) offered by the WebSphere technical enablement team.

Scheduling

TEC centers offer a wide array of resources to support Proof of Technologies, including hardware, installation support, lecture rooms, and catering.

TEC resources are scheduled via the web. Visit the TEC website: http://techworks.dfw.ibm.com/techworks/web.nsf/doc/BCUO-79ETNH?OpenDocument

The form will prompt you to enter your requirements. We suggest the following resources for this PoT:

- One room for lecture and hands-on labs
- Optional room for break-out discussions
- One T60 ThinkPad (Minimum of 2GB memory, 25GB free disk space) for each student (note that no network connection is required)
- TEC staff assistance to load the PoT image from the TechWorks website onto the client computers. The image is available as a VMWare Workstation (5.5+) format.

Schedule the hardware at least a day in advance to ensure time to for loading the VMWare image, correcting for any problems, and set up.

Once the form is complete, a TEC representative will contact you to confirm your reservation.

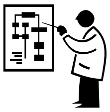
Chapter 3

Same-Day Preparation

Chapter Contents

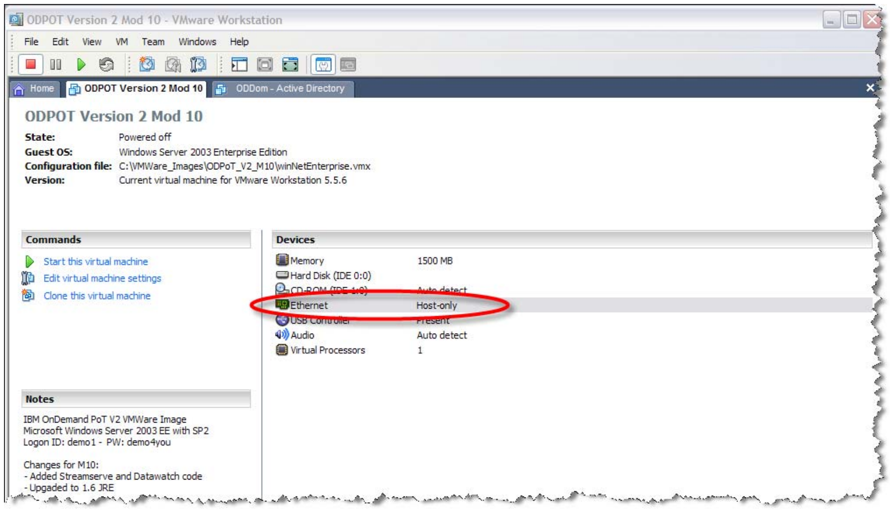
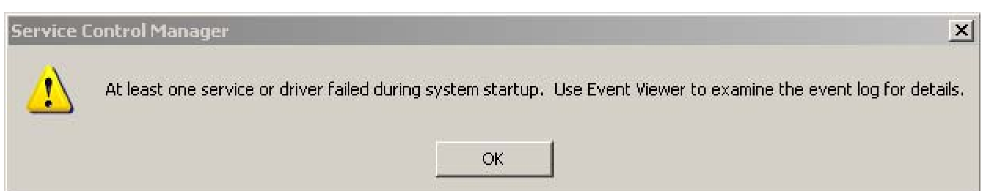
This chapter contains the following topics:

All of the steps in this chapter should be performed on each workstation prior to the beginning of the PoT.

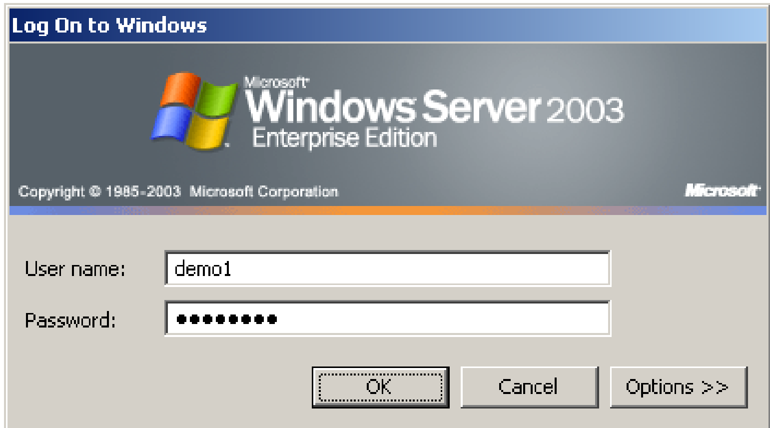


Step-by-Step – Initial Start-Up

In this section we will look at a couple of things you need to consider during initial startup of the VMWare image.

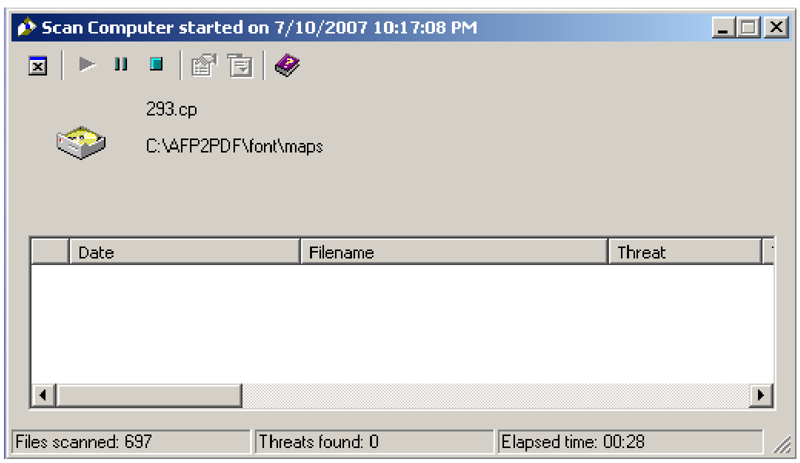
Step	Action
1	 This VMWare image should be run in **Host-only** mode. • Start the VMWare program • Before starting the VMWare image, ensure that the **Ethernet** connection is set to the **Host-only**.
2	In most cases, during initial startup, you will receive a message that one or more services failed to start. We will address this in the next section.  • For now, click the **OK** button to close this message.

Step	**Action**
3	

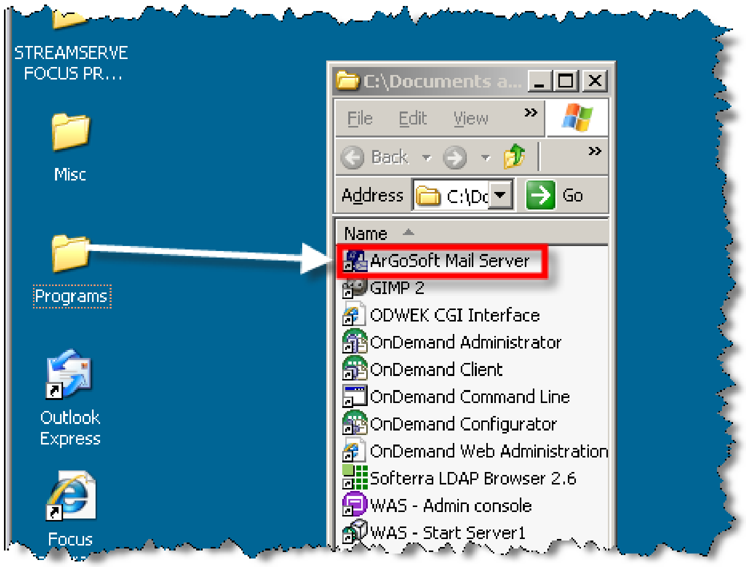


- Logon with a User Name of **demo1** and a password of **demo4you**.
- Run this image in full screen mode by selecting **View → Full Screen**.

4 If Symantec AntiVirus begins running, go to the **Applications** tab of Task Manager and cancel the scan.

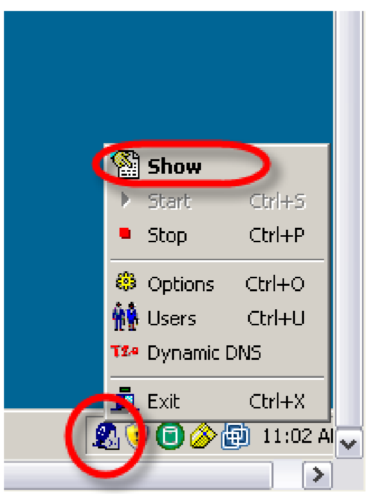


Step	Action
5	**Start the ArGoSoft Mail Server**

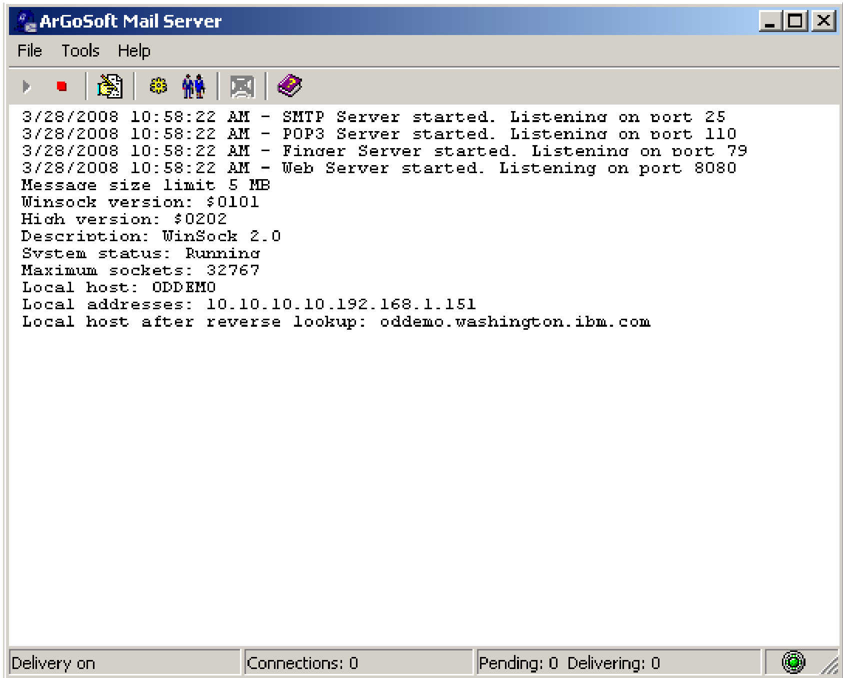


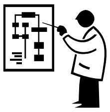
- Open the **Programs** folder on the desktop and double-click on **ArGoSoft Mail Server** to start the mail server.

Step	Action
6	**Note:** ArGoSoft will run as a background process. Notice the ArGoSoft icon in the system tray in the bottom right corner of the desktop. To view ArGoSoft processing messages, right-click on the icon and click on **Show**.



Step	Action
7	You will see the ArGoSoft Mail Server messages screen as shown below. For the purposes of the PoT, minimize this screen, DO NOT CLOSE IT!.



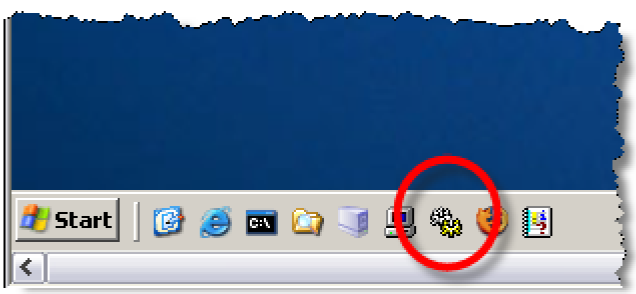
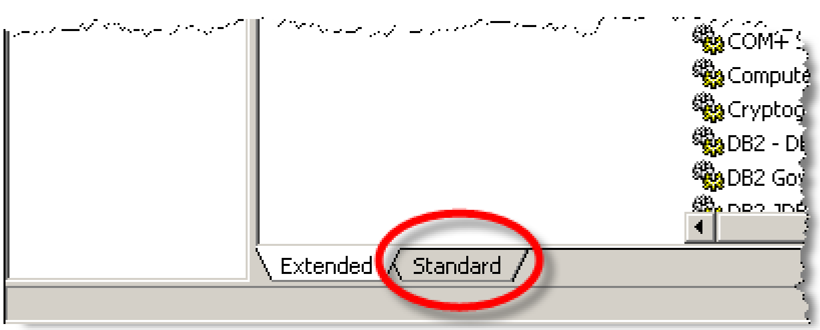


Step-by-Step – Start the Windows Services

In this section, you will start the Windows services that are required for this PoT. There are five sets of services that must be running:

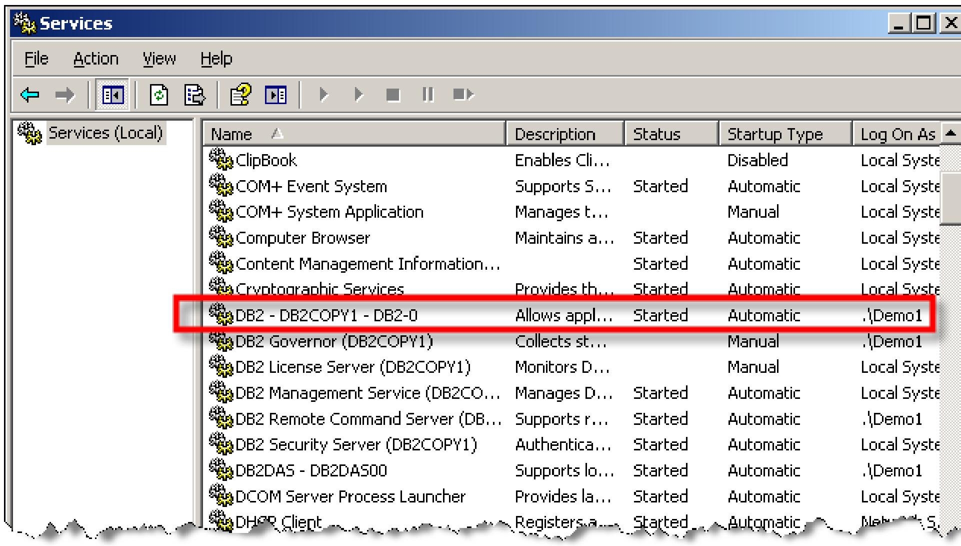
- DB2 Services
- HTTP Server
- OnDemand services
- Monarch RMS services
- StreamServe services

We will take a look at each of these in turn.

Step	Action
1	 • In the toolbar at lower left corner of the desktop, click on the "Services" icon.
2	 • At the bottom of the services window, click on the **Standard** tab.

Step	Action
3	**DB2 Services**

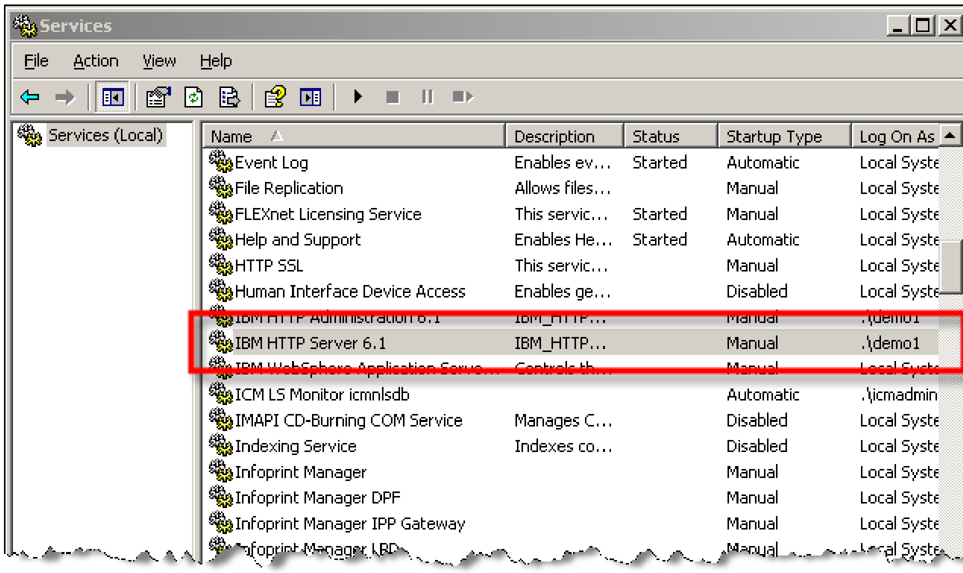
Occasionally, if the initial startup takes a long time, the DB2 startup will time out and the DB2 servicer will fail to start. If this happens, OnDemand will also fail to start, since it depends on DB2.



- Scroll down and locate the **[DB2 – DB2COPY1 – DB2 – 0]** service. If this service is not started, right-click on the service and select **Start**.

Step	Action
4	**HTTP Server**

The IBM HTTP Server 6.1 service must be started for Monarch RMS to function correctly.

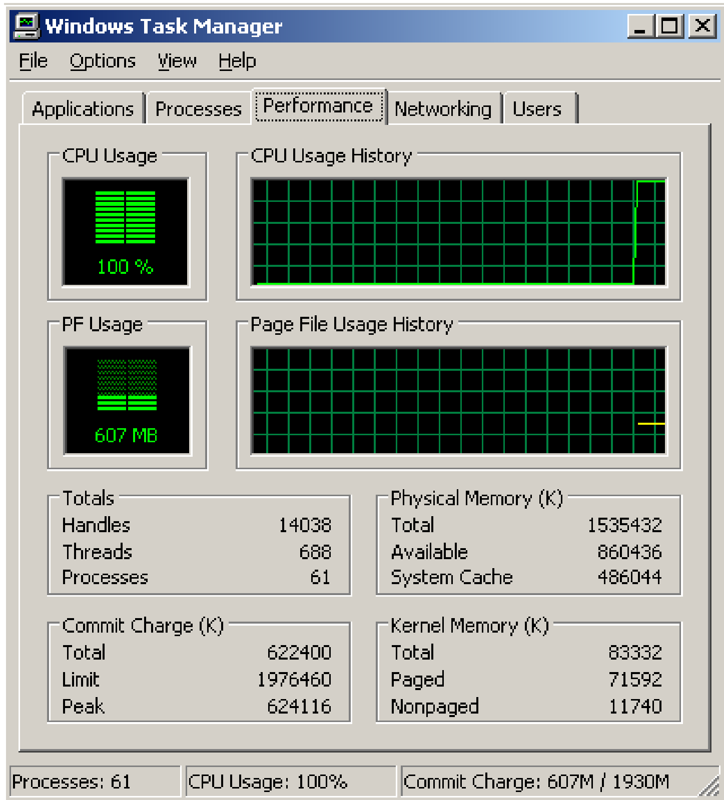


- Scroll down and locate the HTTP Server.
- Right-click on **[IBM HTTP Server 6.1]** and select **Start**.

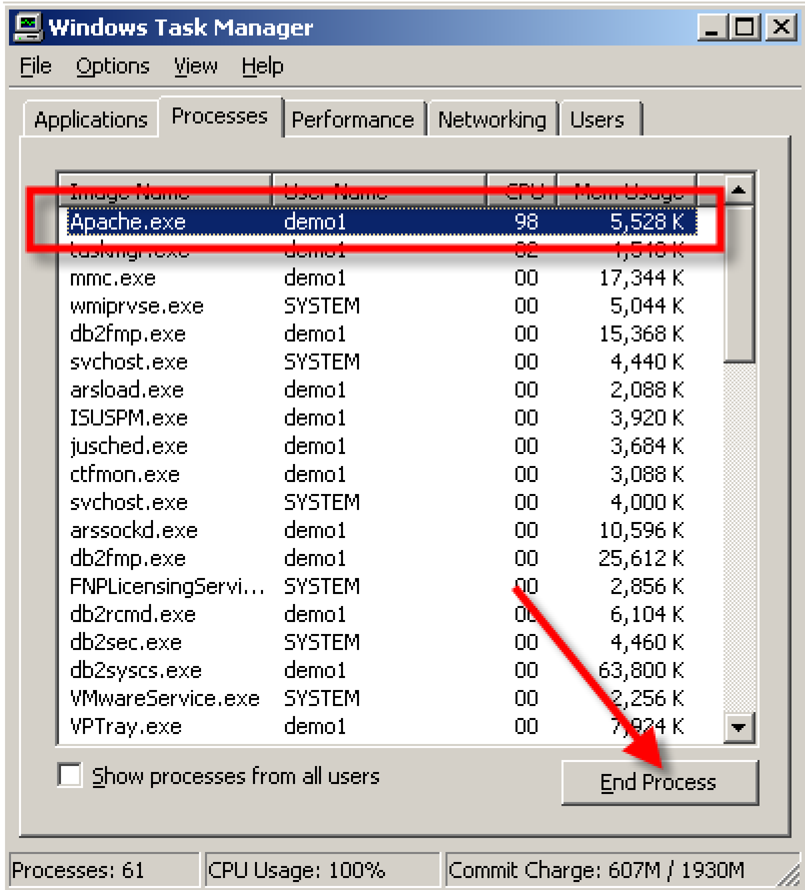
There is a known problem with HTTP server that will occasionally cause the startup to fail and you will get the following error message:

- If the HTTP Server starts successfully, skip to step 7, otherwise go to the next step to resolve this problem.

Step	Action
5	If the HTTP Server fails to start, it is typically caused by the **Apache.exe** service hanging and holding 100% of the CPU.



- Open the Windows Task Manager and click on the **Performance** tab. You should see CPU Usage at 100%.
- Click on the **Processes** tab.

Step	Action
6	

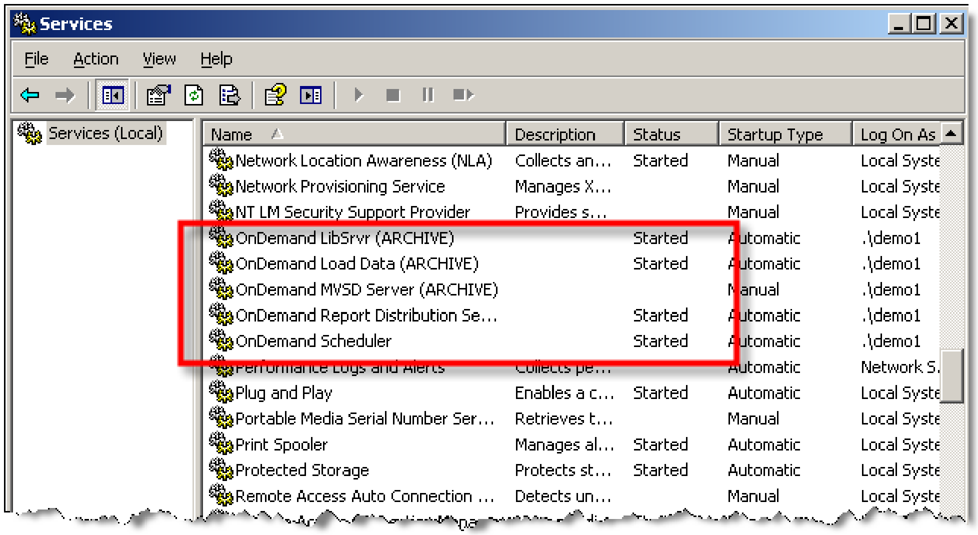
- Locate the **Apache.exe** process. Notice that it is holding almost 100% CPU usage. Select the **Apache.exe** service and click the **End Process** button.

Note: you can quickly find the **Apache.exe** process by clicking the CPU heading twice to sort that column in descending sequence.

- Once this process ends, close task manager. Return to the Windows Services screen and try to start the **IBM HTTP Server 6.1** again. This time it should start successfully.

Note: the IBM HTTP Administrator service does not need to be running for this LAB. In fact, if you try to start it, it will fail, since another process is using the port that the HTTP Administrator needs. This is OK.

Step	Action
7	**OnDemand Services**



- In the list of services, scroll down and locate the OnDemand Services.

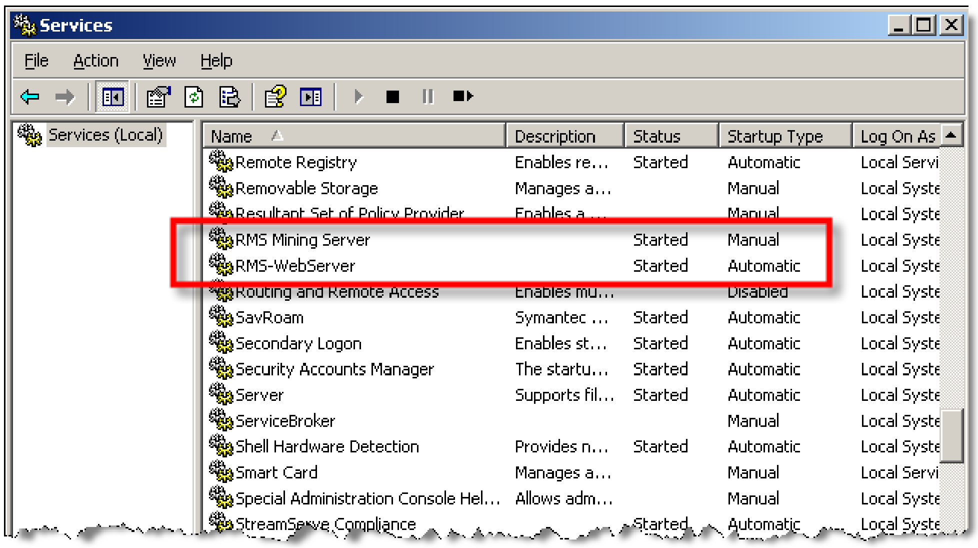
The **LibSrv (ARCHIVE), Load Data (ARCHIVE),** and **Report Distribution Server** services must all be started. Typically you will only need to start the Report Distribution Server, since it does not auto-start.

Occasionally, if the VMWare image takes a while to fully come up, the LibSrv and/or the Load Data service may not be started. In all cases, make sure that the LibSrv service is started before you start either of the other two services.

Step	Action
8	**Monarch RMS Services**

There are three Monarch RMS services that must be started:

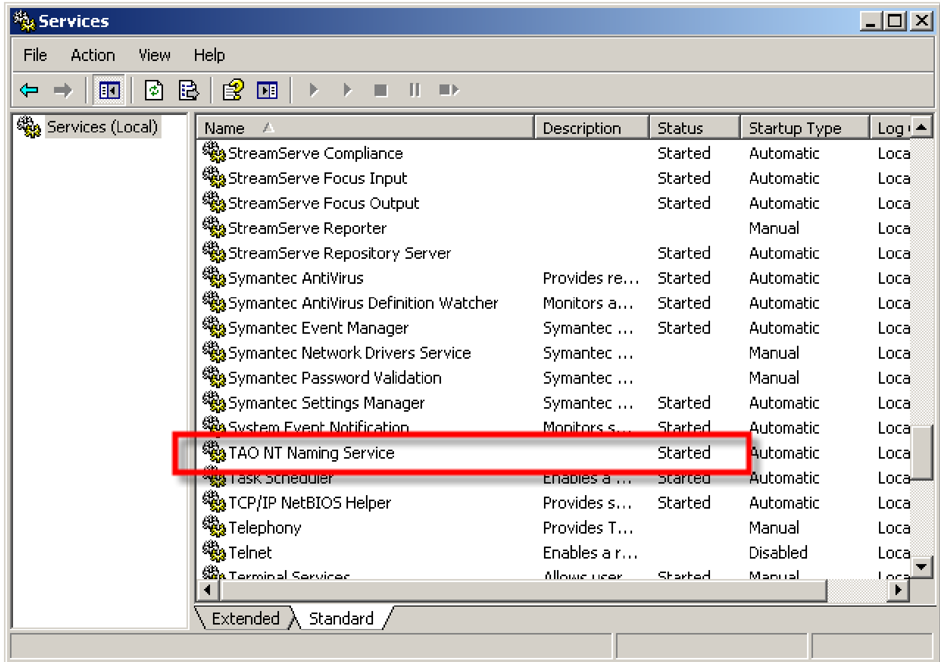
1) RMS Mining Server
2) RMS-WebServer
3) TAO NT Naming Service



- Scroll down and locate the RMS Services. You will need to start the **RMS Mining Server,** but the **RMS-WebServer** should already be running.

Note: if you ever need to restart these services, the **RMS WebServer** must be started before you start the **RMS Mining Server**.

Step	Action
9	



- Scroll down and locate the **TAO NT Naming Service**. This service should already be started, if it is not, start it.

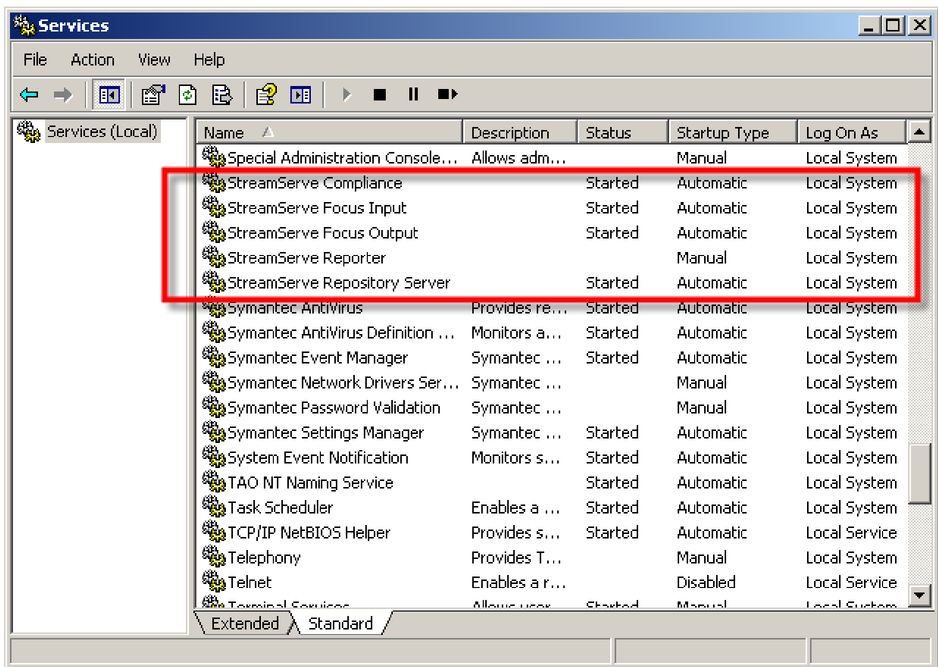
Step	Action
10	**StreamServe Services**

There are four StreamServe services that must be started:

1) StreamServe Repository Server
2) StreamServe Compliance
3) StreamServe Focus Input
4) StreamServe Focus Output

- If all of these services are started, skip to the next section, "**Step-by-Step – Prime the System**". If they are not, continue in this section.

Note: there is a fifth StreamServe service named **StreamServe Reporter**. This service does not need to be running for this lab.



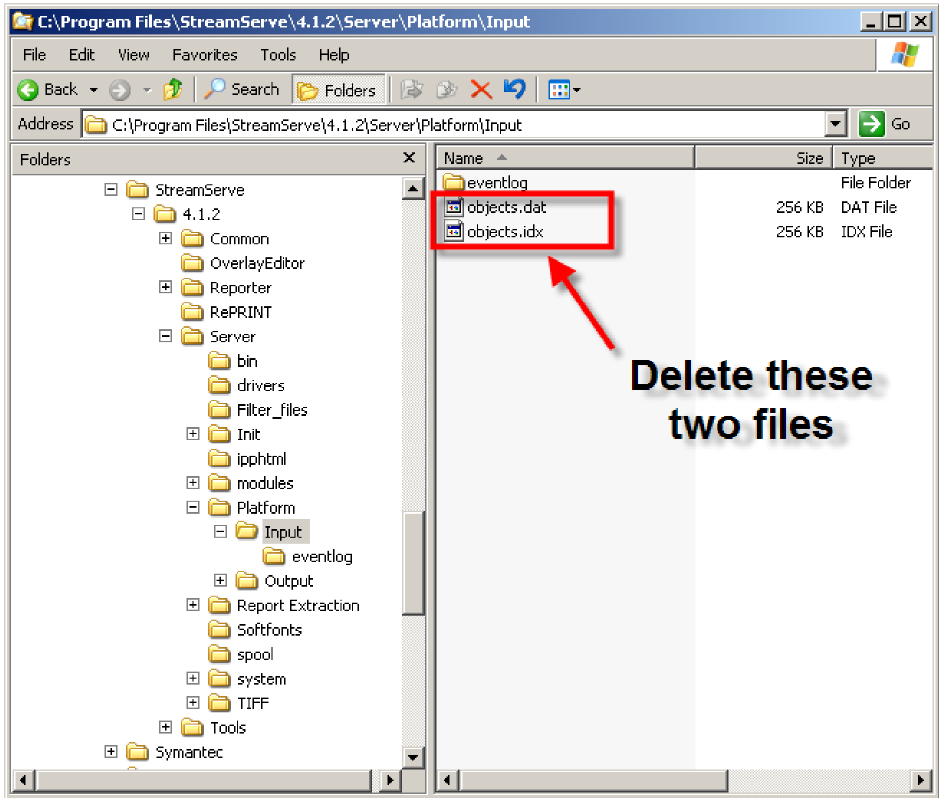
Occasionally, we have experienced a problem with the **StreamServe Focus Input** and the **StreamServe Focus Output** services not starting. If you try to manually start either of these services, you get an error message which says the service cannot be started. The error log indicates a "timestamp" conflict error.

To correct this error, there are two sets of **idx / dat** files that need to be deleted. Once these files are deleted, you should be able to successfully start the StreamServe Focus Input and Focus Output services. StreamServe will recreate these files with a current timestamp.

Note: the **StreamServe Repository Server** must be started before any of the other StreamServe services.

The next two steps describe how to locate and delete the **idx** and **dat** files.

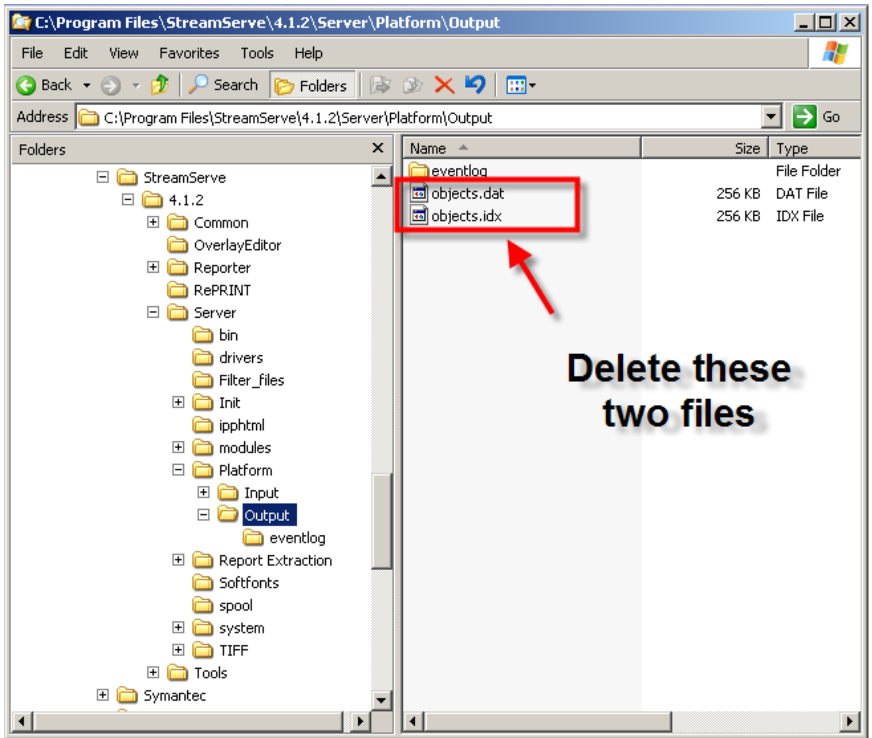
Step	Action
11	



- Navigate to C:\Program Files\StreamServe\4.1.2\Server\Platform\Input.
- In this directory you will find the objects.dat and objects.idx files. Delete both of these files.

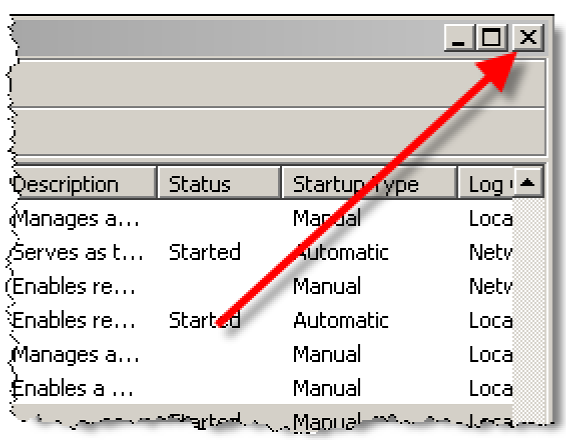
Step **Action**

12

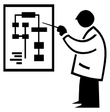


- Navigate to C:\Program Files\StreamServe\4.1.2\Server\Platform\Output.
- In this directory you will find the objects.dat and objects.idx files. Delete both of these files.
- Return to the Services menu. You should now be able to successfully start both the StreamServe Focus Input and the StreamServe Focus Output services.

13



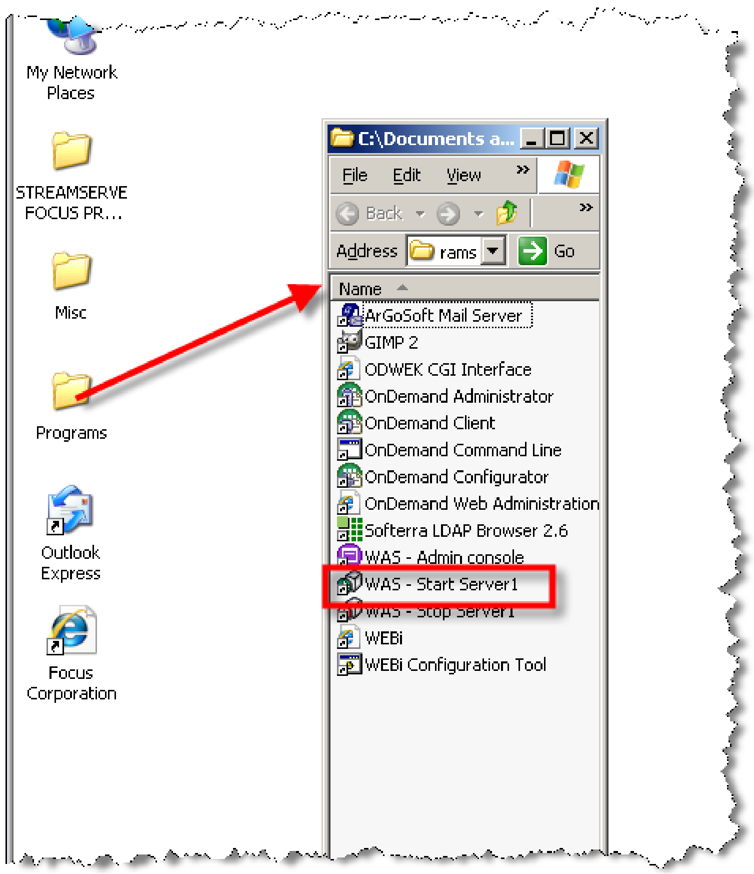
- Close the Services window by click on the **"X'** in the upper right corner of the window.



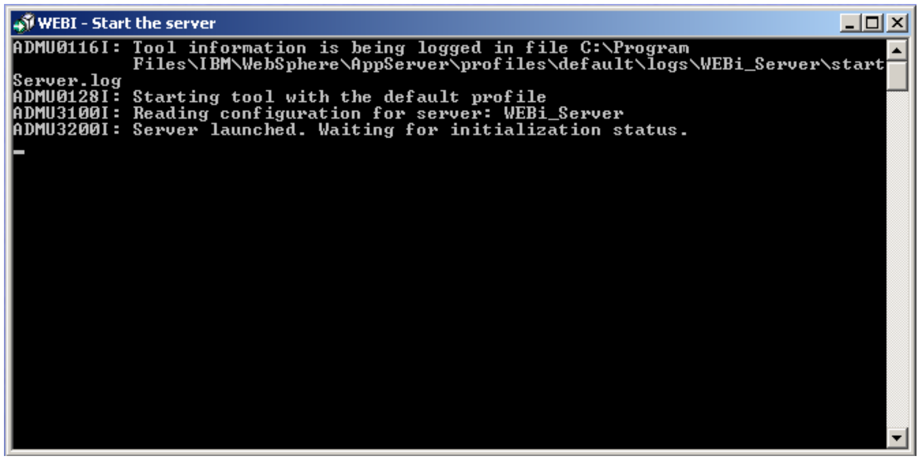
Step-by-Step – Prime the System

The following steps will improve the initial performance of the system for the students.

Step	Action
1	



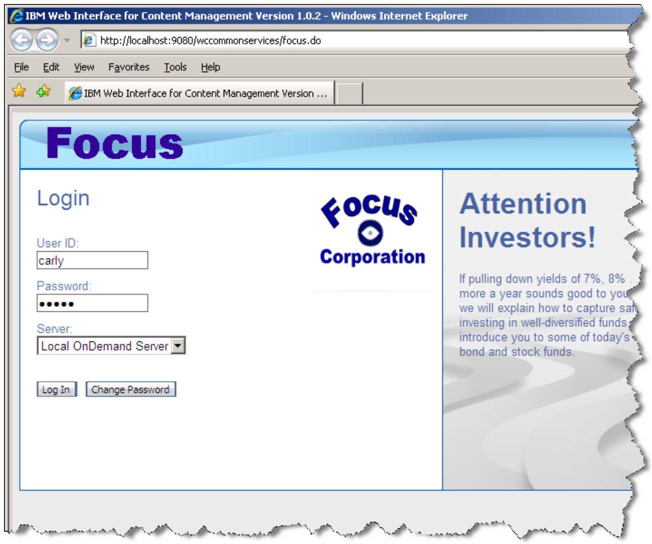
- On the left side of the desktop, double-click on the **Programs** folder to open it.
- In the **Programs** folder, double-click on **WAS - Start Server1**.

Step	Action
2	In this release, WEBi has been deployed to Server1. It will take about 60 – 90 seconds for the **Server1** to start. During that time you will see the following startup screen. This screen will disappear as soon as the server has started. 
3	Once the WEBI server has started, you need to verify that everything is running correctly by logging into WEBi and displaying a couple of documents.  • Double-click on the **Focus Corporation** icon on the left side of the desktop. This will start the WEBI client.

Step **Action**

4

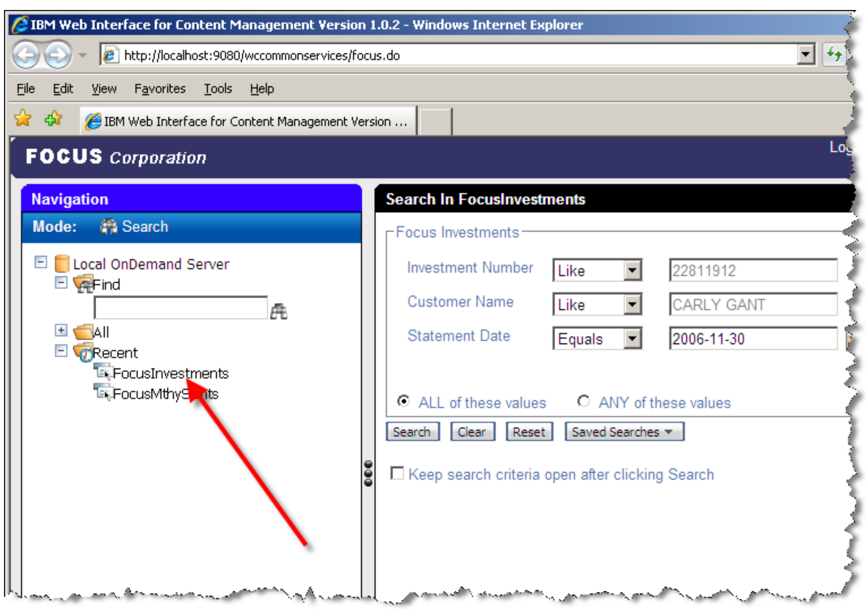
Initially, it will take about 20 seconds for the login screen to appear. From the point on it will only take 5 - 10 seconds.



- On the logon screen, enter **carly** for the User ID (should already be filled in) and **carly** for the Password.
- Click the **Log In** button.

Note: you may need to first click in the password field to make it active before you can type the password.

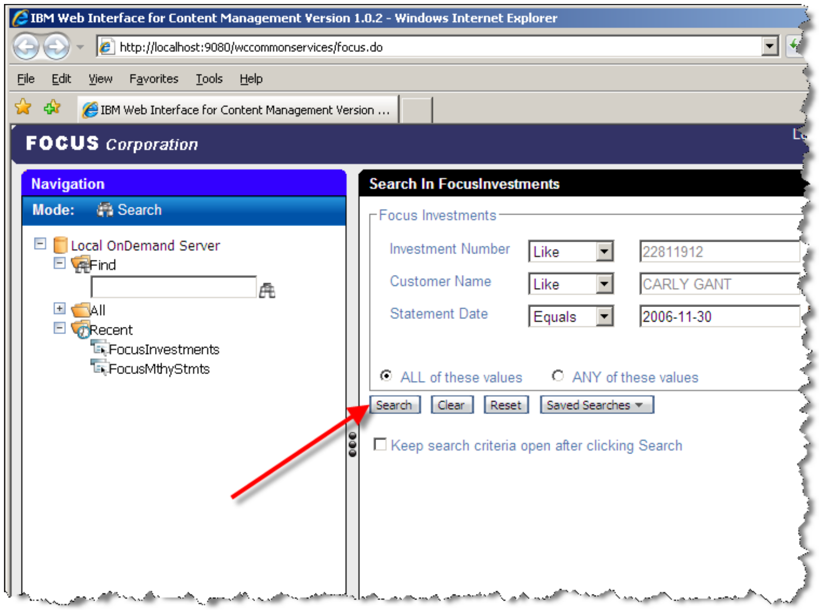
5



- Once you have logged in, single-click on **FocusInvestments** under **Recent Folders** in the **Navigation** pane.

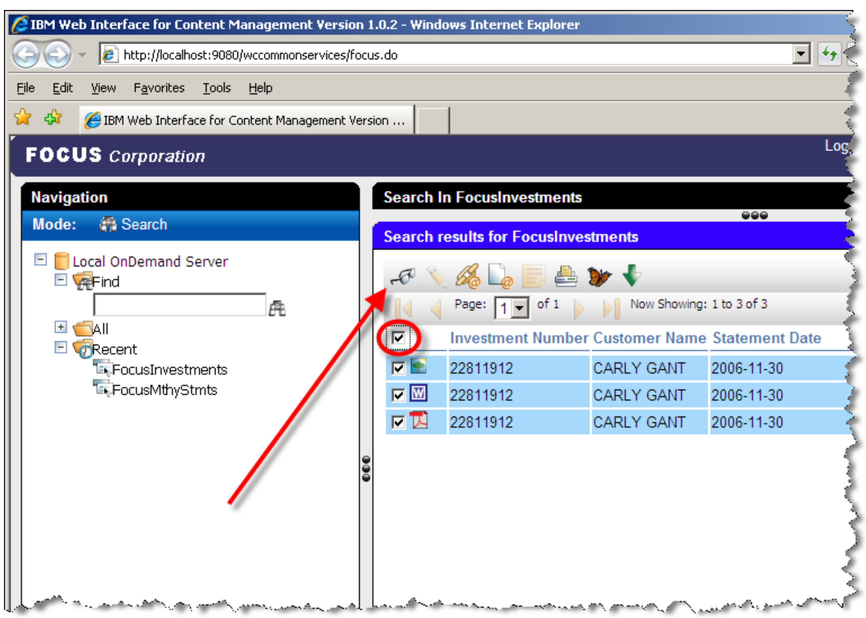
Step	Action

6



- Click on the **Search** button in the Search pane.

7

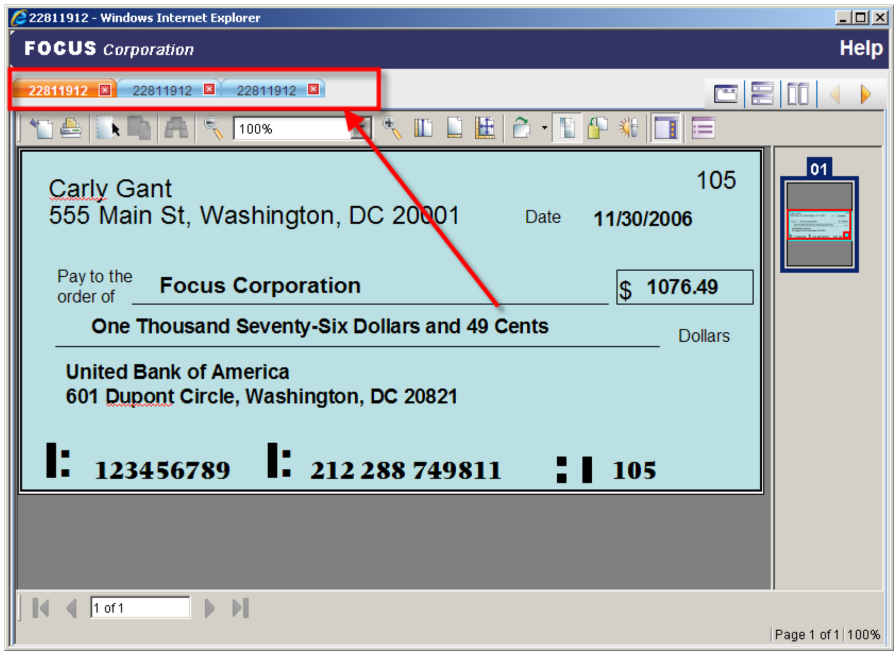


- In the **Search Results** pane, click on the checkbox at the top of the hit list. This will select all documents.
- Then click on the **View** icon in the toolbar (eyeglasses).

Step	Action

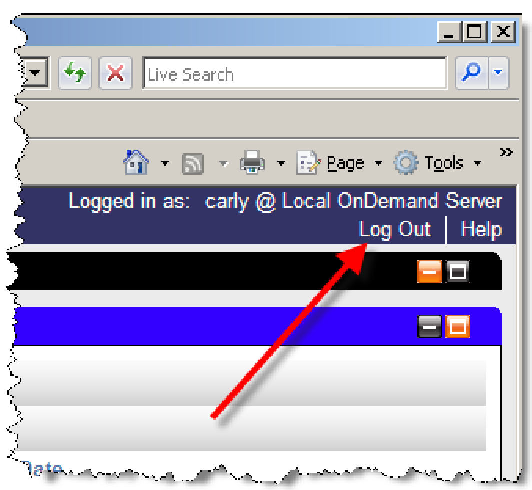
8

After a few seconds, you should see a viewer window with three tabs at the top. Each tab contains one of the documents that you selected. By default, the check image should be displayed, as shown below.

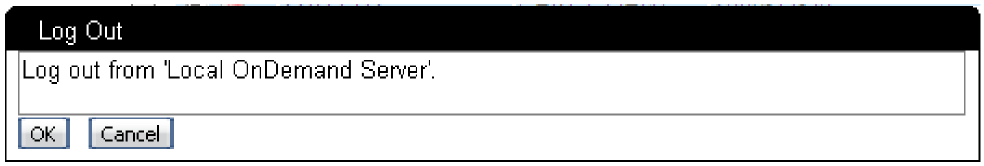
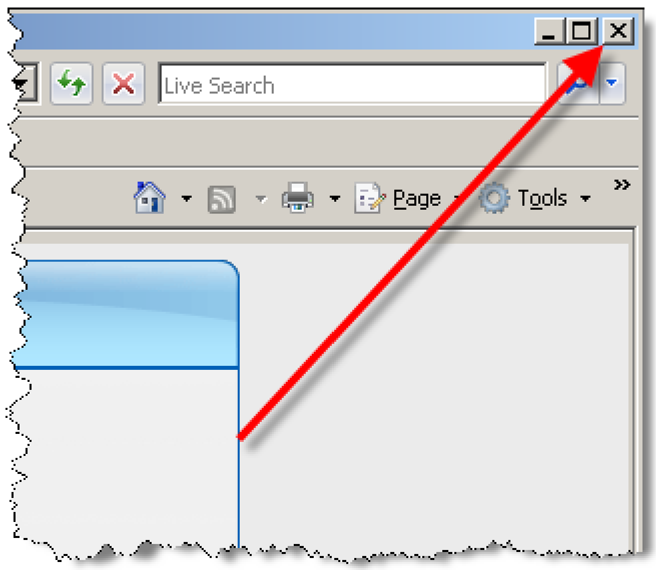


- Click on each tab to view the PDF file and the Microsoft Word document.
- Click on the "**X**" in the upper right corner of the viewer window to close it.

9



- In the WEBI client window, click on **Log Out** in the upper right corner of the window.

Step	Action
10	 • Click **OK** on the Log Out dialog.
11	 • Close the WEBI client by clicking on the “X” in the upper right corner of the browser window.
12	That’s it. Everything should be up and running and you should have a clean desktop for the student to use.

Chapter 4

OnDemand Report Wizard Demo

The following information should be used to demonstrate the Report Wizard. In the Presentation book, at the end of the ***Capture and Index*** chapter, there is a placeholder for a Report Wizard Demonstration. This demonstration should be done at that point.

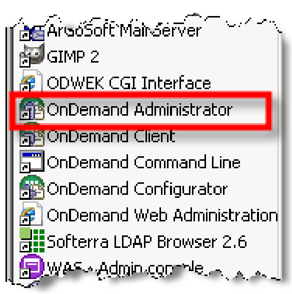
As the demonstrator you need to practice this demo several times before doing the PoT. You should be able to run through this entire demonstration in no more than 20 minutes. As you step through the demo you may want to explain what some of the parameters mean or you may gloss over them, depending on the level of the audience and the timing.

Also, remind the students that they will get a chance use the Report Wizard themselves in the optional lab at the end of the Lab Workbook. The optional lab contains additional information about the parameters that we do not take time to cover here.

Note: the way this demo has been written, you will define a floating trigger and you use a date that has a format that requires you to edit the Application and the Folder to modify the date format. If you are running short on time, you may want to bypass the floating trigger (and it's associated field) and select a different date, one which has the standard m/d/y format. There is one in the upper right corned of the report. If you do this, you may still want to remove leading and trailing blanks in the Customer Name.

Also, when the VMWare image was created, the sample file used for this demo contained the names of several copyrighted comic strip characters. We have since created a newer file without those names and have provided a newer sample file as an addendum to this PoT. The screenshots in this instructors guide were created using the newer file.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

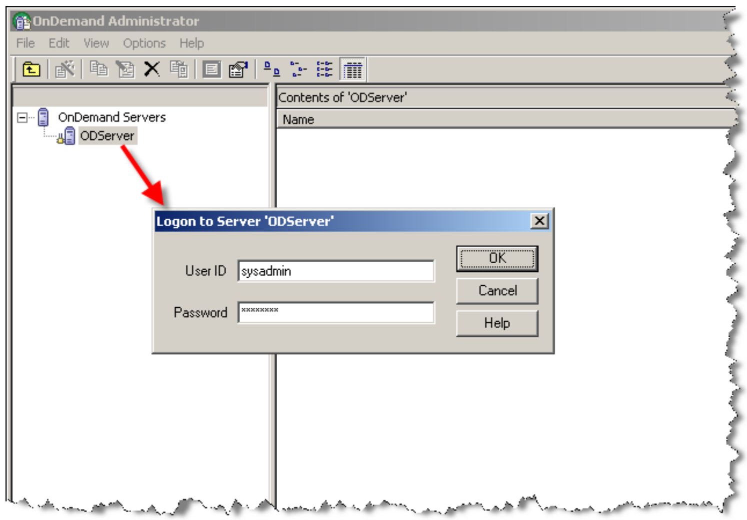


- In the Programs folder on the desktop, double-click on **OnDemand Administrator** to start the OnDemand Administrator.

</td></tr>
</table>

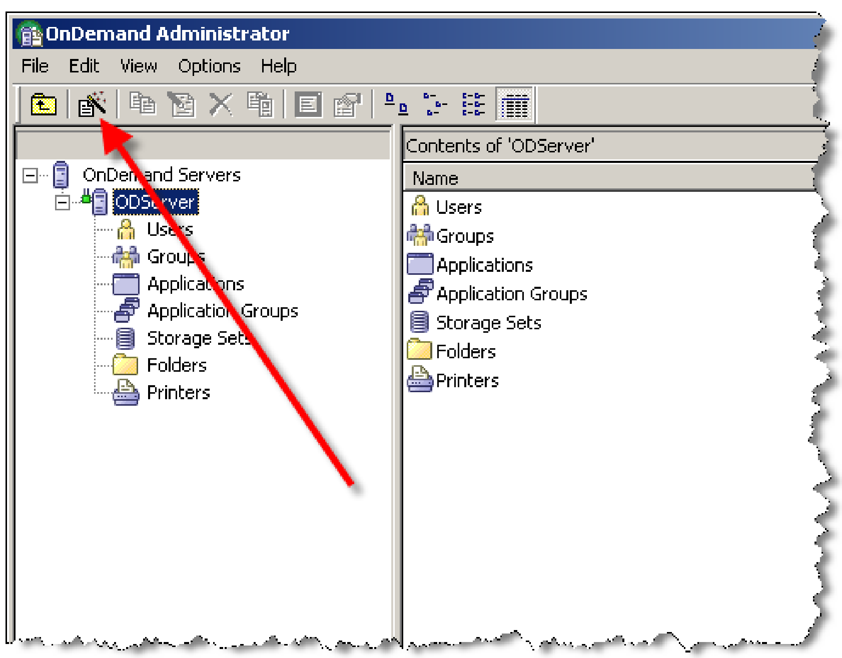
Step	Action

2



- In the OnDemand Administrator window, double-click on **ODServer** and log on with User ID: **sysadmin** and Password: **sysadmin**.

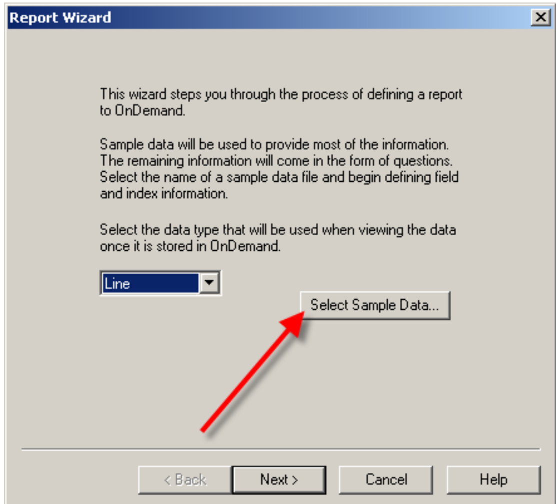
3



- To open the Report Wizard, click on the Report Wizard icon in the toolbar. This will be the second icon in from the left.

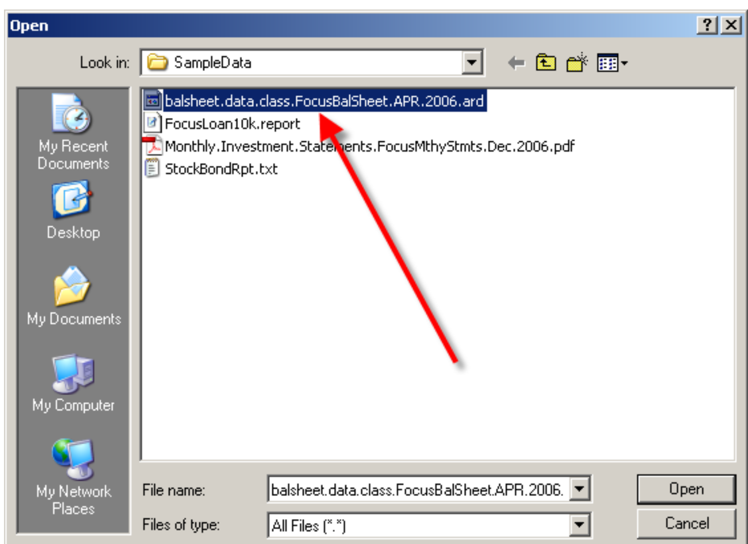
Step	Action

4



- Since we are not converting this line data report to AFP, leave the default data type as **Line**.
- Click on the **"Select Sample Data"** button.

5

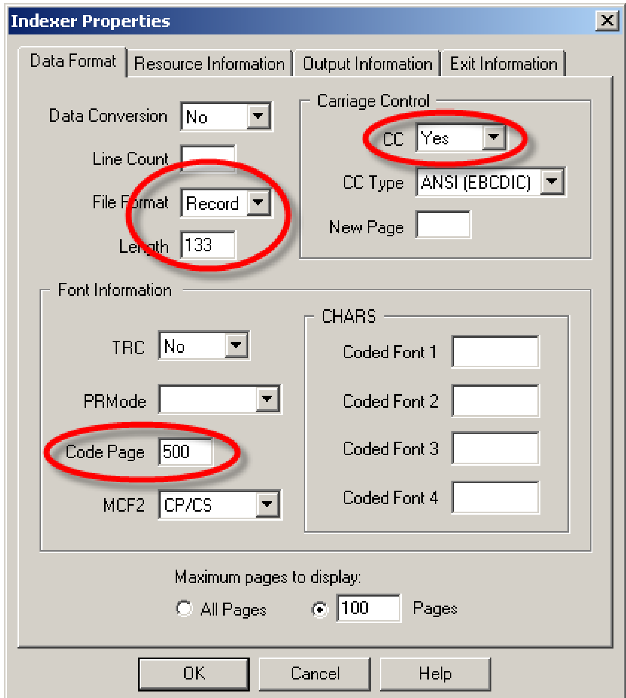


- Navigate to **C:\SampleData** and select: **balsheet.data.class.FocusBalSheet.APR.2006.ard**.

Note: explain that the naming convention used here is to allow OnDemand to automatically pick up the file and load it. The Application Group name, **FocusBalSheet**, is in the forth position of the file name.

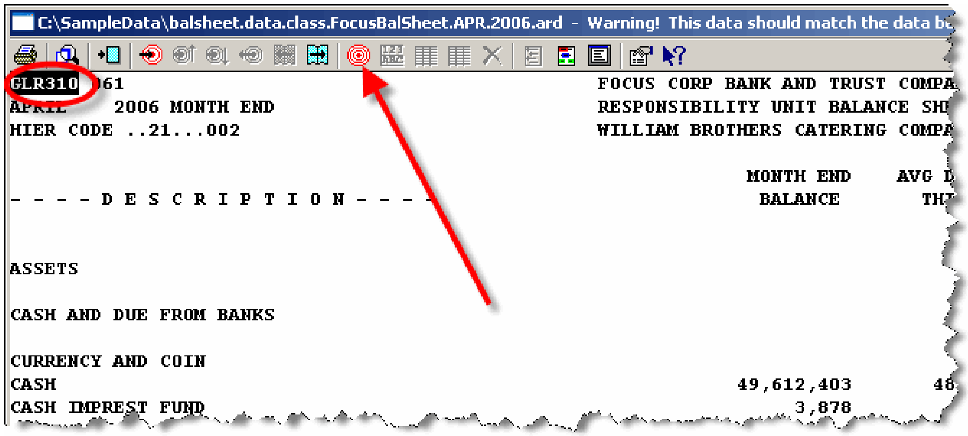
- Click the **Open** button.

Step	Action
6	Use the Index Properties dialog to define the characteristics of the input file.



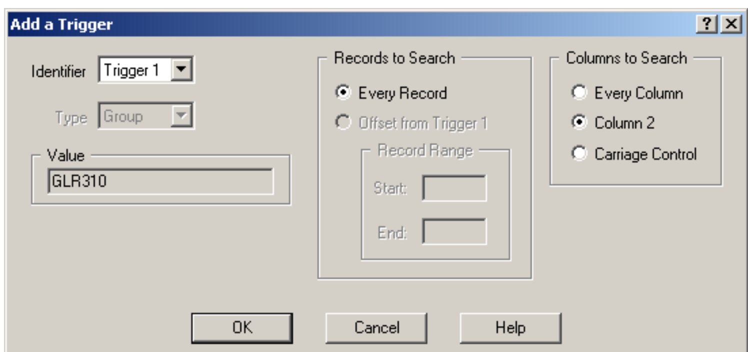
- The file format is **Record**, which is the default.
- Enter **133** for the record length.
- The code page needs to be set to EBCDIC, which is **500**. This is the default.
- The file contains Carriage Control characters. The default for carriage control is **Yes** and the CC type is **ANSI (EBCDIC).** Leave these values as-is.
- Click on the **OK** button to continue.

Step	Action
7	The first page of the report will be displayed. You will use this page to define the location of the triggers and Index fields.

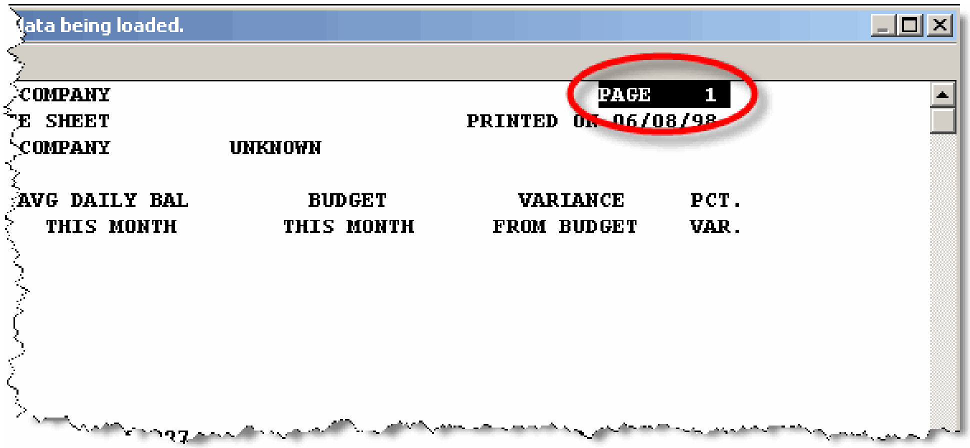
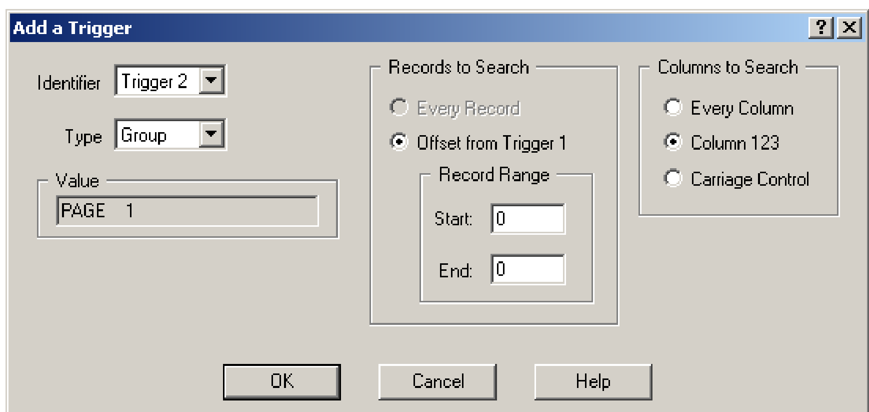


- Using the mouse, highlight the **GLR310** value in the upper left corner of the report, then click on the trigger icon in the toolbar.

Step	Action
8	

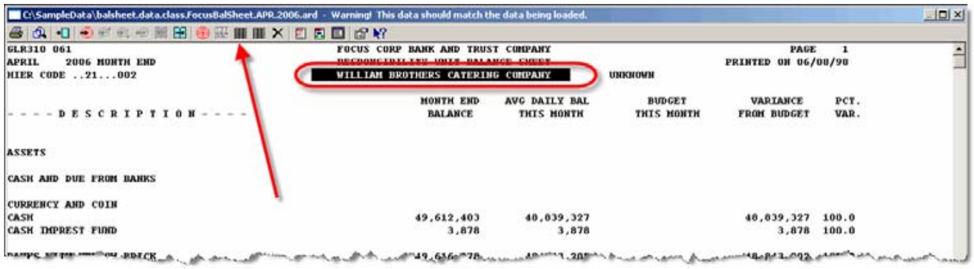


- The **Add a Trigger** dialog will appear. Notice that OnDemand will search every record for GLR310 beginning in column 2. Why column 2? Remember that this report contains carriage control in column 1.
- Click **OK** to define the trigger.

Step	Action
9	 • In the upper right corner of the report, highlight the **Page 1** value then click on the trigger icon in the toolbar. **Note:** you may want to highlight an extra blank space after the 1, just in case one of the reports contains a Page 11, or 100, etc.
10	 • Notice that this trigger, and all subsequent triggers will be offset from trigger 1. • Click **OK** to define the trigger.

Step	Action

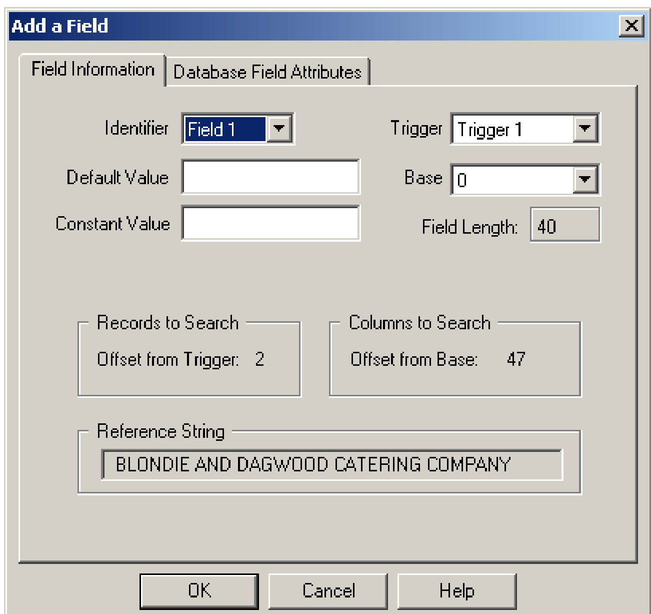
11 Next you will define the first of four fields.



- Highlight the customer name, which in this case is "**WILLIAM BROTHERS CATERING COMPANY**". Highlight a total of 40 characters with 4 spaces to the left and 4 spaces to the right of the customer name field, then click on the **Define a Field** icon in the toolbar.

---

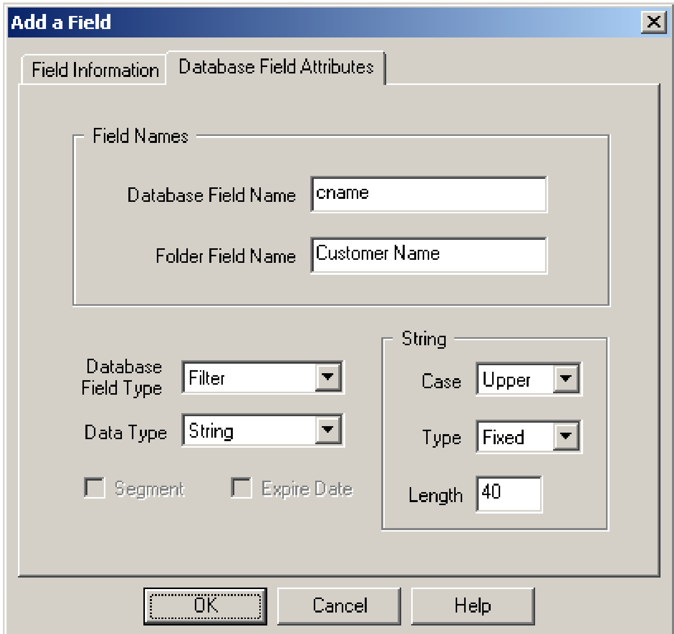
12 When using the Report Wizard, the **Add a Field** dialog contains two tabs, one for **Field Information** and one for **Database Field Attributes**. Generally, you do not need to change anything in the Field Information tab, as is the case here.



- Click on the **Database Field Attributes** tab.

Step **Action**

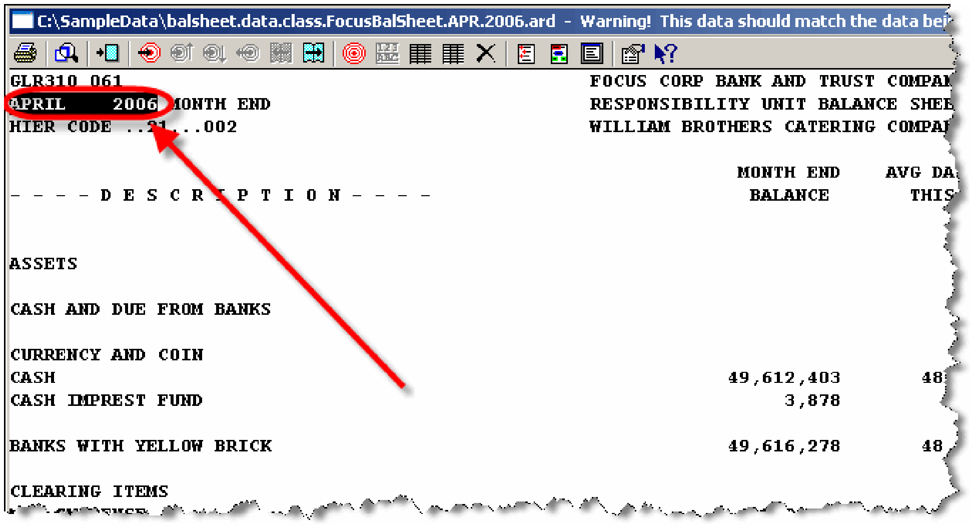
13



- Enter **cname** for the Database Field Name. This will be the actual field name in the database.
- For the Folder Field name, enter **Customer Name**. This will be the name that the end-user will see for this field, so it needs to be some value that makes sense to the user accessing this report.
- Accept **Filter** as the Database Field type and **Fixed** for the string type.
- Click the **OK** button to define this field.

Step	Action

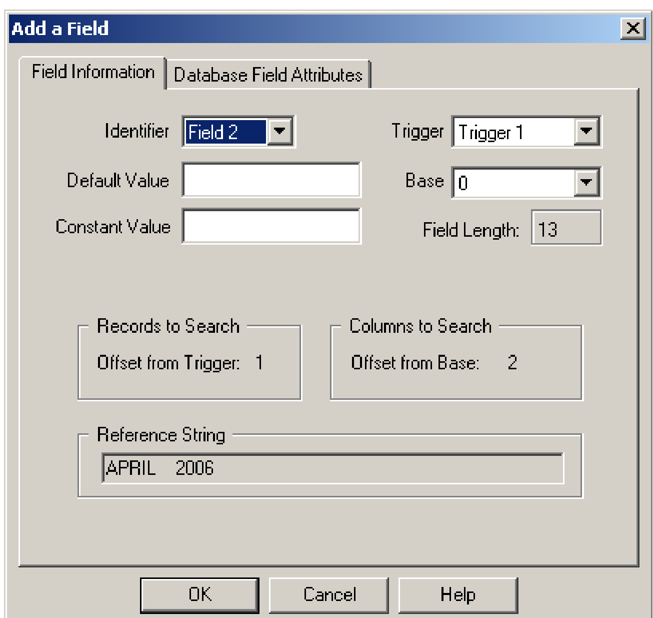
14 Next you will define the date field.



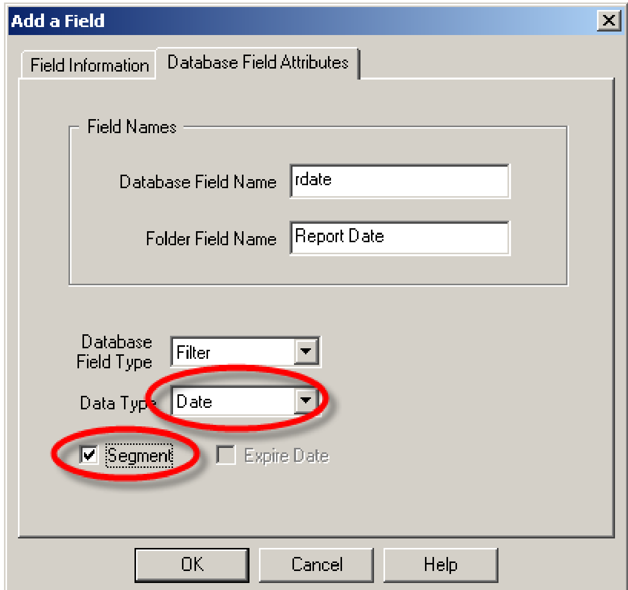
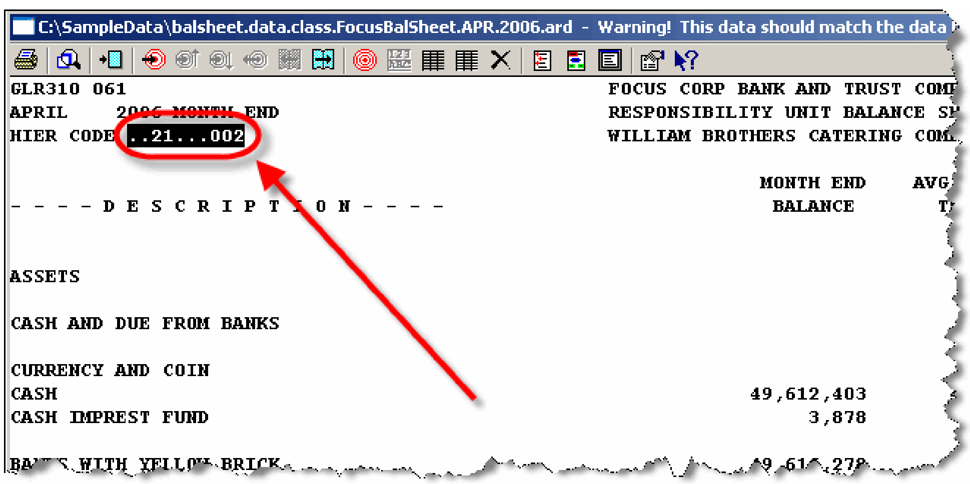
- In the upper left corner of the report, highlight "**Arpil 2006**", then click on the **Define a Field** icon in the toolbar.

Note: this is a non-standard date format since it does not contain a day value. Later, you will learn how to define this format in the Application profile.

15

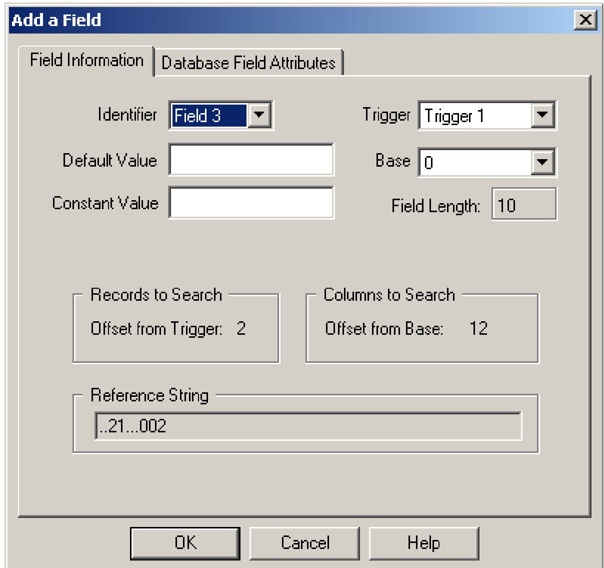


- Click on the **Database Field Attributes** tab.

Step	Action
16	 • Enter **rdate** for the Database Field Name and **Report Date** for the Folder Field Name. Leave **Filter** as the Database Field Type but change Data Type to **Date**. Since we want this field to be the segment date, check the Segment box. • Click **OK** to define this field.
17	The third field you want to define is the Hierarchy Code field.  • In the upper left corner of the report, highlight the hierarchy code. Make sure you include all 10 characters. • Click on the **Add a Field** icon in the toolbar.

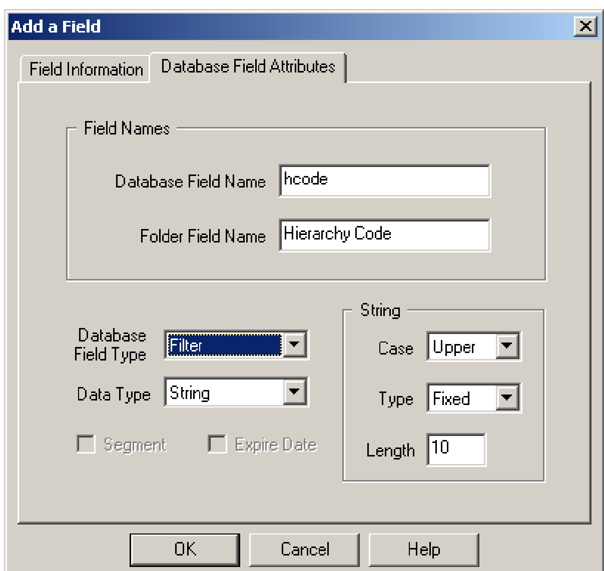
Step	Action

18



- Click on the **Database Field Attributes** tab.

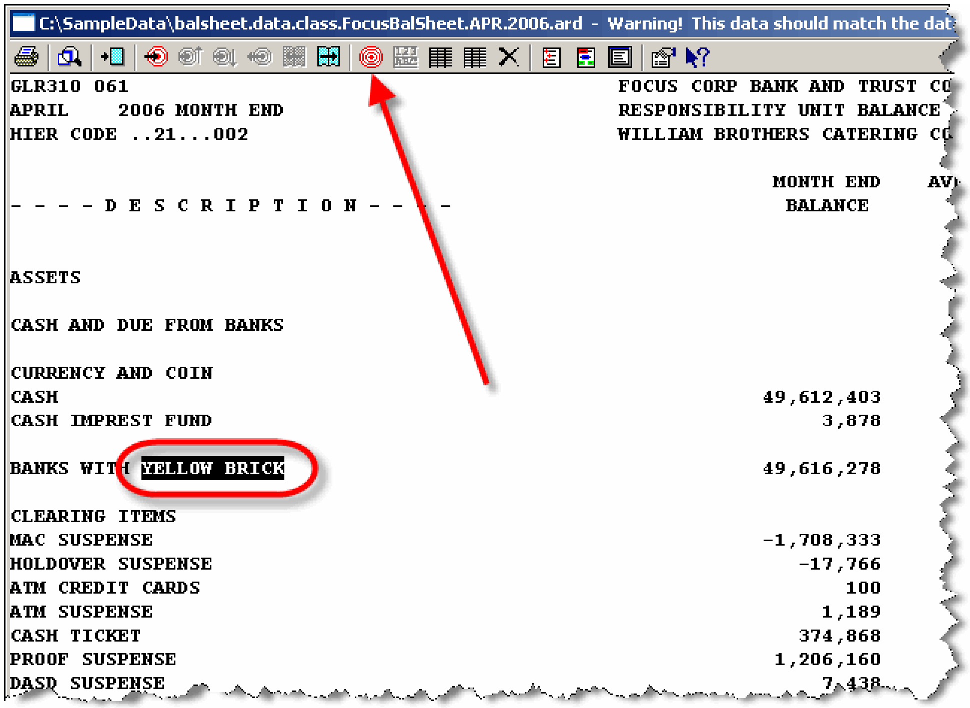
19



- Enter **hcode** for the Database Field Name and **Hierarchy Code** for the Folder Field Name. Leave **Filter** as the Database Field Type and **String** as the Data Type. The remaining default values were automatically defined by the wizard based on the data you selected for this field.
- Click **OK** to define this field.

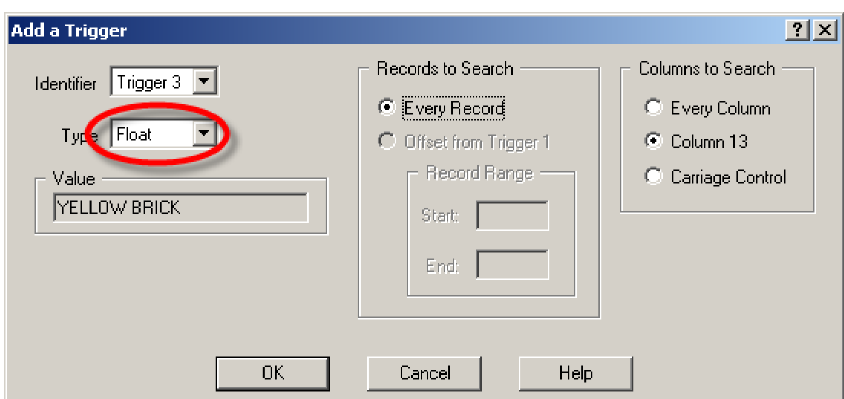
Step **Action**

20 The last field you need to define is the month end balance for Yellow Brick bank. But, this value is not on every page. This implies that you need to base this field on a floating trigger. Looking at the report, you see that "**Banks with Yellow Brick"** precedes the month end balance. You do not need to define the entire string, just a unique string that can be used to locate the month end balance.



- Highlight the words **Yellow Brick,** and click on the trigger icon in the toolbar.

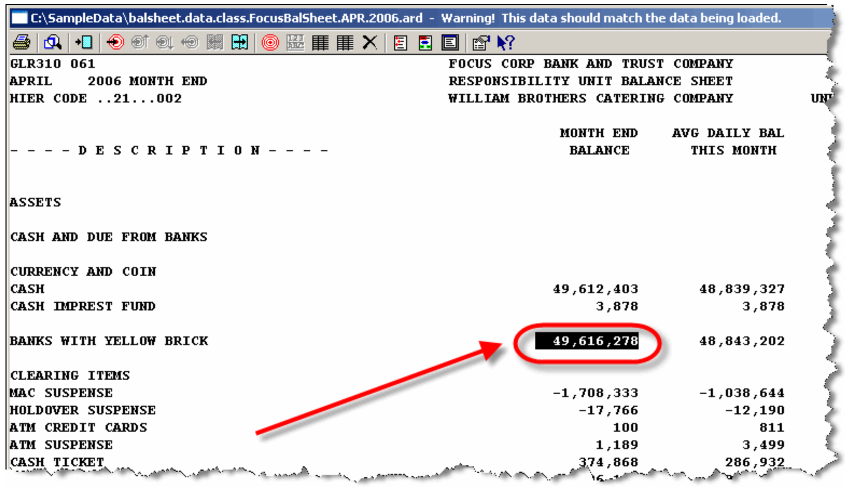
21



- For type, select **Float**. All other values are satisfactory, so click on **OK** to define the trigger. Notice the identifier is Trigger 3. When you define the month end balance field you will need to base the field on this trigger.

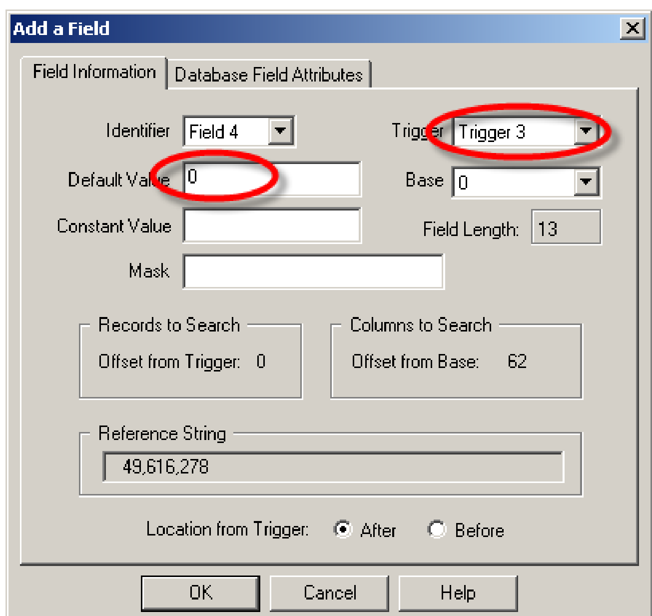
Step	Action

22

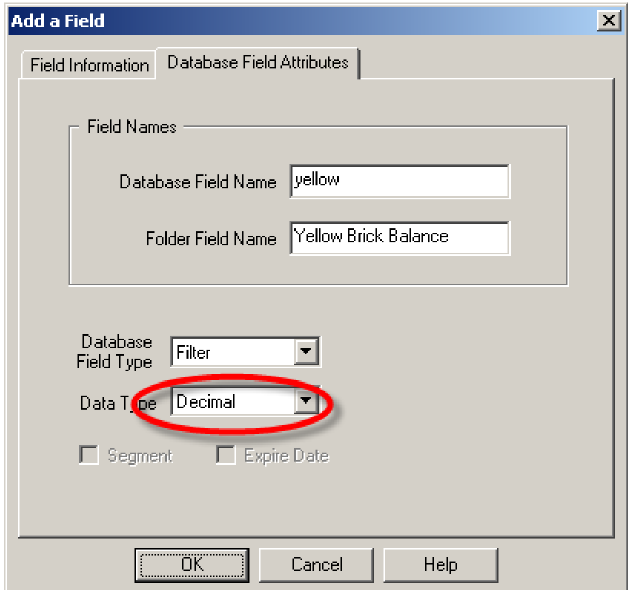
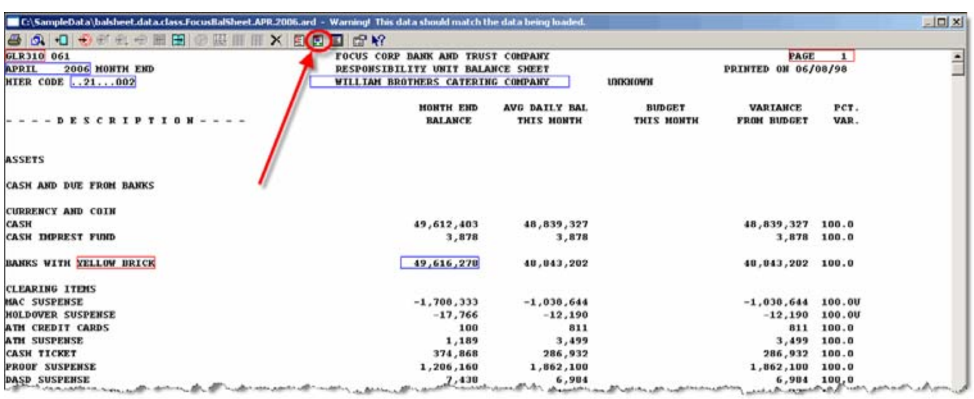


- Highlight the month end balance. You may want to select a few blank characters in front of the balance just in case there are larger numbers in the report.
- Click on the **Define a Field** icon in the toolbar.

23

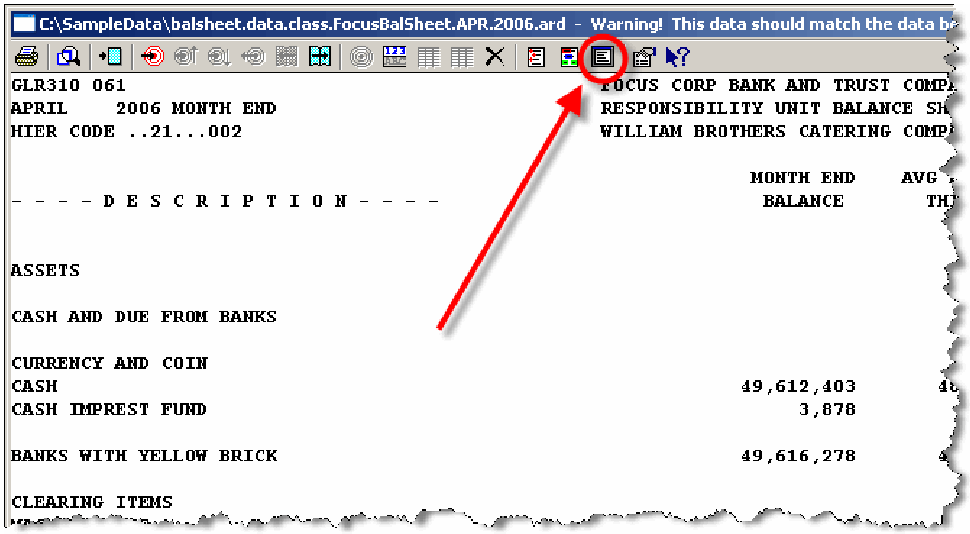


- On the Field Information tab, select **Trigger 3** for the Trigger field. This will tell OnDemand to extract the month end balance only when it finds trigger 3, which is "**Yellow Brick**". Additionally, enter "**0**" as the default value for this field.
- Click on the **Database Field Attribute** tab.

Step	Action
24	 • Enter **yellow** for Database Field Name and **Yellow Brick Balance** for the Folder Field Name. Accept the default of **filter** for Database Field Type. • For Data type, select **Decimal**. • Click on the **OK** button to define the field.
25	You have now defined all the triggers and fields.  • To verify their locations, click on the **Toggle between Display and Add Parameters** icon in the toolbar. This is the forth icon in from the right. You will see the triggers outlined in red and the fields **highlighted** in blue. **Note:** you may want to page down to the beginning of the next document to show how OnDemand only selected index values from page 1. • Click again on the **Toggle between Display and Add Parameters** icon to turn off the display of triggers and fields.

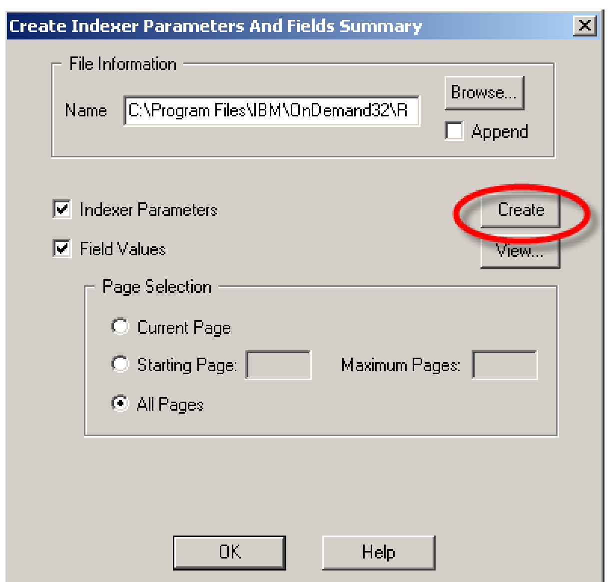
Step **Action**

26 There is another way to view the field values that will be extracted by OnDemand for this report.



- Click on the **Create Indexer Parameters and Fields Summary** icon in the toolbar. This is the third icon from the right.

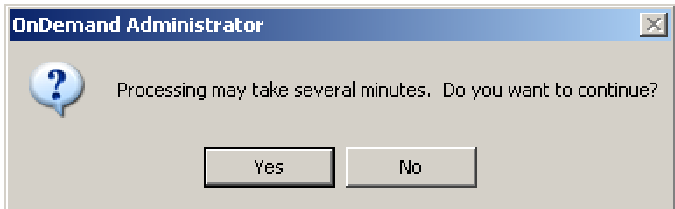
27



- On the Summary dialog, check both the **Index Parameters** and **Field Values** checkboxes. Also, select **All Pages** in the Page Selection section.
- Click on the **Create** button.

Step **Action**

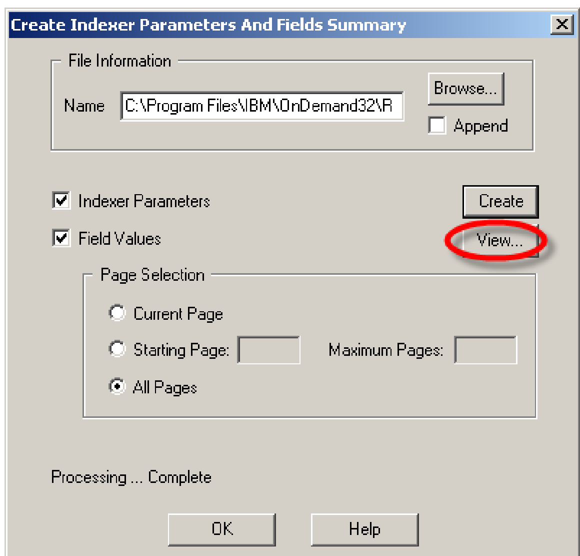
28



- Click **Yes** in the "**Do you want to Continue**" window.

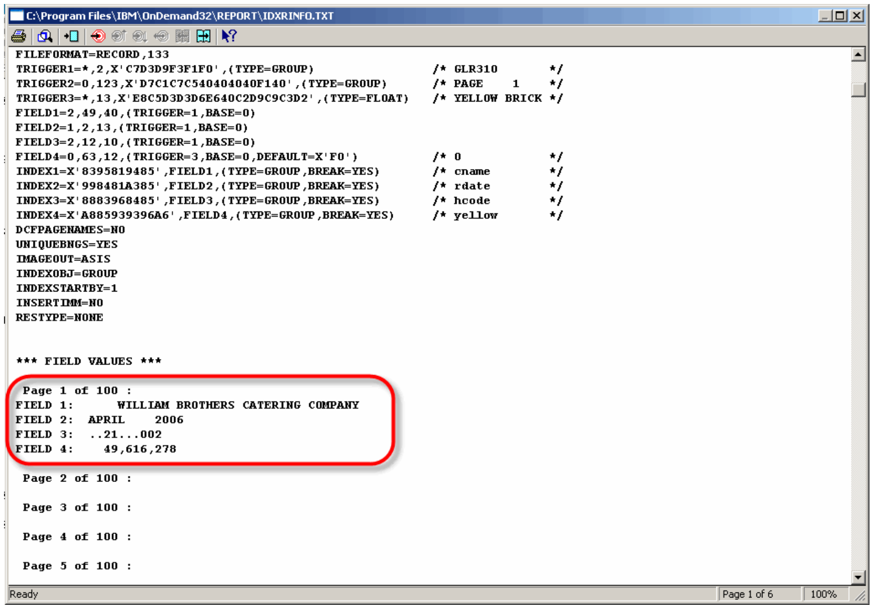
29

After a few seconds, a report will be created in the location specified in the File Information section.



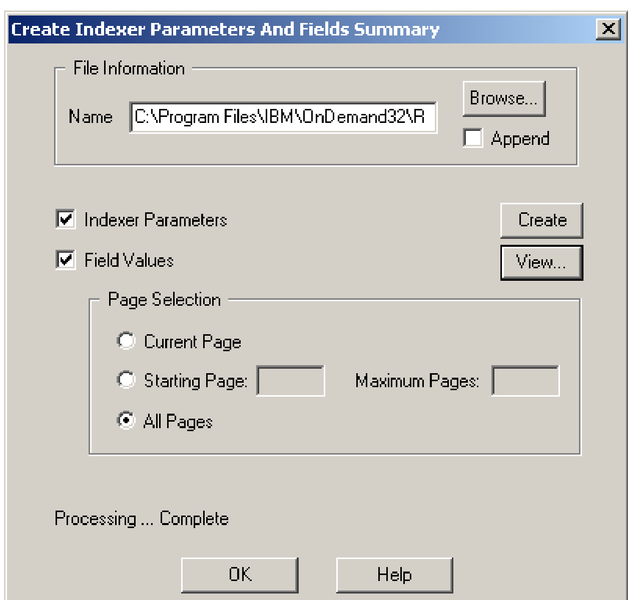
- Click on the **View** button to look at the Summary report.

Step	Action
30	The first section of the report documents the indexing parameters that were created by OnDemand for this report. When you page down you will see a listing of all the field values extracted by OnDemand. This is a good way to make sure that OnDemand is extracting the values that you intended to extract.



- Close the report Summary when you have finished reviewing the index values by clicking on the "**X**" in the upper left corner of the window.

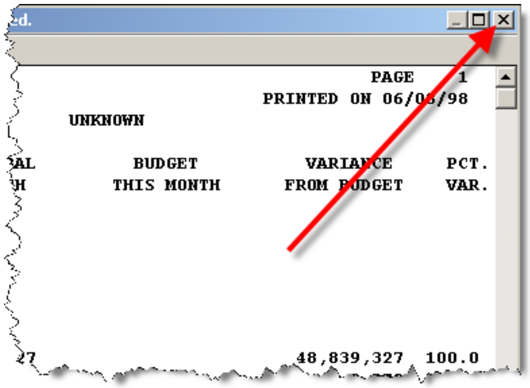
31



- Click the **OK** button to close the Indexer Parameters screen.

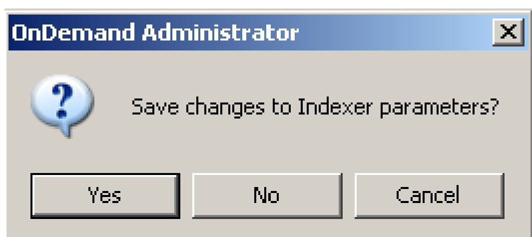
Step **Action**

32



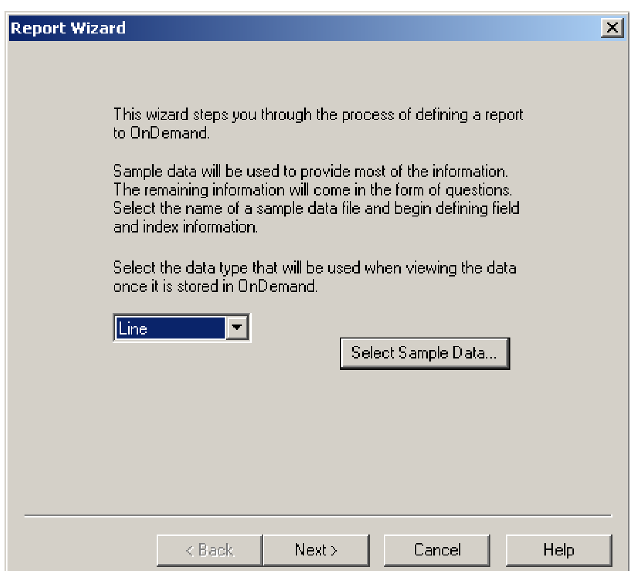
- Click the "**X**" in the upper left corner of the graphical indexer screen to close the indexer.

33



- Click on the **Yes** button to save your changes.

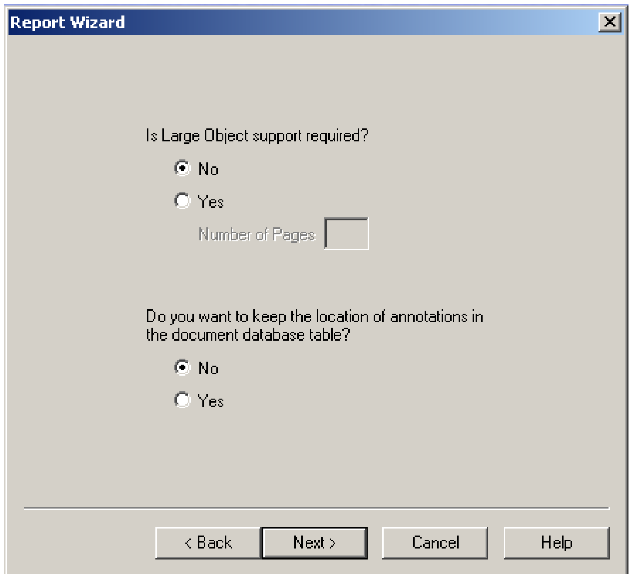
34 Basically you are going to accept the default values for the remainder of the Wizard screens.



- Click on the **Next** button to continue.

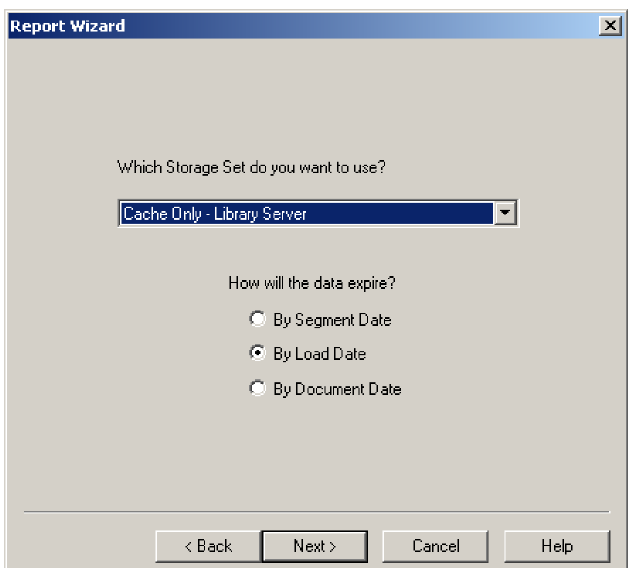
Step	Action

35



- Select **Next** on this screen to accept the default values of **No** for Large Objects and **No** for keeping annotations in the database.

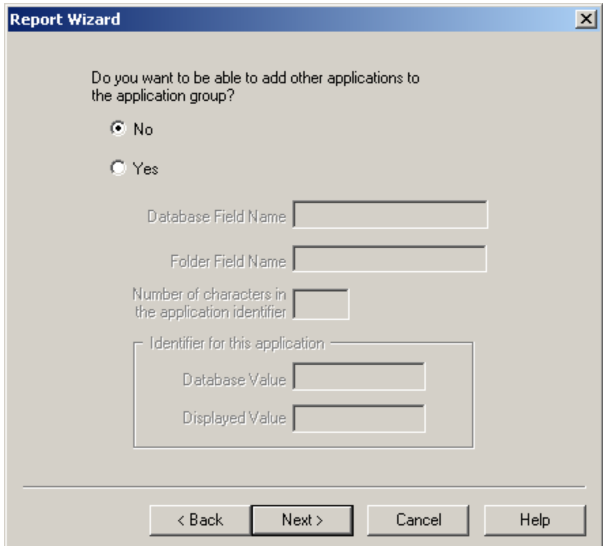
36



- Select **Next** on this screen to accept the default storage set and expiration type.

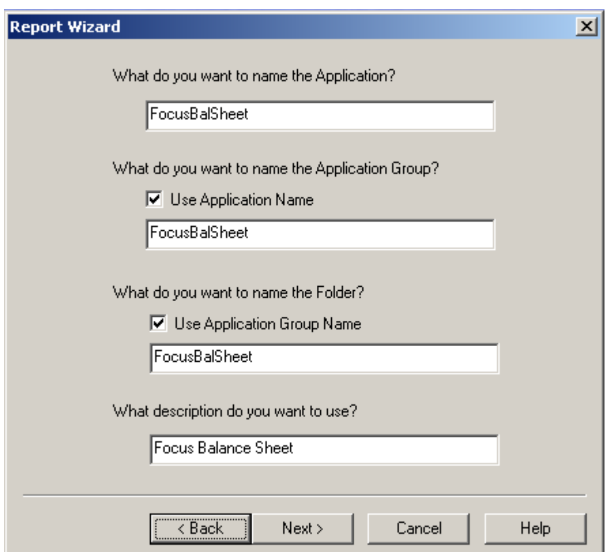
Step	Action

37



- Click **Next** on the screen that asks if you want to add additional applications to the application group. For this exercise we will not have multiple applications in this application group.

38



- On the screen where you enter the name for your Application, type **FocusBalSheet** in the first field. **Note:** this name is case sensitive! Also, notice that, by default, the wizard will enter the same name for the application group and the folder. Also, enter a description for report. In this case we entered Focus Balance Sheet. **Note:** you may want to point out that this name must match the forth position of the file name that OnDemand will load.
- Click **Next**.

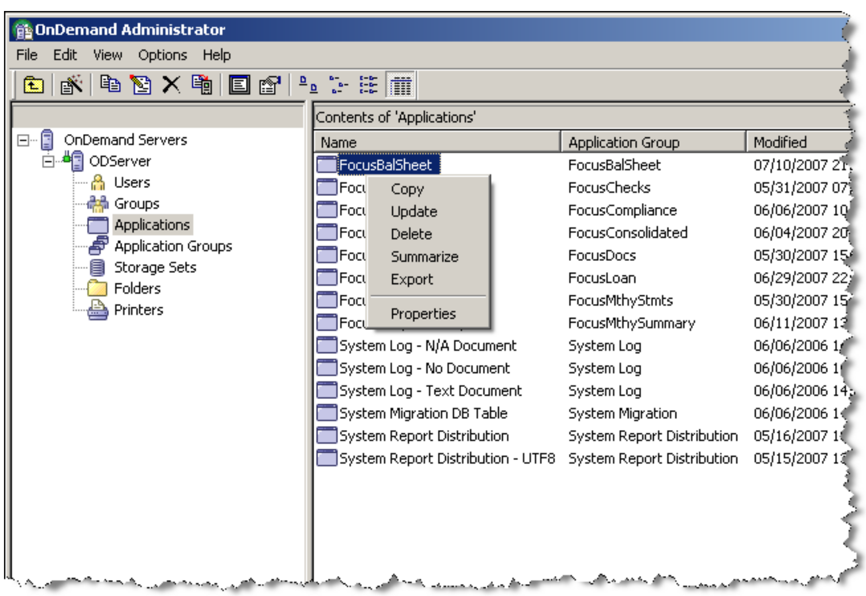
Step	Action

39

- Finally, on the last screen, select Finish to create the report profiles.

40

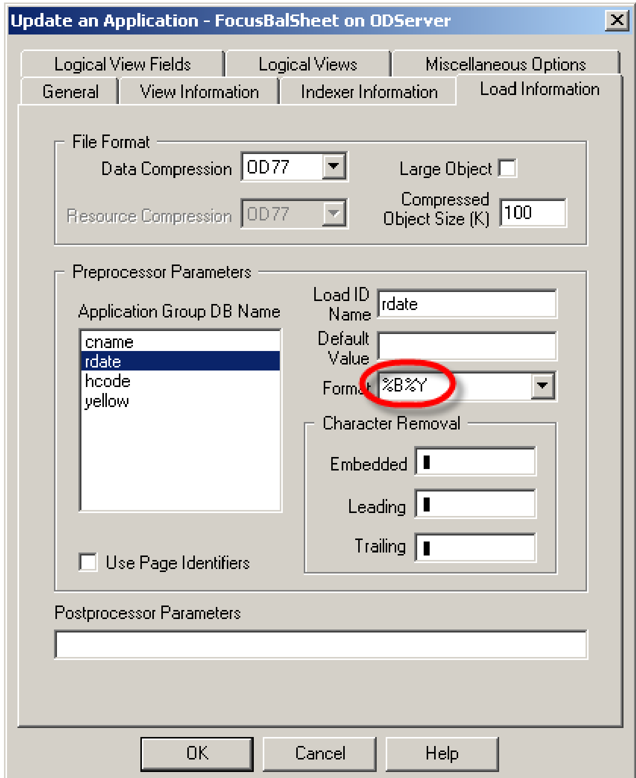
After a few seconds you will be returned to the main Administrator screen. At this point, the wizard has created an Application Group, an Application, and a Folder for **FocusBalSheet**. But there are a few changes that need to be made to the report definitions before you can load the data.



- In the Administrator screen, select **Applications** in the left panel, then right click on **FocusBalSheet** in the right panel
- Select **Update**.

Step	Action

41



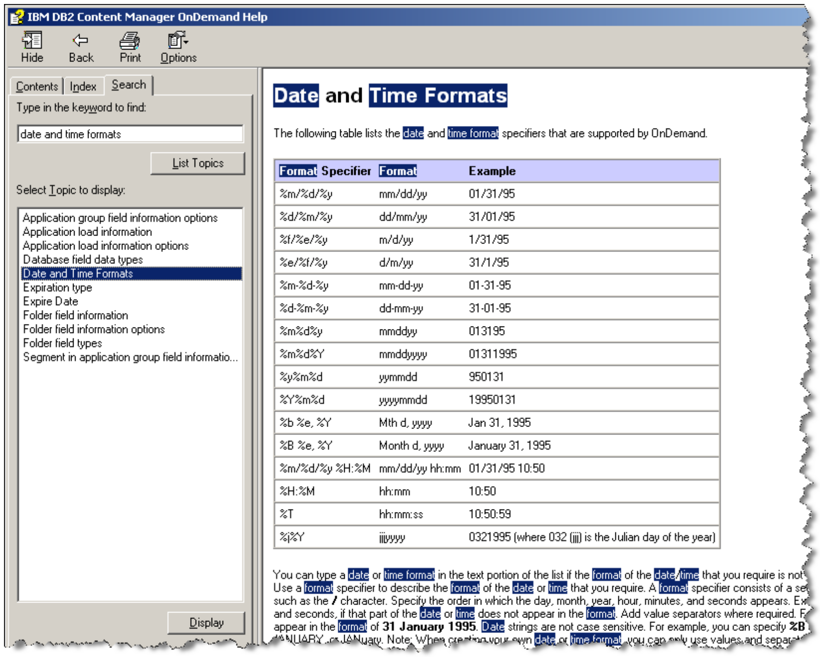
- Click on the **Load Information** tab.
- Click on **rdate** in the Application Group DB Name section.
- Enter **%B%Y** in the **Format** field.

Note: If you remember from the sample data, the date is in the format "**April 2006**". So you need to change the date format to accommodate this type of date.

To find the allowable formatting parameters for date:

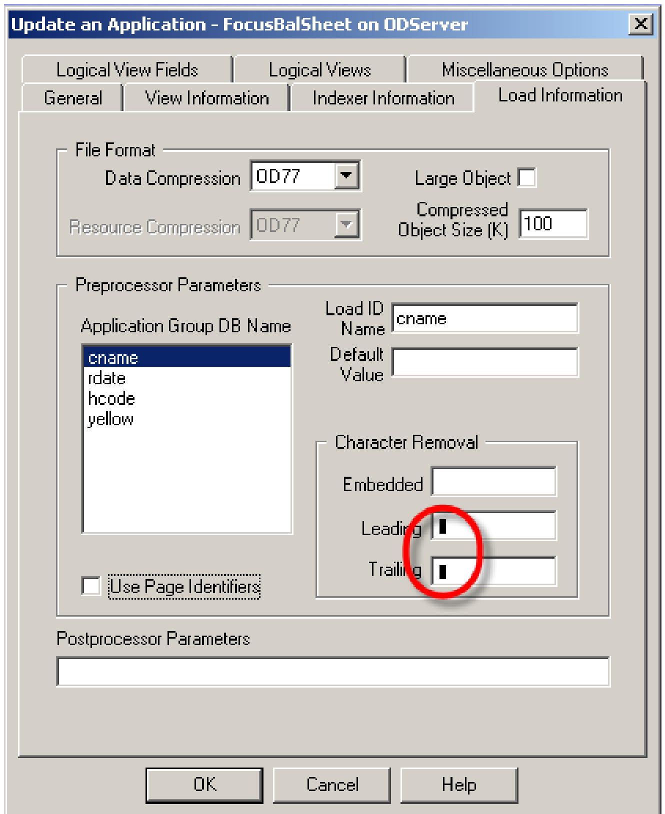
- Click on the **Help** button.
- Search for "***Date and time formats***".

Step	Action
42	This is the screen that shows the allowable date formats.



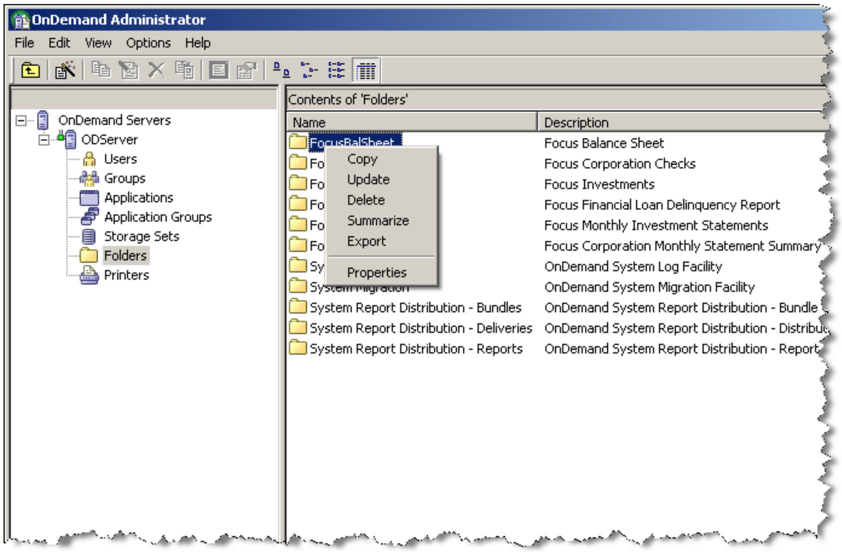
- Close the help screen.

Step	Action
43	



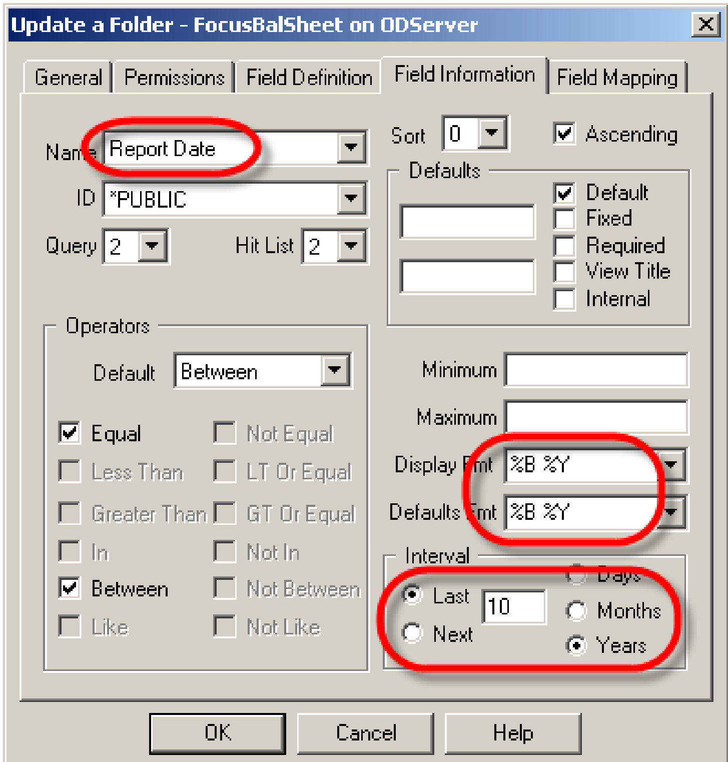
- Back on the Load Information tab, click on **cname** in the Application Group DB Name section. Remove leading and trailing blanks from this field, but do not remove embedded blanks. If you remember from the sample data, you selected several blanks at the beginning and the end of this field to accommodate longer names. Here we will remove those spaces.
- Click **OK** to save and close the Application profile.

Step	Action
44	There is also a change you need to make to the Folder profile.



- In the Administrator screen, select **Folders** in the left panel, then right click on **FocusBalSheet** in the right panel.
- Select **Update**.

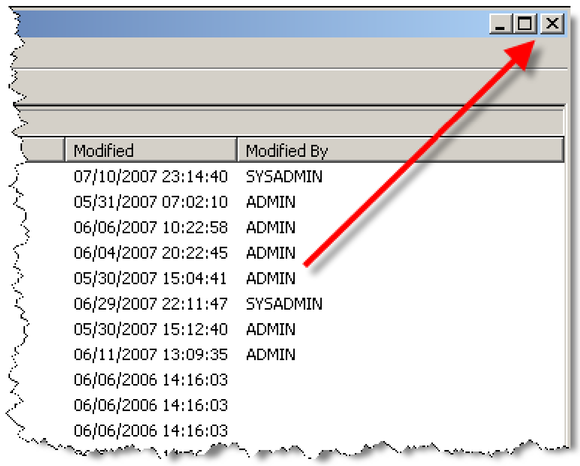
Step	Action
45	



- Click the **Field information** tab.
- Select **Report Date** in the Name field.
- In the **Display Fmt** and **Defaults Fmt** fields enter **"%B %Y"** for both fields. This is the same format we used for the date in the Application profile but here we entered a space between %B and %Y. This will insert a space between the month and year when the date is displayed.
- In the Interval section select **Last 10 Years** as the default interval. Make sure that the **Default** checkbox in the **Defaults** section toward the top of the screen is selected as well. Defined in this way, the folder will provide a default beginning date (current date minus 10 years) a default ending date (current date).
- Click **OK** to save and close the Folder profile.

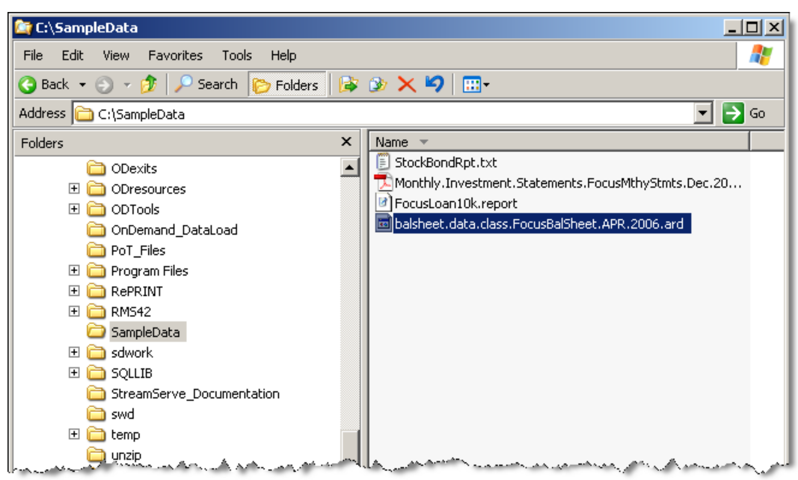
Step	Action

46



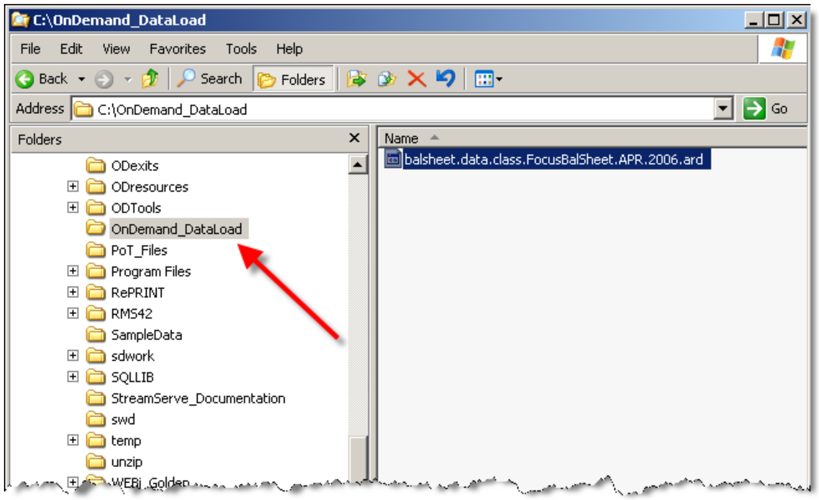
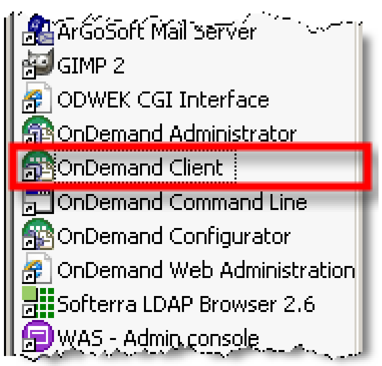
- Close the Administrator by clicking on the "**X**" in the upper right corner of the window.

47



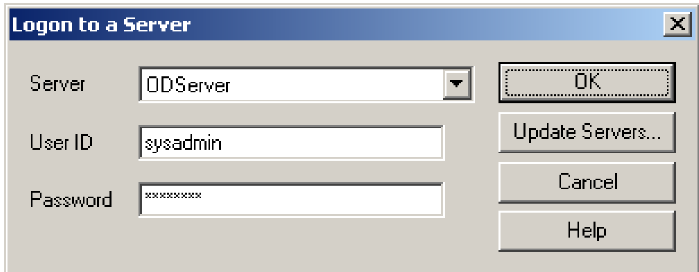
- Open Windows Explorer and navigate to **C:\SampleData.**
- Right-click and select **Copy** for the File: **balsheet.data.class.FocusBalSheet.APR.2006.ard.**

Note that the forth position of this file name is the exact name that you used in the Wizard when you named the Application Group, the Application, and the Folder profiles. This is case sensitive!

Step	Action
48	 • Select the **OnDemand_DataLoad** directory, • Right-click and select **Paste** to copy the file into this directory. OnDemand has been configured to monitor the **OnDemand_DataLoad** directory. When a file is copied into this directory, the OnDemand Data Load service will automatically load the data. After a few seconds, this file will disappear from this directory.
49	 • In the **Program** folder on the Desktop, double-click on **OnDemand Client** to open the OnDemand Windows Client.

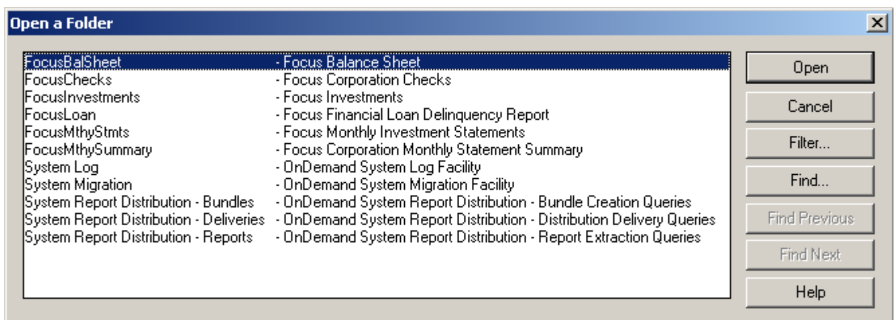
Step	Action

50



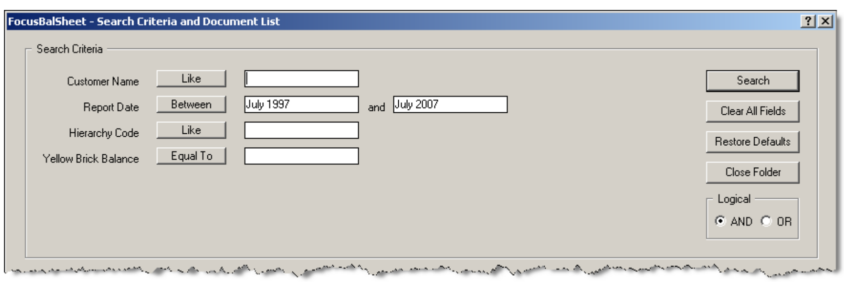
- Logon with User ID: sysadmin, and Password: sysadmin.

51

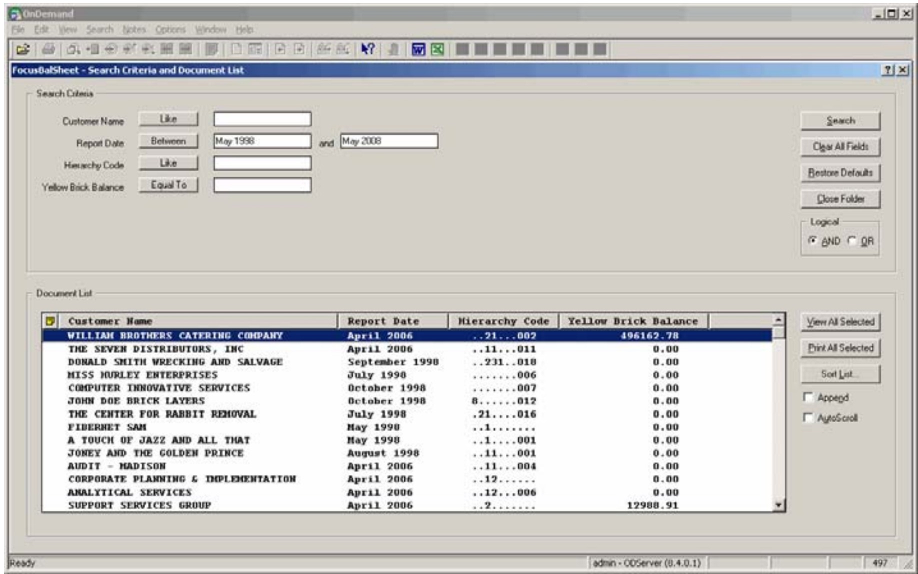
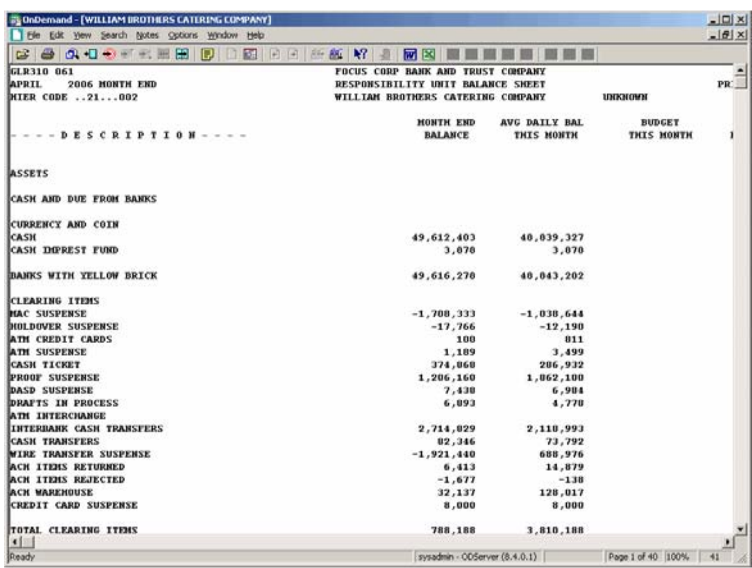


- Select the **FocusBalSheet** folder and click the **Open** button.

52



- In the **Search Options** section, notice the default values for **Report Date**.
- Click on the **Search** Button.

Step	Action
53	 • In the **Document list** section, notice that multiple documents were loaded from this datastream. • Also point out that the yellow brick balance was not found on every document. • Double-click on the first document to display it.
54	 • After reviewing the document, close the OnDemand Windows Client. This is the end of the Report Wizard demonstration.

Chapter 5

Image Reset

By the completion of the PoT, new applications and documents have been added to OnDemand. Also, several emails will be setting in Outlook Express. Therefore, if you need to return the PoT image to its initial state, you will need to remove these documents from OnDemand and erase all the emails from Outlook Express. You can use this section to reset the image, but typically you would never need to do this. If you need to reset the image, since it is a VMWare image, simply re-copy the image.

Chapter Summary

Chapter	**Action Performed**
1	N/A - Reading
2	N/A - Reading
3	Carly sends an email to John
4	Email sent to Carly; Document added to Focusconslidated;
5	XLS file saved to the desktop
6	December statement added to FocusMthyStmts; Email sent to Carly Email sent to Sysadmin Sample report loaded to FocusLoan
7	N/A – Logical Views
8	Two emails sent to Steve
9	FocusStockBond is created and loaded

TO RESET

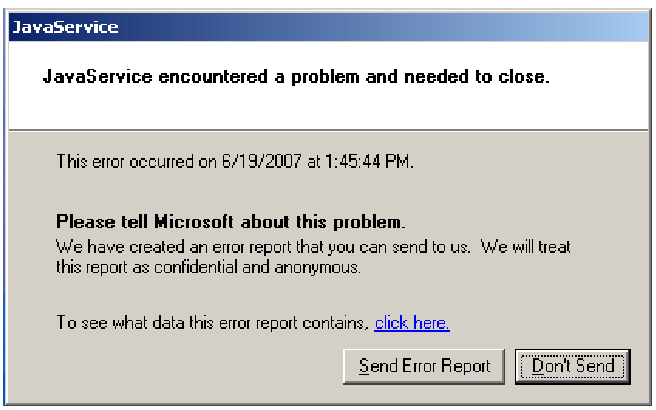
1	Open Outlook Express and erase all emails for: - John - Carly - Steve - Sysadmin
2	Unload the following reports from OnDemand: - **FocusMthyStmts:** December statement - **FocusConsolidated**: (there should be no documents in this folder) - **FocusLoan**: (there should be no documents in this folder) - **FocusStockBond:** the report should be unloaded and the Application group, Application, and Folder profile should be deleted, since these are created by the wizard in chapter 9.
3	Erase all the XLS that was saved to the desktop
4	Empty the trash
5	Erase all Holds from the ERM demo - Go to OD Admin Client - Log on to ODServer - Go to Holds - Delete all holds
6	Erase remaining 3 documents from the ERM exersize - Open OnDemand command window - Type in unloadERMdata - you may have to change Loadid "1FAA" number in the bat file located in c:\Program Files\IBM\OnDemand for Windows\bin\unloadERMdata
7	Reload ERM data - Open OnDemand command window - Type in loadERMdata

8	For the live report wizard demo: - The input file is **balsheet.data.class.FocusBalSheet.APR.2006.ard.** Make sure this file exists in: **C:\SampleData.** - Make sure that **FocusBalSheet** profiles does not exist in OnDemand. **Note:** These profiles are created during the live report wizard demo by the presenter. This is not something that is created by the students when they are working through the lab. During the live report wizard demo you will create these profiles so you want to make sure they do not exist before running the report wizard demo.
9	Use the WEBi configuration tool and re-set al all the original WEBi images form Focus Corporation to IBM. Files can be found in c:\BackupWEBi Images.

Chapter 6

Known Issues

The following are known issues and associated workarounds.

	Issue
1	Occasionally, we have received the following JavaService error during initial boot up. This does not seem to cause any problems, just click on the **Don't Send** button to bypass this message. 
2	In Lab 2, "*Providing Additional Value Using the OnDemand Solution*", there is a architectural problem with the StreamServe project that may result in less than 6 summary rows appearing on the summary sheet that is created and sent to Carly. This is a timing problem and is being addressed. To minimize the risk of this happening, we defined the storyboard so that Carly would only select six statements instead of all eleven. This minimizes the risk but does not make it go away completely. If this occurs, the student will see multiple summary statements instead of a single statement. Explain to the student that we are aware of this situation and it is being addressed. Most likely, if the student re-runs the summary creation step, it would run correctly the second time.

	Issue

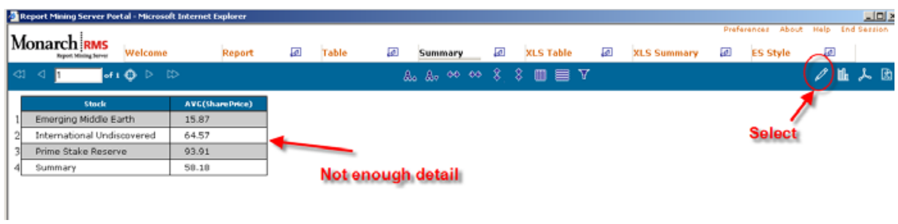
3 **StreamServe License**

The license we received from StreamServe expires at the end of each year. If this occurs, the StreamServe Windows services will not start. You may be able to get around this by resetting the date on the PC to a date prior to the previous year end. The “official” fix for this is to contact StreamServe for a new license. This license will come in a file called **strs.lic**. This file should be put into the following directory: **C:\Program Files\StreamServe\4.1.2\Server.**

4 In the customer self-service lab, when using Monarch/RMS, if the student selects more than eight documents, a Tomcat Server error occurs. This is being investigated. For now, we have modified the lab so that Carly enters search criteria to retrieve only six documents. Therefore, if the student follows the lab instruction, this error should not occur.

5 **Customer Self Service Lab**

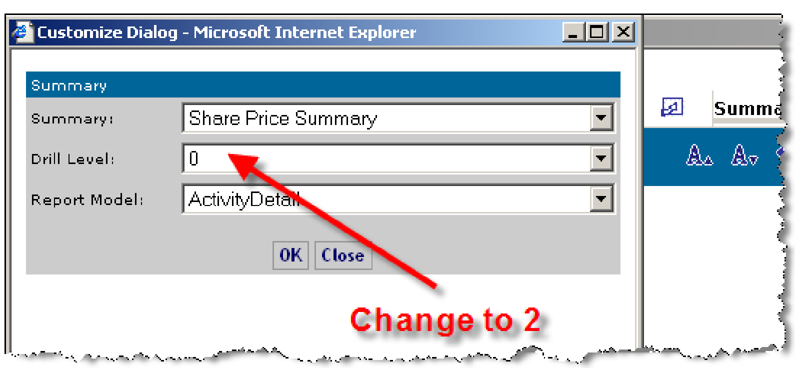
There is a default setting in the RMS interface of the Customer Self Service lab that needs to be changed to allow the user to see the detail that is shown in the lab handout. Currently the drill level is set at 0, which shows the least amount of detail:



When the customer gets to this point, have them click on the ‘pencil’ icon in the upper right corner of the interface (after selecting the Summary tab).

6 Have them update the ‘Drill Level’ from **0** to **2** in the Customize Dialog pop-up window.

Click OK and they will see the detail that is shown in the lab handout.



Note: if you have the time before the PoT starts, you can change this at the same time you ‘prime’ the system as described in the previous section.

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Appendix B. Trademarks and copyrights

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