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IBMDatacap 9.0.1

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| Configuration & Administration | WF262 / ZF262  Course Abstract |

Course description

This course shows you how to configure IBM Datacap and its components on a multi-system setup. You also learn about IBM Datacap Navigator configuration, system administration, and maintenance.

Duration

4.5 days

Delivery Method

Instructor-led (Classroom or Online) and Self-paced (SPVC)

Audience

* Administrators who are responsible for Datacap system configuration, administration, and maintenance
* Anyone who needs to know Datacap system configuration, administration, and maintenance

Prerequisites

* Recommended: Familiarity with data capturing concepts

Course Objectives

Upon completion of this course, participants will be able to:

**System & Component Configuration**

* Configure Datacap Server Service and Web Access
* Setup Datacap Authentication modes and Encryption
* Create Datacap security users and groups
* Configure Datacap Server for LLLDAP User Authentication
* Setup the Datacap Server, Datacap Web Server, and client in a multiple system configuration
* Configure Rulerunner and Datacap Maintenance Manager
* Configure Datacap Web Services wTM
* Configure Datacap Dashboard and monitor system performance
* Configure Datacap Report Manager (optional)

**Datacap Navigator Configuration**

* Change the User Settings
* Enable Datacap Navigator Single Sign On
* Configure Users and Groups
* Enable Rescan for the Verify task
* Create a custom Panel for a task
* Implement External Datacap Services for Datacap Navigator
* Configure Transactional Capture
* Install Datacap Navigator as a plug-in
* Customize the Datacap Navigator desktops

**System Administration**

* Create shortcuts for Web Client tasks
* Configure store and queue by options
* Identify Disaster Recovery concepts
* Migrate Data from Access to DB2 database
* Configure Application Globalization

**System Maintenance**

* Synchronize Job Monitor and Batch Folders
* Create and configure a Maintenance Manager Application
* Configure Event Logs

Topics

**Datacap overview**

* The three process phases for capturing documents

**Architecture**

* Datacap components
* Deployment Configuration Options
* Datacap Folders and files

**Datacap Clients**

* Capabilities overview

**Application design**

* Implementation Guiding Principals
* Application development strategy

**Configure a Single-system Configuration**

* Prerequisite System Components
* Configure a Single-system
* Export Encryption Keys
* Configure Datacap Server Service
* Configure Datacap Web
* Configure Internet Explorer

**Maintain Users and Groups, and Configure Security**

* Datacap Web Client
* Add users, groups, and stations
* Set privileges and permissions

**Authentication and Encryption**

* Five Authentication Systems
* Rules for External Authentication Systems
* Set Authentication System
* Authentication Path Templates
* Authentication for ADSI and LDAP
* Authentication for ADLDS and LLLDAP
* Encryption Considerations
* Encryption keys Update Procedure

**Multi-System Configuration Considerations**

* Multi-System Architecture
* Configure Datacap Server
* Configure Datacap Web Server
* Configure a Developer Workstation
* Configure a Remote User Workstation

**Configure Rulerunner**

* Rulerunner Service Authentication
* Rulerunner Service Share, Permissions, & Security
* Set DCOProcessor Permissions
* Configure the Task Profiles to Run in Rulerunner
* Configure Rulerunner to Run Tasks
* Configure Rulerunner to Run Your Application

**Configure Datacap Report Viewer (Optional)**

* Prerequisites for Report Viewer installation
* Set Datacap folder shared permission & security
* Add an application pool for Report Viewer
* ADSI or LDAP authentication with Report Viewer
* Create a Report Viewer Website
* Configure the location of the Datacap.xml file
* Configure the reports.xml file

**Configure Maintenance Manager**

* Maintenance Manager Components
* Prerequisites for Maintenance Manager Installation
* Set Datacap Folder Shared Permission & Security

**Configure wTM**

* Configure wTM Services

**Configure Datacap Dashboard**

* Performance planning and system requirements
* Installation and configuration
* Configure Dashboard in IBM Content Navigator
* Current processes
* Team statistics and accuracy

**Change Datacap Navigator User Settings**

* Scan tab - General and Layout settings
* Upload and Classify tab settings
* Verify tab settings
* Job Monitor tab settings
* Task List tab settings

**Configure Users and Groups**

* Configure Groups and Users
* Configure to scan PDF documents

**Enable Rescan for the Verify task**

* ConfigurationVerify Task -Default view
* Verify Task - with Rescan enabled
* Enable the Rescan in Datacap Navigator
* Enable the Rescan in tmweb client

**Custom Panels**

* Verification
* Batch Editor
* Start Panels

**Implement External Data Services**

* What are External Data Services (EDS)?
* External Data Services architecture
* When to use the sample EDS?
* Configure data validation for a field
* Choice lists with External Data Service (EDS)
* Customize the Job Monitor

**Navigator 9.0.1 Updates**

* Datacap Navigator Single Sign On enabled (SSO)
* Scan with ActiveX or TWAIN
* View Images with Daeja ViewOne
* Run an APT application in Datacap Navigator

**Transactional Capture in IBM Content Navigator**

* Default and Transactional Capture functionality
* Configure a Datacap application document
* Configure the TransactionCaptureOCR profile
* Direct Scan
* Add and modify Content Navigator menus
* Add Document and Scan Document menu items
* Scan a document
* Automatic property population
* Add a Batch

**Install and Customize Datacap Navigator**

* Install Datacap Navigator as a plug-in
* Configure Repositories for Datacap Applications
* Add Browse and Search Features to Datacap Navigator
* Change the name and theme for Datacap Navigator
* Customized Datacap Navigator desktop
* Configure the Datacap Navigator for scanning

**Create Shortcuts to Web Clients tasks**

* Shortcuts for Datacap Web Client
* Task Shortcut Configuration
* Datacap Web Components

**Virtual Stations and Queuing of Tasks**

* Understand Queuing of Batches
* Queue by Field Options
* Store Field Option
* Datacap Web Interface for task options

**Disaster Recovery**

* Backup and Restore Strategy
* Backup and Restore for Stateless Servers
* Backup and Restore the Datacap Server
* Backup the Database Server
* Backup the File Share

**Configure DB2 Server**

* Supported Databases
* Database Conversion Prerequisites
* Define the Database Structure
* Migrate the Application & Databases
* Configuring the Application to use the Database

**Application Globalization**

* Levels of globalization
* Application level globalization
* Datacap Desktop Translations
* Datacap Navigator Translations
* Resources.json translation keys
* Validation ruleset and message

**System Maintenance**

* Routine maintenance
* Preventive maintenance
* Corrective maintenance

**Maintenance manager**

* What can Maintenance Manager do and what are its uses?
* Maintenance Manager run methods
* Create a Maintenance Manager application
* Maintenance Manager action categories
* Procedure to auto delete batches

**Event Logs**

* Identify Logs
* Control log content
* Maintenance Manager actions for logging
* Maintain Event Logs
* Datacap Logs locations