IBM DB2 Content Manager

OnDemand for iSeries / Kofax Ascent Capture

Release Script Guide



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Table of Contents

Preface	vi
Updates in This Edition	vi
How This Book Is Organized	vii
Part 1. OnDemand Spool File Archive Integration with	
Kofax Ascent Capture	1
Chapter 1 Overview	1
OnDemand for iSeries AnyStore Feature	2
Ascent Capture Overview	2
System Overview - Example	2
Chapter 2. Setup Tasks - iSeries	1
Prereguisite Software	4
Install Integration Software on iSeries	4
Remove Integration Software from iSeries	4
OnDemand for iSeries AnyStore Setup	5
Report Group Setup using the Report Administration Menu	6
Report Group Setup using iSeries Navigator	11
Report Definition Setup using the Report Administration	15
Report Definition Setup using iSeries Navigator	15
Create an Image IFS Subdirectory	27
Multiple Scan/Release Workstations	27
Chapter 3. Setup Tasks - Workstation	29
Prerequisite Software	29
Install and Setup Integration Software on the Workstation	29
Create an iSeries Connection using iSeries Access	29
Create an ODBC Data Source	29
Map OS/400 Network Drive	31
Pemove IBM OnDemand for iSeries Release	32
Ascent Capture Setup	32 22
Create Index Field Types	32
Create a Document Class	35
Create a Batch Class	38
OnDemand for iSeries 32-bit Release Script Setup	42
Chapter 4. Release Processing	52
Ascent Release Program	52
Chapter 5. AnyStore Processing	53
AnyStore Monitor	53
Changing the Default Inactivity Time	53
Ending the AnyStore Monitor	54

Ending the AnyStore Monitor	54
Chapter 6. Troubleshooting and Error Recovery	55
Error Categories	55
Information Needed Before Contacting Technical Support	57
Chapter 7. User Exit Programming	59
Inbound User Exit - QRLSEXIT01	59
Outbound User Exit - QRLSEXIT02	59
Chapter 8. Commands	60
Commands	60
STRMONANYS	60
ENDMONANYS	61
DSPLOGANYS	61
DLTLOGANYS	62
Chapter 9. Backup and Recovery	63
Ascent Capture Database Backup and Recovery	63
OnDemand for iSeries AnyStore Integration Database	
Backup and Recovery	63
OnDemand for iSeries Backup and Recovery	63
Chapter 10. Security Considerations	64
OS/400 Integrated File System Security	64
OnDemand for iSeries Security	64
Chapter 11. Error Messages	65
Ascent Capture Error Messages	65
OnDemand Graphical Report Definition	65
Chapter 12. Using the iSeries AnyStore Monitor to	
Archive User Defined Data	66
Setting The PC File Extension to Launch a PC Application	66
Using iSeries Navigator to set the PC File Extension	66
Using a 5250 session to set the PC File Extension	67
Working with AnyStore Monitor Files to Archive User	
Defined Data	67
Chapter 13. Content Manager Integration	70
Part 2. OnDemand Common Server Integration with	
Kofax Ascent Capture	71
Chapter 14. Overview	72
Ascent Capture Release Files	72
Chapter 15. Setup Tasks - iSeries and Workstation	73
Prerequisite Software	73
Change Regional Date Settings	73
OnDemand for iSeries Setup	74

Create an application group for Ascent Capture	74
Create an application for Ascent Capture	78
Create a folder for Ascent Capture	80
Ascent Capture Setup	82
Create New Index Fields	82
Create a New Document Class	83
Create a New Form Type	84
Create a New Batch Class	84
OnDemand Release Script Setup	87
Chapter 16. Release Processing	93
Run Batch Manager	93
Create New Batch	93
Scan Batch	93
Index/Validate Batch	95
Batch Release	96
Store Ascent Capture Batch	97
Running arsload API	97
Recovering from arsload API failure	97
Appendix A. Additional Information Sources	99
Manuals	99
Ascent Capture	99
OnDemand for iSeries	99
Web Sites	99
Informational APARs	99
IBM OnDemand for iSeries	99
IBM OnDemand Enhancements PRPQ	99
Appendix B. Notices	100
Programming Interface Information	101
Glossary	102
Index	104

Preface

The integration between Content Manager OnDemand (OnDemand) and Kofax Ascent Capture can be thought of as an electronic file cabinet. Documents can be scanned, indexed, archived, migrated to other media (tape or optical storage), and retrieved for viewing. This solution does not have workflow or any of the Content Manager enhanced features like Forms or Masks. If any of those features are needed, please contact your IBM marketing representative about Content Manager for iSeries (formerly know as ImagePlus VisualInfo/400).

Throughout this book, you will be taken through sample definitions for a hospital application. A few terms are used that are foreign to most people, like Encounter and Tab. It is not important to understand what an Encounter or Tab is, just that it represents an index, or key, to an archived document.

Updates in This Edition

This edition of the document is updated to include

- Part 1: OnDemand Spool File Archive Integration with Kofax Ascent Capture
- Part 2: OnDemand Common Server Integration with Kofax Ascent Capture

How This Book Is Organized

This book is organized as follows:

Part 1: OnDemand Spool File Archive Integration with Kofax Ascent Capture

• Chapter 1, Overview

This Chapter gives you an overview of the OnDemand for iSeries AnyStore Integration Release Script for use with OnDemand Spool File Archive.

• Chapter 2, Setup Tasks - iSeries

This Chapter gives you the instructions necessary to install and configure all software on the iSeries.

• Chapter 3, Setup Tasks - Workstation

This Chapter gives you the instructions necessary to install and configure all software on the workstation.

• Chapter 4, Release Processing

This Chapter gives you instructions for releasing batches of documents from Ascent Capture to OnDemand Spool File Archive.

• Chapter 5, AnyStore Processing

This Chapter describes how to control AnyStore processing on the iSeries using the AnyStore monitor.

• Chapter 6, Error Processing

This Chapter describes the methods that can be used to correct errors that can occur as a result of incorrect input data and recommends possible solutions.

• Chapter 7, User Exit Programming

This Chapter describes two available user exit programs and how they might be used to reduce keying and improve accuracy when indexing documents.

• Chapter 8, Commands

This Chapter describes the commands available with the AnyStore Integration Release Script PRPQ.

• Chapter 9, Backup and Recovery

This Chapter discusses backup and recovery considerations for this solution.

• Chapter 10, Security Considerations

This Chapter describes security-related topics.

• Chapter 11, Error Messages

This Chapter describes sources of information that can be used to investigate error messages.

• Chapter 12, Using the iSeries AnyStore Monitor to Archive User-Defined Data

This Chapter describes the method you can use to archive user-defined AnyStore data using the AnyStore monitor rather than the AnyStore APIs.

• Chapter 13, Content Manager Integration

This Chapter discusses the integration options for OnDemand AnyStore with IBM Content Manager.

Part 2: OnDemand Common Server Integration with Kofax Ascent Capture

• Chapter 14, Overview

This Chapter provides an overview of the OnDemand for iSeries Integration Release Script for use with OnDemand Common Server.

• Chapter 15, Setup Tasks - iSeries and Workstation

This Chapter gives you the instructions necessary to install and configure all software on both the iSeries server and workstation.

• Chapter 16, Release Processing

This Chapter contains instructions for releasing batches of documents from Ascent Capture to OnDemand Common Server.

Appendices

- Appendix A, Additional Information Sources
- Appendix B, Notices

Part 1. OnDemand Spool File Archive Integration with Kofax Ascent Capture

Chapter 1. Overview

This solution is used to integrate the IBM OnDemand for iSeries Spool File Archive and AnyStore software with the Kofax Ascent Capture product. This solution is provided for V5R1 and higher of OnDemand for iSeries. (This solution will work for releases back to V4R4 of OnDemand for AS/400, but those releases are no longer supported and are not covered in this document.)

OnDemand for iSeries AnyStore Feature

The OnDemand for iSeries AnyStore feature provides Application Program Interfaces (APIs) which allow a user to store data into and retrieve data from OnDemand for iSeries. AnyStore data is handled similar to OnDemand for iSeries Spooled File Archive data in that:

- It can be retrieved using the report name, report date and up to five (5) user-defined searchable keys.
- It fits into the OnDemand for iSeries storage hierarchy.
- OnDemand Spooled File Archive commands can be used for administration of AnyStore objects.
- Security is available for report groups, reports, and optionally for individual key values.

AnyStore data is different from OnDemand for iSeries Spooled File archive data in that:

- It cannot be stored or retrieved using OnDemand report archive or retrieval commands.
- It can only be stored and retrieved via the AnyStore APIs.
- Data archived with AnyStore cannot be viewed using a 5250 display, you must use the OnDemand Client.
- AnyStore reports are always part of a report group.
- An AnyStore Report Definition can only be used to store AnyStore objects.

Ascent Capture

Ascent Capture, from Kofax, is a high-volume batch scanning and indexing application that lowers the cost of document capture by reducing the amount of manual labor involved in the image capture process. Ascent Capture consists of five basic modules:

- Scanning or Importing (includes document preparation and batch scanning)
- Image Cleanup and Optical Character Recognition (deskew, despeckle, destreak, deshade, line removal, black border removal, image filtering, and full-text or zonal OCR to assist indexing)
- Validation (assigning keywords or values to each document so they can be retrieved later from a database). This includes bar code recognition, with an appropriate PC adapter card. (Validation was known as Index in Ascent Capture V3)

- Rescanning (checking documents for readability and rescanning if necessary)
- Release (export of images and indexes to OnDemand for iSeries)

System Overview - Example

This solution is made up of several software and hardware components. It includes scanners, PCs, a Local Area Network and an iSeries. With all of these different pieces of software involved, the setup time for the first document type may appear to be a little long, but many of these setup activities are only done once, so subsequent document types can be setup more quickly.

Our example involves scanning in hospital patient documents, then using the following keys to retrieve the documents after they have been archived into OnDemand for iSeries:

- Encounter A number representing a visit, or visits, to a hospital for a single illness
- Last Name The last name of the patient
- History Number A sequential number designating a single hospital visit by a patient
- Tab The name of a file tab, like LAB or X-RAY
- · Hospital The name, or hospital number, of the hospital visited

The usual steps to capture and view a document image are:

- 1. Scan in a document using Ascent Capture at a workstation.
- 2. Enter the values for each of the keys (or indexes) for the scanned document using Ascent Capture.
- 3. Verify the key values are entered correctly using Ascent Capture.
- 4. Release the document images and the key values for each document (transfer them from the PC to the iSeries) using the OnDemand for iSeries AnyStore Integration Release program.
- 5. Archive the image into OnDemand for iSeries using the AnyStore monitor.
- 6. Use the OnDemand Client to view the image

Chapter 2. Setup Tasks - iSeries

Prerequisite Software

The following software is required and assumed to be installed prior to using this solution. Refer to product specific documentation for installation and setup.

- TCP/IP communications
- OnDemand for iSeries Base feature (product option *BASE)
- OnDemand for iSeries Spool File Archive feature (not Common Server; product option 1)
- OnDemand for iSeries AnyStore feature (product option 4)
- OnDemand for iSeries Server feature (product option 5)
- OnDemand Client
- IBM iSeries Access for Windows V5 (5722-XE1)
- OnDemand for iSeries Administrative Functions plug-in for iSeries Navigator
- Kofax Ascent Capture V5.0 or higher

Install Integration Software on iSeries

- Sign on to the system as QSECOFR
- If the *BASE option of product 5799GEQ has not been previously installed, then use the following command:

RSTLICPGM LICPGM(5799GEQ) DEV(TAPxx) OPTION(*BASE) ENDOPT(*LEAVE)

- (Note: TAPxx = your tape drive name)
- After the *BASE feature is installed, use the following command to install the AnyStore Integration Release Script feature:

RSTLICPGM LICPGM(5799GEQ) DEV(TAPxx) OPTION(3)

 After option 3 is installed you must install all the currently available PTFs for 5799GEQ *BASE and option 3. A list of PTFs is included in the information APAR II11458.

Remove Integration Software from iSeries

If you need to remove the Integration software for any reason, perform the following steps:

- Sign on to the system as QSECOFR.
- To remove the AnyStore Integration feature of the OnDemand Enhancements PRPQ, use the following command:

DLTLICPGM LICPGM(5799GEQ) OPTION(3)

• If the *BASE option of product 5799GEQ is no longer required use the following command:

```
DLTLICPGM LICPGM(5799GEQ) OPTION(*BASE)
```

OnDemand for iSeries AnyStore Setup

Two things must be defined within OnDemand for iSeries for the AnyStore environment:

- A Report Group
- A Report Definition

AnyStore Report Groups and Report Definitions can be creating using either of two methods.

- 1. The Report Administration Menu (from a 5250 session)
- 2. The OnDemand Archive plug-in (from iSeries Navigator)

The following pages will show both of the methods that can be used to create Report Groups and AnyStore Report Definitions.

Report Group Setup using the Report Administration Menu

The creation of a sample report group is shown on the following OS/400 screens:

/	MAIN	OS/400 Main Menu)
			System:	RDR400M
	Select	one of the following:		
	1.	User tasks		
	2.	Office tasks		
	3.	General system tasks		
	4.	Files, libraries, and folders		
	5.	Programming		
	6.	Communications		
	7.	Define or change the system		
	8.	Problem handling		
	9.	Display a menu		
	10.	Information Assistant options		
	11.	Client Access/400 tasks		
	90.	Sign off		
	Selecti	on or command		
	===> <u>gr</u>	ondemand		
-	F3=Exit F23=Set	F4=Prompt F9=Retrieve F12=Cancel F13=Infor initial menu	mation A	ssistant /

Enter GO ONDEMAND from any command line to reach the OnDemand for iSeries main menu.

ONDEMAND	OnDemand for AS/400		
		System:	RDR400M
Select one of the foll	owing:		
 Report Adminis Object Adminis Record Archive Media Administ 	tration Menu tration Menu Menu ration Menu		
90. Sign off			
Selection or command ===> <u>1</u>			
F3=Exit F4=Prompt F9=R F16=System Main Menu	etrieve F12=Cancel F1	3=Information Ass	;istant

Select Option 1 from the main OnDemand for iSeries Menu and press enter.

```
RDARSRPT
                OnDemand Report Administration Menu
                                                    System: RDR400M
Select one of the following:
     1. Retrieve Reports
     2. Work with Report Collections
    3. Work with Report Overlays
    4. Work with Report Definitions
     5. Work with Report Groups
   10. Edit/Authorize OnDemand Users
    11. Edit/Authorize OnDemand Report Users
    12. Edit/Authorize OnDemand Report Group Users
   13. Work with Key Security
   20. Report Definition Menu
    21. Report Utility Menu
                                                           More...
Selection or command
===> 5
F3=Exit F4=Prompt F9=Retrieve F12=Cancel F13=Information Assistant
F16=System Main Menu
```

```
At the OnDemand Report Administration Menu select option 5, Work with Report Groups and press enter.
```

/	Work with Admin for OnDemand (WRKADMRDAR)
	Type choices, press Enter.
	Administrator function > *RPTGRP*REPORT, *RPTGRP, *RPTOVLReport group
	Bottom F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display F24=More keys

Leave the Report Group set to *ALL and press enter.

Work with Report Groups RDR400M 8/28/03 09:30:49 Type options, press Enter. 1=Create 2=Change 3=Copy 4=Delete 5=Display Opt Group Text 1 <u>ANYSKOFAX</u> _ NAOANYSGRP NAO's report group F3=Exit F5=Refresh F12=Cancel

To create a new report group, enter a 1 in the option field and enter your report name (in this example ANYSKOFAX) in the Group Name field and press enter.

	Create Report Group - Description	RDR400M
	8/28	3/03 09:35:03
Type cho	ices, press Enter.	
Group . Group abl	ANYSKOFAX Name breviation <u>KOF</u> Kofax/AnyStore Grou	n Definition
10110	<u></u>	<u>p Der mit er en</u>
F3=Exit	F12=Cancel	,

Define the characteristics of the report group:

- Enter any 3 character abbreviation (in this example KOF) in the group abbreviation field.
- Enter a text description for this group, such as "Kofax/AnyStore Group Definition"
- Press the Enter key.

Create Report Group - Keys RDR400M 8/28/03 09:40:20 Group ANYSKOFAX Type choices, press Enter. Key 1 group name Encounter Length 25 1-25 Minimum search characters 1-25 1 Y=Yes, N=No Key security Ν Key 2 group name <u>History #</u> Length <u>20</u> 1-20, 0=Not used 1____ 0-20 Minimum search characters Key security Ν Y=Yes, N=No Key 3 group name <u>Last Name</u> Length <u>20</u> 1-20, 0=Not used <u>1</u> 0-20 Minimum search characters . . . Key security N Y=Yes, N=No More... F3=Exit F12=Cancel

Next, there may be up to five key fields, or indexes, defined for retrieving your AnyStore data. In this example use the key fields shown above.

The first three key fields appear on this screen. To reach the next two key fields, press the page down key.

Create Report Group - Keys RDR400M 8/28/03 09:47:10 Group ANYSKOFAX Type choices, press Enter. Key 4 group name Tab Length <u>20</u> 1-20, 0=Not used Minimum search characters <u>1</u> 0-20 Key security Ν Y=Yes,N=No Length <u>15</u> 1-15, 0=Not used Minimum search characters 1____ 0-15 Y=Yes,N=No N Bottom F3=Exit F12=Cancel

Here, sample key fields four and five are defined.

All five key fields are defined in the example. A minimum of one key field is required.

After filling in the desired key fields, press the Enter key.

	Work with Report Groups	8/28/03	RDR400M
Type options, press En 1=Create 2=Change Opt Group Text	nter. 3=Copy 4=Delete	5=Display	
NAOANYSGRP NAO's	report group		
F3=Exit F5=Refresh Report group created.	F12=Cancel F5 for Refresh.		Bottom
			/

A message is displayed indicating that the group definition is being created.

After the definition is created, the Work with Report Groups Screen is redisplayed, as shown above. To verify that the report group has been created, press F5 to refresh the list. The refreshed list appears below.

To exit the Work with Report Groups display, press the F3 key.

		Work with	Report Group	S	RDR400M
				8/28/03	09:55:13
Type opt 1=Create Opt Grou	tions, press e 2=Change p Text	Enter. 3=Copy	4=Delete	5=Display	
_ ANYSK _ NAOAN	KOFAX Kofax NYSGRP NAO's	/AnyStore Gr report grou	oup Definiti p	on	
F3=Exit	F5=Refresh	F12=Cancel			Bottom

Report Group Setup using iSeries Navigator

Click on Start > Programs > IBM iSeries Access for Windows > iSeries Navigator

You should see an iSeries Navigator window, similar to the one shown below. Click on the '+' sign in front of the iSeries connection name.

Ø iSeries Navigator			_ 0 🛛
File Edit View Help			
Environment: My Connections	My Connections		
🖅 🌒 Management Central (Rdr400m.raleigh.ibm.com)	Name	Signed On User	Description
My Connections Rdr400m.raleigh.ibm.com	Rdr400m.raleigh.ibm.com M		М
1 - 1 of 1 objects			1

Enter your user id and password and click OK.

Signon to	iSeries	? 🔀
	Server:	RDR400M.RALEIGH.IBM.COM
	User ID:	DBRYANT
	Password:	*******
		OK Cancel

Click on the '+' sign in front of OnDemand Archive.

Ø iSeries Navigator			
File Edit View Help			
Environment: My Connections	My Connections		
🕀 🏽 Management Central (Rdr400m.raleigh.ibm.com)	Name	Signed On User	Description
My Connections My Connections Rdr400m.raleigh.ibm.com Basic Operations Work Management Wark Manager Backup, Recovery and Media Services OnDemand Archive	Rdr400m.raleigh.ibm	.com	Μ
1 - 1 of 1 objects			

Click on the '+' sign in front of Spool File Archive Administration.

✓ iSeries Navigator			_ 🗆 🔀		
File Edit View Help					
Environment: My Connections	My Connections				
Management Central (Rdr400m.raleigh.ibm.com) My Connections Rdr400m.raleigh.ibm.com Basic Operations Work Management AFP Manager Backup, Recovery and Media Services OnDemand Archive Media Administration Media Administration Common Server Administration	Name Rdr400m.raleigh.ibm.com	Signed On User	Description M		
1 - 1 of 1 objects					

Click on Report Groups, the right panel of the screen will be updated with of list of OnDemand report groups.

Ø iSeries Navigator			_ 🗆 🔀
File Edit View Help			
Environment: My Connections	My Connections		
Management Central (Rdr400m.raleigh.ibm.com) My Connections Rdr400m.raleigh.ibm.com Rdr400m.r	Name Rdr400m.raleigh.ibm.com	Signed On User	M M
1 - 1 of 1 objects			

Right click on one of the report groups listed, as shown below, and select **New Report Group**.

File Edit View Help			
Environment: My Connections	Rdr400m.raleigh.il	om.com: Report Grou	ps
 Management Central (Rdr400m.raleigh.ibm.com) My Connections Rdr400m.raleigh.ibm.com Basic Operations Work Management AFP Manager Backup, Recovery and Media Services OnDemand Archive OnDemand Archive Spool File Archive Administration Report Definitions Migration Policies Screen Overlays Media Administration Common Server Administration 	Group GRP0 Delet GRP0 PROJUU PROJ01 PROJ02 PROJ06	Abbreviation	Description Project Group group reports for ond04 Project Status Report Different Types of Images Project Reports OND00 Project Reports project report group Project Report Group

Enter the name of the report group, the group abbreviation, and a description. In this example, you use ANYSKOFAX as the Name and KOF as the Abbreviation. Click on Key Number 1 and then click on the Change button.

Add or Change a Repor	rt Group 🔹 🕄 🔀
Name:	ANYSKOFAX
Abbreviation:	KOF
Description:	AnyStore - Kofax Integration
Keys:	
Number Key Name 1 not defined 2 not defined 3 not defined 4 not defined 5 not defined	Searchable Change
	OK Cancel Help

Complete the key definition information as shown below and click on OK.

Key Definition		? 🔀
Key number:	1	
Name:	Encounter	
Length:	25 •	
🔽 Key is searchable		
Minimum characters for sea	rch:	1 -
🔽 Key is secured		
OK	Cancel	Help

Repeat this process to define keys 2-5 using the same key names and attributes as described on page 80. When finished, the window should look like the display below:

Add or Ch	ange a Repo	rt Group		? 🔀
Name:		ANYSKOFAX	-	
Abbreviatio	n:	KOF		
Description	c .	AnyStore - Kofax	Integration	
Keys:				
Number	Key Name	Searchable		
1	Encounter	Yes		(
2	History #	Yes		Lhange
3	Last Name	Yes		
4	lab Usealat	Yes		Clear
0	Hospital	res		
1				
		ок 🔓 🗌	Cancel	Help

After defining all the keys, click on OK. Press F5 to refresh the list of report groups. The new ANYSKOFAX report group now appears in the report group list.

Environment: My Connections Rdr400m.raleigh.ibm.com: Report Groups Image: Management Central (Rdr400m.raleigh.ibm.com) Group Abbreviation Description Image: Rdr400m.raleigh.ibm.com Rdr400m.raleigh.ibm.com ManySkOFAX KOF AnyStore - Kofax Integration Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com Image: Rdr400m.raleigh.ibm.com	ile Edit View Help			
Image: Management Central (Rdr400m.raleigh.ibm.com) Group Abbreviation Description Image: Market Management Image: Market Management KOF AnyStore - Kofax Integration Image: Market Management Image: Market Management Image: Market Management Image: Market Management Image: Market Management Image: Market Management Image: Market Mark	Environment: My Connections	Rdr400m.raleigh.ibn	n.com: Report Grou	ps
	 Management Central (Rdr400m.raleigh.ibm.com) My Connections Rdr400m.raleigh.ibm.com Basic Operations Work Management AFP Manager Backup, Recovery and Media Services OnDemand Archive Spool File Archive Administration Report Groups Screen Overlays Media Administration Common Server Administration 	Group ANYSKOFAX GRP03 GRP04 GRP05 FROJ00 PROJ01 PROJ01 PROJ02 PROJ06	Abbreviation KOF PRO G04 G05 IMG P00 P01 P02 P06	Description AnyStore - Kofax Integration Project Group group reports for ond04 Project Status Report Different Types of Images Project Reports OND00 Project Reports project report group Project Report Group

Report Definition Setup using the Report Administration Menu

Signon to the System using a User ID which is an OnDemand Administrator.

System: RDR Select one of the following:	400M
Select one of the following:	
1. User tasks	
2. Office tasks	
3. General system tasks	
4. Files, libraries, and folders	
5. Programming	
6. Communications	
7. Define or change the system	
8. Problem handling	
9. Display a menu	
10. Information Assistant options	
11. Client Access/400 tasks	
90. Sign off	
Selection or command	
===> go ondemand	
F3=EXIT F4=Prompt F9=Retrieve F12=Cancel F13=Information Assis	tant

Enter GO ONDEMAND

ONDEMAND	OnDemand for AS/400		
Colort one of the follo		System:	RDR400M
Select one of the form	wing:		
1. Report Administr	ation Menu		
2. Object Administr	ration Menu		
3. Record Archive M	lenu		
4. Media Administra	ILLOII MEIIU		
90. Sign off			
Selection or command ===> 1			
F3=Exit F4=Prompt F9=	Retrieve F12=Cancel	F13=Information	Assistant
F16=System Main Menu			

Select menu option 1, Report Administration Menu, and press Enter.

```
RDARSRPT
                OnDemand Report Administration Menu
                                                      System: RDR400M
Select one of the following:
   1. Retrieve Reports
   2. Work with Report Collections
   3. Work with Report Overlays
   4. Work with Report Definitions
   5. Work with Report Groups
  10. Edit/Authorize OnDemand Users
  11. Edit/Authorize OnDemand Report Users
  12. Edit/Authorize OnDemand Report Group Users
  13. Work with Key Security
  20. Report Definition Menu
  21. Report Utility Menu
                                                             More...
Selection or command
===> 4
F3=Exit F4=Prompt F9=Retrieve F12=Cancel F13=Information Assistant
F16=System Main Menu
```

Select menu option 4, Work with Report Definitions, and press Enter.

```
Work with Admin for OnDemand (WRKADMRDAR)

Type choices, press Enter.

Administrator function . . > *REPORT *REPORT, *RPTGRP, *RPTOVL...

Report name . . . . . . <u>*ALL</u> Name, generic*, *ALL...

Bottom

F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display

F24=More keys
```

Leave the *ALL default value and press Enter.

Work with Report Definitions RDR400M 8/28/03 12:56:43 Type options, press Enter. 1=Create 2=Change 4=Delete 5=Display 3=Copy Opt Report Version Type Text <u>1</u> <u>ANYSKOFAXR</u> <u>01</u> ALPHAPAGE 01 PAGE Page report with alpha keys _ 01 DOC Check Statements (OnDemand Sample) CHECKST CHECKSTMTS 01 DOC Check Statements (OnDemand Sample) CHECKS0001DOCOND00Checking StatementsCHECKS0201DOCOND02Checking StatementsCHECKS0401DOCOND04Checking StatementsCHECKS0501DOCOND05Checking Statements CHECKS0501DOCOND05Checking StatementsCHECKS0601DOCOND06Checking StatementsCHECKS0701DOCOND07Checking StatementsCHECKS1001DOCOND10Checking StatementsCHECKS1101DOCOND11Checking StatementsCHECK0301DOCCheck Statements for OND03 _ More... F3=Exit F5=Refresh F12=Cancel

Enter a 1 in the option field, and your report name and version (for this example ANYSKOFAXR in the report field and 01 in the version field) and press Enter to begin creating the report definition.

Create Report Definiti	on - Environme	nt RDR400M
		8/28/03 13:58:27
Type choices, press Enter.		
Report	<u>ANYSKOFAXR</u>	Name
Version	<u>01</u>	01-99
Report type	ANYS	DOC, PAGE NODX, UBND
Input record length		20-256
Policy name	D900PTICAL	Name
Report overlay		Name
Report data type	<u>*IFS</u>	*SCS, *AFPDS *OTHER
Report group	<u>ANYSKOFAX</u>	Name
Translate print control	N	Y=Yes, N=No
Printer file	<u>*LIBL</u>	Name
Text	<u>AnyStore - Ko</u>	fax Images
Compression	N	Y=Yes, N=No
Posting date type	_	More
F3=Exit F12=Cancel		

Fill in the information as shown above and press the Page Down key.

Create Report Definition - Environment RDR400M 8/28/03 14:26:23 Type choices, press Enter. Bypass report results display . . . Y=Yes, N=No N Bypass document results display . . Y=Yes, N=No N Search all sequence numbers Y=Yes, N=No <u>Y</u> Name <u>*LIBL</u> Name Library <u>*LIBL</u> Name <u>*LIBL</u> <u> 6 0-9999</u> Object Class Bottom F3=Exit F12=Cancel

Set the Object Class to 6 (TIFF) and press the Field Exit key. Then press the Enter key.

	Create R	eport Defini	tion - Key	S	RDR400M
Report/Versi	.on		: A	8/28/03 NYSKOFAXR / 0	14:36:19 1
Type choices	s, press Enter.				
Key 1 name	e		<u>Encounter</u>		
Length			_25	1-25	
Minimum se Location:	arch character	s	1	1-length	
Column .			0	0-255	
Line -OR-			0	0-256	
Pivot va	lue				
Length	1		0	0-16	
Column	1		0	0-255	
+- lir	ne offset		0	-255-256	
Lower case	e key		<u>N</u>	Y=Yes, N=No	
Key securi	.ty		N	Y=Yes, N=No	
Multi-key			<u>N</u>	Y=Yes, N=No	
					More
∖rj=ĽXil fi	.∠=cancei				

Define Key 1 as shown above for this example and press the Page Down key.

Create Report Definition - Keys RDR400M 8/28/03 14:36:19 Type choices, press Enter. Key 2 name <u>History #</u> Length 1-20, 0=Not used 20 Minimum search characters __1 0-length Location: Column ____0 0-255 0 0-256 -OR-Pivot value <u> 0 0-16</u> Length 0-255 Column ____0 +- line offset 0 -255-256 Lower case key \underline{N} Y=Yes, N=No Key security \underline{N} Y=Yes, N=No Multi-key \underline{N} Y=Yes, N=No More... F3=Exit F12=Cancel

Define Key 2 as shown above and press the Page Down key.

Create Report Definiti	lon – Keys		RDR400M
Report/Version	: .	8/28/03 ANYSKOFAXR /	14:36:19 01
Type choices, press Enter.			
Key 3 name	Last Nam	e	
Length	_20	1-20, 0=Not	used
Minimum search characters Location:	1	0-length	
Column	0	0-255	
Line	0	0-256	
Pivot value			
Length	0	0-16	
Column	0	0-255	
+- line offset	0	-255-256	
Lower case key	N	Y=Yes, N=No	
Key security	<u>N</u>	Y=Yes, N=No	
Multi-key	N	Y=Yes, N=No	
			More
F3=Exit F12=Cancel			/

Define Key 3 as shown above and press the Page Down key.

(Create Report Definition - Keys	RDR400M
Report /Version	- 2NV	8/28/03 14:36:19 SKOFAXR / 01
Report/Verbion	· · · · · · · · · · · · · · · · · · ·	Shor And y of
Type choices, press	s Enter.	
Key 4 name	<u>Tab</u>	
Length	· · · · · · · · · <u>20</u> 1·	-20, 0=Not used
Minimum search ch Location:	haracters <u>1</u> 0 [.]	-length
Column	· · · · · · · · <u>0</u> 0 [.]	-255
Line -OR-	· · · · · · · · <u>0</u> 0·	-256
Pivot value .		
Length		0-16
Column	0	0-255
+- line offse	et0	-255-256
Lower case key .	<u>N</u> Y:	=Yes, N=No
Key security	<u>N</u> Y:	=Yes, N=No
Multi-key	<u>N</u> Y:	=Yes, N=No
\F3-Fwit F12-Cance	el	More
L'S-LATE I IZ-CUIICO	C+	

Define Key 4 as shown above and press the Page Down key.

/	Create Report Definition - Keys		RDR400M	\nearrow
	8/28 Report/Version	2 / 03	14:36:1 01	9
	Type choices, press Enter.			
	Key 5 name <u>Hospital</u>			
	Length <u>15</u> 1-20, 0=	Not	used	
	Minimum search characters <u>1</u> 0-length Location:	L		
	Column <u>0</u> 0-255			
	Line <u>0</u> 0-256 -OR-			
	Pivot value			
	Length <u>0</u> 0-16			
	Column			
	+- line offset 0 -255-2	56		
	Lower case key \underline{N} Y=Yes, N	I=No		
	Key security \underline{N} Y=Yes, \underline{N}	í=No		
	Multi-key \underline{N} Y=Yes, \underline{N}	í=No		
	F3-Frit F12-Cancel		More)
1				

Define Key 5 as shown above and press the Enter key.

```
Work with Report Definitions
                                                   RDR400M
                                           8/28/03 12:56:43
Type options, press Enter.
 1=Create 2=Change
                   3=Copy 4=Delete 5=Display
Opt Report Version Type Text
              01 PAGE Page report with alpha keys
  ALPHAPAGE
_
 _ ANYSKOFAXR 01 ANYS AnyStore - Kofax Images
             01 DOC Check Statements (OnDemand Sample)
   CHECKST
_ CHECKSTMTS 01 DOC Check Statements (OnDemand Sample)
CHECKS07
             01 DOC OND07 Checking Statements
_
  CHECKS11
              01
                  DOC OND10 Checking Statements
_
              01 DOC OND11 Checking Statements
                                                  More...
F3=Exit F5=Refresh F12=Cancel
```

Press the F5 key to see a refreshed list of Report Definitions, including the new ANYSKOFAXR report definition.

Report Definition Setup using iSeries Navigator

Click on Start > Programs > IBM iSeries Access for Windows > iSeries Navigator

You should see an iSeries Navigator window, similar to the one shown below. Click on the '+' sign in front of the iSeries connection name.

Ø iSeries Navigator			
File Edit View Help			
Environment: My Connections	My Connections		
😥 📳 Management Central (Rdr400m.raleigh.ibm.com)	Name	Signed On User	Description
My Connections Rdr400m.raleigh.ibm.com	Rdr400m.raleigh.ibm.com		М
1 - 1 of 1 objects	1		1

Enter your user id and password and click OK.

Signon to	iSeries	? 🔀
	Server:	RDR400M.RALEIGH.IBM.COM
	User ID:	DBRYANT
	Password:	*******
		OK Cancel

Click on the '+' sign in front of OnDemand Archive.

Ø iSeries Navigator				X
File Edit View Help				
Environment: My Connections	My Connections			
🕀 🎚 Management Central (Rdr400m.raleigh.ibm.com)	Name	Signed On User	Description	
My Connections My Connections Rdr 400m.raleigh.ibm.com Basic Operations Work Management Work Manager Backup, Recovery and Media Services OnDemand Archive	Rdr400m.raleigh.ibm.	com	М	
1 - 1 of 1 objects				

Click on the '+' sign in front of Spool File Archive Administration.

File Edit View Help Environment: My Connections Management Central (Rdr400m.raleigh.ibm.com) My Connections Media A	✓ iSeries Navigator			
Environment: My Connections My Connections Management Central (Rdr400m.raleigh.ibm.com) Name Signed On User Description My Connections Marce Signed On User Description My Connections Marce Signed On User Description Rdr400m.raleigh.ibm.com Marce Marce Marce Description Rdr400m.raleigh.ibm.com Marce Marce Marce Marce Rdr400m.raleigh.ibm.com Marce Marce Marce Marce Rdr400m.raleigh.ibm.com Marce Marce Marce Marce Rdr400m.raleigh.ibm.com Marce Marce Marce Marce Marce Rdr400m.raleigh.ibm.com Marce Marce Marce Marce Marce Marce Rdr400m.raleigh.ibm.com Marce Marce </th <th>File Edit View Help</th> <th></th> <th></th> <th></th>	File Edit View Help			
Image: Management Central (Rdr400m.raleigh.ibm.com) Image: My Connections Image: My Connections <th>Environment: My Connections</th> <th>My Connections</th> <th></th> <th></th>	Environment: My Connections	My Connections		
My Connections Rdr400m.raleigh.ibm.com Basic Operations Work Management AFP Manager Backup, Recovery and Media Services OnDemand Archive Media Administration Media Administration Common Server Administration	🕀 📳 Management Central (Rdr400m.raleigh.ibm.com)	Name	Signed On User	Description
	My Connections My Connections Rdr400m.raleigh.ibm.com Basic Operations Work Management AFP Manager Backup, Recovery and Media Services OnDemand Archive OnDemand Archive Media Administration Media Administration Common Server Administration	Rdr400m.raleigh.ibm.com		М

Click on Report Definitions, the right panel of the window will be updated with of list of OnDemand report definitions.

				Ø iSeries Navigator
				File Edit View Help
1			My Connections	Environment: My Connections
	M	Signed On User Dbryant	Name	Management Central (Rdr400m.raleigh.ibm.com) My Connections Rdr400m.raleigh.ibm.com Basic Operations Work Management AFP Manager Backup, Recovery and Media Services OnDemand Archive OnDemand Archive OnDemand Archive Migration Policies Screen Overlays Media Administration Common Server Administration
				Migration Policies Migration Policies Screen Overlays Media Administration Common Server Administration 1 - 1 of 1 objects

Right click on one of the report definitions, as shown below, and select **New Report Definition** from the context menu.

rile calt view neip						
Environment: My Connections	Rdr400m.raleigh	n.ibm.com: Re	eport Definiti	ons		
Management Central (Rdr400m.raleigh.ibm.com) My Connections Rdr400m.raleigh.ibm.com Basic Operations Work Management AFP Manager Backup, Recovery and Media Services OnDemand Archive OnDemand Archive OnDemand Archive Administration Report Definitions Report Groups Migration Policies Screen Overlays Media Administration Ommon Server Administration	Report AFPINV00 CHECKSTM CHECKS00 CHECKS01 CHECKS02 CHECKS03 CHECKS04 CHECKS05 CHECKS06 CR01 CR01 CR01 CR03 CR04 CR04	Version New Report New Based Delete Properties Test report 01 01 01 01 01 01 01	Type t Definition. On DOC DOC DOC DOC DOC DOC DOC DOC	Data Type S R R R R R R R R R R OTHER OTHER OTHER OTHER OTHER OTHER	Description AFP INVOICES OND00 Check Statements CHECK STATEMENTS O Check Statements - OND0 Checking Statements CHECK STATEMENTS Checking Statement Repor Check Statements - OND0 CHECKING STATEMENTS PROJECT COST REPORT PROJECT COST REPORT PROJECT COST REPORT Project Cost Report	

The window shown below will be displayed to begin creating the report definition.

eneral	?
Report name:	
Version:	0 🕂
Report type:	DOC
Data type:	OTHER -
Input record length:	
Description:	
1	Locate

Enter the report definition inf	ormation as shown below:
---------------------------------	--------------------------

neral			?
Report name:		ANYSKOFA	XR
Version:		1 🕂	
Report type:		ANYS	•
Data type:		IFS	•
Input record length:		0 🔅	
Description:			
AnyStore - Kofax Report D	efinition		Locate

Click on the Next button.

rchive	?
Migration policy:	D900PTICAL -
Report group:	ANYSKOFAX -
Compression	
📕 Imbedded keys	
Combine report occurrences	
🖲 Do not combine	
C Maximum size	
C Limit size to:	
< <u>B</u> ack	Next > Cancel

Select a migration policy, then select the report group created earlier in this chapter. **DO NOT** select compression, since Ascent Capture normally stores images in compressed TIFF. If you select compression, OnDemand processing times will increase when storing and retrieving these images and, in most cases, compressing an already compressed image causes it to increase in size, not decrease.

Click on the Next button to display the Retrieval dialog (not pictured). The defaults are fine, so click on the Next button to display the Exits dialog (not pictured). The defaults are fine here, since you will not be using a Viewer Exit Program, so click on the Next button to display the Keys dialog. All the key definitions should be copied over from the Report Group. If they are not, enter the key definitions now by clicking on the key number and then on the Change button. Use the same key names and attributes as described on page 0.

1	Encounter	Yes	Change
2	History #	Yes	
3	Last Name	Yes	Clear
4 5	Hap	Tes Vec	
	Client viewer quer	y field definitions	

After all the keys have been defined, click on the Next button to display the Client - General dialog.

ient - General		?
Code page:	37	
Rotation:	▼ degrees clockwise	
Object class:	Extension:	
Paper size:	BMP GIF PCX	•
Show report in folder list	PDF	
F Merge overprinted lines	TIFF JEIF	
Query fields:	Hit list fields:	
Encounter History # Last Name Tab Hospital	Date(Desc) Encounter(Asc) History #(Asc) Last Name(Asc) Tab(Asc) Tab(Asc)	
	Change field lists	
	< <u>B</u> ack <u>N</u> ext > Ca	ancel

Select TIFF as the object class, the click on the Next button to reach the Client -Public Views dialog, then click on the Finish button to create the report definition.

Press the F5 key to refresh the list of report definitions.

Environment: My Connections	Rdr400m.raleigh.ibm.com: Report Definitions				
🗄 🏽 Management Central (Rdr400m.raleigh.ibm.com)	Report	Version	Туре	Data Type	Description
My Connections	AFPINV00	01	DOC	AFPDS	AFP INVOICES OND00
Rdr400m.raleigh.ibm.com Basic Operations Work Management	ANYSKOFAXR	01	ANYS	IFS	AnyStore - Kofax Report
	CHECKSTMTS	01	DOC	OTHER	Check Statements
	CHECKS00	01	DOC	OTHER	CHECK STATEMENTS O
AFP Manager	CHECKS01	01	DOC	OTHER	Check Statements - ONDO
Backup, Recovery and Media Services	CHECKS02	01	DOC	OTHER	Checking Statements
日間2 OnDemand Archive Advisionation	CHECKS03	01	DOC	OTHER	CHECK STATEMENTS
	CHECKS04	01	DOC	OTHER	Checking Statement Repo
Report Croups	CHECKS05	01	DOC	OTHER	Check Statements - ONDO
Migration Policies	CHECKS06	01	DOC	OTHER	CHECKING STATEMENTS
I Screen Overlays	CR00	01	DOC	OTHER	PROJECT COST REPORT
	CR01	01	DOC	OTHER	PROJECT COST REPORT
E Server Administration	CR03	01	DOC	OTHER	PROJECT COST REPORT

The new ANYSKOFAXR report definition now appears in the report definitions list.

Creating an Image IFS Subdirectory

During the installation of the 5799GEQ product, an IFS directory is created on the iSeries called ASCENT, which is the \ASCENT directory when viewed from a Client PC. Any IFS directory can be used, but it must match the subdirectory specified in the Ascent Capture Release Setup image directory field.

Multiple Scan/Release Workstations

To have multiple Scan/Release workstations, each workstation **MUST** place its images into a separate iSeries directory. It is recommended that a subdirectory be created for each Scan/Release workstation under the ASCENT directory, using the Ascent Capture Workstation ID as the directory name.

To determine your Ascent Capture Workstation ID, run the Ascent Capture Database Utility, DBUtil.exe. This program is located in the directory C:\Program Files\Ascent\Bin.

2	Ascent Capture - Database U	tility			
File	Help				
C	Database SecurityBoost Ic		Batch Information Editor	Repair and Compact	11
	 Standard SQL Server 				
	Server <u>n</u> ame: <u>D</u> atabase name:			Y	

After the Database Utility window opens, click on the Identification tab.

🔛 Ascent Capture - Database Utility 🛛 🛛 🔀					
File Help					
Database SecurityBoost Identification Batch Info Site Information Site GUID: [{3C64ACA3-830D-4701-8862-C0C03EA3D755} Site Name (Retwoor 1 and 22 above ten);	This information identifies your Ascent Capture installation. To change the information, you must close the Ascent Capture				
Site ID (Between 1 and 9999): 7	Administration module and process all batches in the system through completion.				
Station Information Station ID (Between 1 and 32 characters): SCAN01	This value identifies your Ascent Capture station.				
	Help				

The identification tab allows you to view, and change if necessary, the Site Name, Site ID, and Station ID.

To create image directories for two different Scan/Release workstations, called SCAN01 and SCAN02, use the following OS/400 commands:

MKDIR DIR('/ASCENT/SCAN01') DTAAUT(QRDARS400) OBJAUT(*NONE)

MKDIR DIR('/ASCENT/SCAN02') DTAAUT(QRDARS400) OBJAUT(*NONE)

The data authority parameter **MUST** be used to secure access to the ASCENT folders to only authorized OnDemand for iSeries users. The QRDARS400 authorization list is used by OnDemand for iSeries to specify who has access to OnDemand archived objects. Each OnDemand for iSeries user should be added to the QRDARS400 authorization list using the RDARSRPT menu, option 10.

For further information about OnDemand for iSeries security, look in Chapter 4 of the *OnDemand for iSeries Installation Guide*, SC41-5333.
Chapter 3. Setup Tasks - Workstation

The following instructions describe a Standalone implementation of Ascent Capture in which the Server and all Queues are installed and operated from the same PC. Instructions for expanding the implementation to a Server PC with separate client PCs for each processing Queue are included in *Getting Started with Ascent Capture*.

Prerequisite Software

The following software is required on the workstation. Refer to product specific documentation for installation and setup.

- Microsoft Windows 98/2000/XP
- IBM iSeries Access V5 (5722-XE1)
- Kofax Ascent Capture V5.0 or higher

Install and Setup Integration Software on the Workstation

Create an iSeries Connection using iSeries Access

Create a connection to the iSeries. The connection is communication protocol independent.

Create an ODBC Data Source

Perform the following steps to create an ODBC Data Source: **Note:** The windows shown in this example are from iSeries Access V5R2 and Microsoft Windows XP. Other versions of Client Access and Windows will be similar.

- Click on Start > Control Panel > Administrative Tools
- Double click on the Data Sources (ODBC) icon.
- From the System DSN tab, click on the Add button.

ODBC Data Source A	Administrat	or		? 🗙
User DSN System DSN System Data Sources: Name Driver CBA_EH_DB Microsoft CBA_TL_DB Microsoft	File DSN Di	r (*.mdb) r (*.mdb)	Connection Poo	Add Remove
An ODBC System data source stores information about how to connect to the indicated data provider. A System data source is visible to all users on this machine, including NT services.				
	ОК	Cancel	Apply	Help

• From the list, select Client Access ODBC Driver (32 bit), then click on Finish.

Create New Data Source		X
	Select a driver for which you want to set up a data so Name Client Access ODBC Driver (32-bit) Driver da Microsoft para arquivos texto (*.bd; *.csv) Driver do Microsoft Access (*.mdb) Driver do Microsoft Base (*.dbf) Driver do Microsoft Paradox (*.db) Driver do Microsoft Paradox (*.db) Driver para o Microsoft Visual FoxPro INTERSOLV OEM 2.12 32-BIT SQLServer INTERSOLV OEM 2.11 22 BIT INECODMIX	ource. 9 ■ 4 4 4 1 2 3 >
	< Back Finish Ca	incel

• Type a Data Source name (in this example: AnyStore) and description. Select your iSeries System - RDR400M in this example

		Diagnostic
Data source name: AnyStore		
Description:		
∣iSeries Access for Windows ODBC o System:	data source	
	Connection Options	
RDR400M.RALEIGH.IBM.		

• Click on the Server tab and type QRDARSK as the default library.

ies Access for Windows ODBC Setup	?
neral Server Packages Performance Language Catalog Translation Diagnostic	
Naming convention:	
SQL naming convention (*SQL)	
SQL default library:	
QRDARSK	
Library list	

• Click on the Translation tab and select the checkbox for *Convert binary data* (*CCSID 65535*) to text.



Click on OK to save.

🗿 ODBC Data Source Administrator	? 🗙			
User DSN System DSN File DSN Drivers Tracing Connection Po System Data Sources:	ooling About			
Name Driver AnyStore iSeries Access ODBC Driver CBA_EH_DB Microsoft Access Driver (*.mdb) CBA_TL_DB Microsoft Access Driver (*.mdb)	Add Remove Configure			
An ODBC System data source stores information about how to connect to the indicated data provider. A System data source is visible to all users on this machine, including NT services.				
OK Cancel Apply	Help			

• Click on OK to close the ODBC Data Source Administrator.

Map OS/400 Network Drive

Use Windows Explorer to map the OS/400 integrated file system to a network drive on the PC as follows:

- Start Windows Explorer, select Tools, Map network drive.
- Select a drive letter (in this example: Z). This letter may be different from what is shown here, but it must match the name specified in the Release Setup form.

Map Network Drive		$\overline{\mathbf{X}}$
	Window: and assi access t Specify t that you Drive: Folder:	s can help you connect to a shared network folder gn a drive letter to the connection so that you can he folder using My Computer. the drive letter for the connection and the folder want to connect to: Z: Vrdr400m.raleigh.ibm.com Example: \\server\share Reconnect at logon
		Connect using a <u>different user name</u> .
		network server.
		< Back Finish Cancel

- When assigning the drive, it is required to point it to the OS/400 root directory (in this example: \\rdr400m.raleigh.ibm.com\root).
- Check the *Reconnect at logon* setting (Reconnect at startup for Windows 98).

Install IBM OnDemand for iSeries Release Script

Use the following procedure to install the release code specific to OnDemand for iSeries:

- Map a network drive to the OS/400 root directory.
- Using Windows Explorer, navigate to the \QIBM\ProdData\RDARS\Kofax subdirectory of the mapped network drive.
- Double click on the setup.exe file.
- Follow the on-screen instructions to complete the installation.

Remove IBM OnDemand for iSeries Release Script

If for any reason you need to remove the IBM OnDemand for iSeries Release code from a workstation, follow the steps below:

Use the following procedure to remove the OnDemand for iSeries 32-bit Release code from the workstation:

- Click on the Start > Settings > Control Panel.
- Double Click on the Add/Remove programs icon.
- Select IBM OnDemand for iSeries Release (32-bit) and click on the Add/Remove button.
- Follow the on-screen instructions to complete the removal.

Ascent Capture Setup

Several things need to be defined within Ascent Capture for the AnyStore integration environment:

- Index Field Types
- Document Class
- Form Type
- Batch Class

Our example is not meant to describe all of the features of Ascent Capture. Ascent Capture is highly configurable and has many features beyond those utilized in this example.

Create Index Field Types

Index Field Types can be thought of as models for defining index fields. Index Field Types can be used to generically define fields that can be used across applications. Fields like Names, Addresses, Telephone Numbers and other fields that have consistent formats can be defined once and then new index fields can be defined based upon the Index Field Types.

The following table lists the Index Field Types used in this example.

Ascent Capture Field Type Name	Max Length	Data Type	Comments
ENCOUNTER-25	25	CHARACTER	Encounter
HISTORY-NO-20	20	CHARACTER	History number

PATIENT-LAST-NAME-20	20	CHARACTER	Patient's last name
TAB-20	20	CHARACTER	Tab
HOSPITAL-NO-15	15	CHARACTER	Hospital Number
VERSION-2	2	CHARACTER	Report version as defined in OnDemand for iSeries setup. If not provided, then default is 01.
DATE	n/a	DATE	If not provided the default is the OS/400 system date. Date is converted to an ISO date (YYYY-MM-DD) during Release.
COMMENT-50	50	CHARACTER	If not provided, then default is the report name description as defined in OnDemand for iSeries report definition.

Detailed instructions for creating Index Field Types are included in *Getting Started* with Ascent Capture.

To create Index Field Types, follow these steps:

Click on Start > Programs > Ascent Capture 6.0 > Administration.



The Ascent Capture Administration window is shown above.

Q Ascent Capture - Administration		
File Edit Scan View Scripts Tools Help		
		<u>×</u>
Batch Document Field Types	Software Import	3
New Field Type V Docking View Hide		
For Help, press F1		

Click on the Field Types tab. Right click in the window beneath the Field Types tab and select New Field Type.

Create Field	Туре 🛛 🔀
General Valu	es
Name:	Encounter-25
Description:	Encounter
Dictionary:	Browse
Data type:	CHAR
	Number of characters: 25
	Save Close Help

Enter the Field Type information as shown above and click on the save button to create the Field Type. Repeat the process to enter the remaining Field Types using the information below.

Field Type Name	Description	Data type	Number of Characters
Encounter-25	Encounter	CHAR	25
History-20	History Number	CHAR	20
Last-Name-20	Patient Last Name	CHAR	20
Tab-20	Tab	CHAR	20
Hospital-15	Hospital Number	CHAR	15
Version-2	Report Version	CHAR	2
Date	Posting Date	DATE	n/a
Comment-50	Run Comment	CHAR	50

Click on the Save button after entering the information for each Field Type. After saving the last Field Type, click on the Close button to return to the Administration window.

Secont Capture - Administration		
<u>Eile Edit S</u> can <u>V</u> iew Scripts <u>T</u> ools <u>H</u> elp		
		-
Batch Document Field Types	Software Import	
Comment-50		
Date		
Encounter-25		
History-20		
Hospital-15		
Last-Name-20		
Tab-20		
JUS Version-2		
For Help, press F1	I	

After creating the last field type, you should see all field types listed as shown above.

Create a Document Class

Each Document Class defines the index fields used to retrieve that kind of scanned image. Detailed instructions for creating Document Classes are included in *Getting Started with Ascent Capture*.

Q Ascent Capture - Administration		
File Edit Scan View Scripts Tools Help		
		<u>_</u>
Batch Document Field Types	Software Import	J
New Document Class V Docking View Hide		
For Help, press F1		

To create a document class, click on the Document tab. Right click in the window below the Document tab and select New Document Class.

ame: Al	VYSKOFAXR						
escription: Ar	iyStore - Kofax Imag	e Integration					
Vame	Field Type	Default	Required	Verify	Hidden	Sticky	Total

Enter a Document Class name and description. **Note:** The Document Class name should be the same as your OnDemand Report Definition Name.

Click on the New button to add index fields for this Document Class.

escription: AnyStore - Kofax Image Integration idex Fields: Name Field Type Default Required Verify Hidden Sticky Total Encounter Comment-50 False False False False False Comment-50 False False False False False False Comment-50 Field Type False F	ame: AN	YSKOFAXR					
Name Field Type Default Required Verify Hidden Sticky Total Encounter Comment-50 Image: Sticky False False False False False False False Comment-50 Image: Sticky Image: Sti	escription: An	yStore - Kofax Image Integration					
Encounter Comment-50 False Fal	Name	Field Type Default	Required	Verify	Hidden	Sticky	Total
	=ncounter	Comment-50 Date Encounter-25 History-20 Hospital-15 Last-Name-20 Tab-20	False	False	False	False	False

Enter an index field name that is unique for this Document Class, then tab to the Field Type column.

Click the down arrow to open the pull down menu and select Encounter-25. Repeat the process to enter the remaining Index Fields using the information below.

Index Field Name	Field Type Name
Encounter	Encounter-25
History Number	History-20
Patient Last Name	Last-Name-20
Tab	Tab-20
Hospital Number	Hospital-15
Report Version	Version-2
Posting Date	Date

lame: ANYSI	KOFAXR						
escription: AnySto	ore - Kofax Image	Integration					
ndex Fields:							
Name	Field Type	Default	Required	Verify	Hidden	Sticky	Total
Encounter History Number Patient Last Name Tab	Encounter-25 History-20 Last-Name-20 Tab-20		False False False False	False False False False	False False False False	False False False False	False False False False
Hospital Number Posting Date Report Version Run Comment	Hospital-15 Date Version-2 Comment-50	{Current Date}	False False False False	False False False False	False False False False	False False False False	False False False False
					N	ew	Dielete

After all of the Index fields have been created for the Document Class, click on the OK button.



The ANYSKOFAXR Document Class now appears in the Document window above.

Secont Capture - Administration		
File Edit Scan View Scripts Tools Help		
🟥 🕵 📑 🎿 🗙 😧 ⊘ 💿 🚈 🖻		*
Batch Document Field Types	Software Import	
ANYSKOFAXR New Document Class Delete Rename Validation Script Database Validation		
New Form Type Properties ✓ Docking View Hide		
For Help, press F1		

Each Document Class needs a Form Type defined. To create a Form Type for the ANYSKOFAXR Document Class, right click on ANYSKOFAXR and select New Form Type.

Create Form Type 🛛 🔀						
General Image	Page Level Bar Code					
Name:	ANYSKOFAXR					
Description: AnyStore - Kofax Image Form Type						
Document class: ANYSKOFAXR						
Fixed number of pages						
	1 🚊					
	OK Cancel Help					

Enter the Form Type information as shown above and click on OK.

Q Ascent Capture - Administration	_	
Eile Edit Scan View Scripts Tools Help		
🟥 🕵 🖹 😫 🗙 😧 🕐 🖾 🖾		*
Batch Document Field Types	Software Import	
For Help, press F1	Total Pages: 0	

Note the Form Type indented underneath the Document Class. Next you need to create a Batch Class.

Create a Batch Class

Batch Classes are composed of one or more Document Classes. A Batch Class defines the order of the Queues used to process the batch and the parameters specific to the Queues. Detailed instructions for creating Batch Classes are included in *Getting Started with Ascent Capture*.

Q Ascent Capture - Administration		
File Edit Scan View Scripts Tools Help		
		<u>_</u>
Batch Document Field Types	Software Import	3
New Batch Class Publish ✓ Docking View Hide		
For Help, press F1	Total Pages: 0	

To create a Batch Class, click on the Batch tab. Right click in the window below the Batch tab and select New Batch Class.

andrai Queu	les Separation at	id Form identification	Advanced			
<u>N</u> ame:		Priority: 5 🛨				
escription:	AnyStore - Kofax	Image Batch Class				
mage folder:	C:\Program Files	\Ascent\images				Browse
latch <u>F</u> ields:						
Name		Field Type	Default	Re	equired	Hidden
					New	Delete

Enter the Name and Description of the Batch Class

eneral Queues Separation and Form Identification	on Advanced	
A <u>v</u> ailable Queues		Selected Queues
Quality Control Recognition Server	Add >>	Scan
≝iverification ∰ OCR Full Text	<< <u>R</u> emove	
PDF Generator Release	Remove All	
	Properties	
		·
The QC module is used to rescan pages or docume	nts, validate form iden	trication, and edit the contents of batches.
Workflow agent: (none)		3

Click on the Queues tab to proceed.

eneral Queues Separation and Form I	dentification Advanced	Selected Queues
Quality Control	A <u>d</u> d >> << <u>R</u> emove Remove A <u>l</u> I <u>P</u> roperties	Scan Validation Release
Des <u>o</u> ription The Release module writes documents a	nd image files to permanent store	age.
Workflow agent: (none)		<u>.</u>

In this example, you will only use the Scan, Validation (Validation was known as Index in Ascent Capture 3) and Release Queues. The Scan queue is already included by default. Click once on the Validation queue to select it, then click on the Add button. Do the same for the Release queue. Your window should look the same as the window shown above.

In the Selected Queues pane, click once on the Scan queue to select it, then click on the Properties button.

Scan Prope	rties				
General Er Capture I C Scan Impor Permaner Profiles:	ndorsing Mode t nt Image Cleanup Kofax Scan)			Edit
Scanner	Support n code reader		☐ Bar coo	de reader	
			ок	Cancel	Help

In this example, you will not be scanning in an image, you will be importing an image file. Normally, you would set the Capture Mode to Scan. For this example, select the Import radio button and click OK. Click OK again to save the Batch Class.

You now have a Batch Class, Document Class, Form Type and Index Field Types. Since a Batch Class can contain multiple Document Classes, you must Insert the Document Class into your Batch Class.

😟 Ascent Capture - A	Administration					
File Edit Scan View Scripts Tools Help						
📓 🕵 🗒 👪	X 🛛 🕐 🐼 🖾		×			
Batch Document Field	d Types	Software Import	3			
	New Batch Class Delete Rename					
	New Document Class Insert Document Class					
	Export					
	Publish					
	Assigned User Profiles					
	Properties					
For Help, press F1	✓ Docking View Hide					

Right Click on the ANYSKOFAXR Batch Class and select Insert Document Class.

Insert Document Class	
ANYSKOFAXR	ок 📐
	Cancel
	Help

You are presented with a list of available Document Classes. Select ANYSKOFAXR and click OK.

Secont Capture - Administration		
<u>File E</u> dit <u>S</u> can <u>V</u> iew Scripts <u>T</u> ools <u>H</u> elp		
		*
Batch Document Field Types	Software Import	
<u></u>		
For Help, press F1		_ //

Now you can see the ANYSKOFAXR Document Class indented beneath the ANYSKOFAXR Batch Class.

OnDemand for iSeries 32-bit Release Script Setup

Ascent Capture has the capability to run a different Release Script program for each Document Class. For this reason, you must specify that the OnDemand for iSeries 32-bit Release Script program will be used for your example Document Class.

😫 Ascent Capture - Administration 📃 🗖 📔					
File Edit Scan View Scripts Tools Help					
📓 🕵 📑 📾 🗙 📎 ⊘ 🐼 🖾		*			
Batch Document Field Types	Software Import				
- ANYSKOFAXR					
ANYSKOFAXR Release Scripts Validation Script Database Validation					
Delete Remove Document Rename					
New Form Type					
Properties					
✓ Docking View Hide					
For Help, press F1		1			

Right click on the ANYSKOFAXR Document Class and select Release Scripts as shown above.

vailable Release Scripts			Assigned Release Script	5
Script Name Ascent Capture Database Ascent Capture Text DnDemand/400 32-bit Release	Version 6.0/6.0 6.0/6.0 3.0/3.0	Add >> 💦 << Remove Setup Upgrade	Script Name	Version

AnyStore Integration is provided by the OnDemand/400 32-bit Release Script.

Select OnDemand/400 32-bit Release and click on the Add button to run the Release Setup program.

Note: If you are modifying a Document Class which uses a Version 2 Release script, to use the OnDemand/400 32-bit Release script, you must remove the existing script before selecting the OnDemand/400 32-bit Release script. If you select the OnDemand/400 32-bit Release script and click run, without removing the existing script first, you will receive an error stating that there is a duplicate record in a database. This is an erroneous message. If the occurs, simply remove the existing

script, then select the OnDemand/400 32-bit Release script and press Add to continue.

OnDemand	400 32-bit Release Setup 🛛 🛛 🔀
Batch class:	ANYSKOFAXR
Document cla	ss: ANYSKOFAXR
Database	Table Settings Document Storage Image Format
Data <u>s</u> ourc name:	Browse
<u>U</u> ser name	
- -	
rassword:	
	OK Cancel Apply Help

Previously, you created an ODBC data source. Now you must select that data source and provide a User Name and Password which is authorized to access OnDemand for iSeries reports and databases.

Click on the Browse button to select the Data Source you created earlier.

Select ODBC Data Source	
MS Access Database Excel Files MS SQL Server6-Approach QDSN_Rdr400m.raleigh.ibm.com CBA_EH_DB CBA_TL_DB AnyStore	
	Cancel <u>H</u> elp

The list of predefined ODBC Data Sources Names (DSN) is presented. In this example choose AnyStore and click OK. You may be prompted to signon to OS/400 at this time. If so, enter your OS/400 userid and password and click on OK.

OnDemand/400	32-bit Release Setup	×	
Batch class:	ANYSKOFAXR		
Document class:	NYSKOFAXR		
Database Tabl	e Settings Document Storage Image Format		
		1	
Data <u>s</u> ource	AnyStore Browse		
nume.			
<u>U</u> ser name:	dbryant		
Password:			
		_	
	OK Cancel <u>Apply</u> <u>H</u> elp		

Enter a valid *User name* and *Password* for OnDemand for iSeries and click on the Table Settings tab to continue.

OnDemand/400 32-	bit Release Setup			×
Batch class: ANY	SKOFAXR			
Document class: ANY	SKOFAXR			
Database Table Sett	ings Document Storage	Image Format		
Index Values				
Table name:				•
Data	base Columns	Ind	lex Value	
Documents				_
Table <u>n</u> ame:	J			<u> </u>
Document <u>I</u> D:				-
Document path:				-
		ОКС	ancel	Apply <u>H</u> elp

Now you must specify which OnDemand AnyStore Integration files you will be updating with Document Index Values.

OnDemand	/400 32-bit F	elease Setup				X
Batch class:	ANYSKO	AXR				
Document cla	ass: ANYSKO	AXR				
Database	Table Settings	Document Storage	Image Format	1		
- index va	iues					
lable n	ame:	DADOKOADI COTOD			<u> </u>	
	Database	Columns		Index Value		
			, 		Ť	
Docume	nts					
Table <u>n</u>	iame:				•	
Docum	ent [D:				-	
Docum	ent path:				-	
			OK	Cancel	Apply	
			UK			sib.

Click on the drop down arrow in Table Name for Index Values. You will see only one selectable file called QRDARSK.QARLSSTOR. Select the QRDARSK.QARLSSTOR file.

OnDemand/400 32-bit Release Setup	$\overline{\mathbf{X}}$
Batch class: ANYSKOFAXR	
Document class: ANYSKOFAXR	
Database Table Settings Document Storage	mage Format
Index Values	
Table name: QRDARSK.QARLSSTOR	
Database Columns	Index Value
ANYSTORE_DOCID	
ANYSTORE_KEY1	
ANYSTORE_KEY2	
ANYSTORE_KEY3	
JANYSTORE_KEY4	
Documents	
Table <u>n</u> ame:	•
Document <u>I</u> D:	V
Document path:	y
	OK Cancel <u>Apply H</u> elp

The Database Columns fields will fill with names as shown above.

OnDemand/400 32-bit Release Setup	$\overline{\mathbf{X}}$		
Batch class: ANYSKOFAXR			
Document class: ANYSKOFAXR			
Database Table Settings Document Storage	Image Format		
Index Values			
Table name: QRDARSK.QARLSSTOR	_		
Database Columns	Index Value		
ANYSTORE_DOCID	<u> </u>		
ANYSTORE_KEY1			
ANYSTORE_KEY2	ANYSTORE_KEY2		
ANYSTORE_KEY3			
ANYSTORE_KEY4			
Table name: QRDARSK.DOCUMENTS	•		
Document ID: DOCUMENT_ID	•		
Document path: DOCUMENT_PATH			
	OK Cancel <u>Apply H</u> elp		

Let's select the Table Name for the Documents, by clicking the down arrow. You will only see the QRDARSK.DOCUMENTS table listed. Select the QRDARSK.DOCUMENTS table as shown above.

Now select the name of the AnyStore Integration database field into which the Ascent Capture Document ID will be placed. Clicking the down arrow in the Document ID field. You will only see the DOCUMENT_ID field listed. Select the DOCUMENT_ID field as shown above.

Next select the name of the AnyStore Integration database field into which the Ascent Capture Document Path will be placed. Clicking the down arrow in the Document Path field. You will only see the DOCUMENT_PATH field listed. Select the DOCUMENT_PATH field as shown above.

When the Release process executes, data values entered for the Ascent Capture Index fields are transmitted to the iSeries. Before the Release process can be run, you must instruct the Release code how to map the Ascent Capture index values to AnyStore key fields. The table below shows how AnyStore key fields should be mapped to the Ascent Capture index fields for your example Document Class.

AnyStore Integration Key Field Name	Ascent Capture Index Field Name	
ANYSTORE_KEY1	Encounter	
ANYSTORE_KEY2	History Number	
ANYSTORE_KEY3 Patient Last Name		
ANYSTORE_KEY4	Tab	
ANYSTORE_KEY5 Hospital Number		
ANYSTORE_VERSION	Report Version	
ANYSTORE_POSTING_DATE	Posting Date	
ANYSTORE_RUN_COMMENT	Run Comment	

Database Columns	Index Value
ANYSTORE_DOCID	
ANYSTORE_KEY1	
ANYSTORE_KEY2	
ANYSTORE_KEY3	
ANYSTORE_KEY4	- I - I - I - I - I - I - I - I - I - I

To begin mapping the fields click once in the index value column for ANYSTORE_KEY1. A context menu drop down button will appear. Click on the drop down button, as shown above.

OnDemand/400 32-bit Release Setup	$\overline{\mathbf{X}}$
Batch class: ANYSKOFAXR	
Document class: ANYSKOFAXR	
Database Table Settings Document Storage	Image Format
Index Values	
Table name: QRDARSK.QARLSSTOR	•
Database Columns	Index Value
ANYSTORE_DOCID	
ANYSTORE_KEY1	
ANYSTORE_KEY2	Document ID
ANYSTORE_KEY3	Index Fields Encounter
ANYSTORE_KEY4	Ascent Capture Values History Number
	Tab
Documents	Hospital Number
Table name: QRDARSK.DOCUMENTS	Posting Date
Document ID: DOCUMENT ID	Report Version
	Run Comment
Document path: DOCUMENT_PATH	<u> </u>
	OK Cancel <u>Apply H</u> elp

Move the mouse to the Index Fields menu option and select Encounter.

Continue mapping the AnyStore Integration database fields to the Ascent Capture Index Values until all have been mapped, as shown in the composite image below.

Do not map anything to the ANYSTORE_DOCID field. It will be ignored.

Table name: QRDARSKQARLSS	TOR
Database Columns	Index Value
ANYSTORE_DOCID	
ANYSTORE_KEY1	Encounter
ANYSTORE_KEY2	History Number
ANYSTORE_KEY3	Patient Last Name
ANYSTORE_KEY4	Tab
ANYSTORE_KEY5	Hospital Number
ANYSTORE_REPORT_NAME	
ANYSTORE_VERSION	Report Version
ANYSTORE_POSTING_DATE	Posting Date
ANYSTORE_RUN_COMMENT	Run Comment

By default, the Ascent Capture Document Class name will be mapped to the ANYSTORE_REPORT_NAME, so your Document Class name should be the same as your OnDemand Report Definition name. In this example, you have not mapped an Index Field to the ANYSTORE_REPORT_NAME, so ANYSKOFAXR will be used for the report name.

By default, if the value captured for ANYSTORE_VERSION is blank or no Index Field is mapped to ANYSTORE_VERSION, AnyStore will assume a version of 01.

By default, if the value captured for the ANYSTORE_POSTING_DATE is blank or no Index Field is mapped to ANYSTORE_POSTING_DATE, AnyStore will use the date that the AnyStore monitor on the iSeries archives the image for the posting date.

OnDemand/400 32-bit Release Setup	X
Batch class: ANYSKOFAXR	
Document class: ANYSKOFAXR	
Database Table Settings Document Storage Image Format	
Image Files	
Release directory: Browse	
□ <u>Skip first page</u>	
	-
OCR Full Text Files	
Release directory: Browse	
	-
OK Cancel Apply Hel	>

Click on the Document Storage Tab to continue.

On this tab you will select the directory on the iSeries where released images will be temporarily stored before being archived by the AnyStore monitor.

Browse for Folder
Select Image Release Directory
😑 🧝 root on 'rdr400m.raleigh.ibm.com' (Z:) 🔥
AFPSamples
E Ascent
bin
🗄 🖂 cmapar 📖
i i i i i i i i i i i i i i i i i i i
E mageSamples
🚽 🛁 🛗
OK Cancel

Click on the Browse button. In this example, you had previously mapped a network drive (Z:) to the root directory of the RDR400M system.

When, the 32-bit Release code was loaded on the iSeries, a new directory was automatically created called \ASCENT. You will use the \ASCENT directory as the temporary directory for your images.

Click on the '+' sign in front of the mapped network drive, Z: in this example, and then click on the ASCENT folder and click the OK button.

OnDemand/400	32-bit Release Setup	×
Batch class: Document class:	ANYSKOFAXR ANYSKOFAXR	
Database Table	Settings Document Storage Image Format	
Image Files —		
<u>R</u> elease directo	ry: Z:\ASCENT Browse	
Skip first pa	ge	
OCR Full Text F	iles	
Release dire <u>c</u> to	ry: Browse	
	OK Cancel <u>Apply H</u> elp	

Our *Image Files Release directory* is now displayed in the window as shown above. To specify the Image Format, click on the Image Format tab.

OnDemand/400 32-bit Release Se	tup	X
Batch class: ANYSKOFAXR		
Document class: ANYSKOFAXR		
Database Table Settings Document	Storage Image Format	
Release Image As		
Image file type: Multipage TI	FF - CCITT Group 4	
PDF Settings		
Output Format Type	PDF Header Links	
	Subject	
	Author	
English - United States	Keywords	
	Course Regions	Grientetien
	✓ Low <u>O</u> CR confidence	Rotate 0
	Word not in dictionary	Rotate 90
	Mixed case	Rotate 180
<u>R</u> estore Defaults	Low font confidence	F Rotate 270
	OK Cance	el <u>A</u> pply <u>H</u> elp

The *Image file type* defaults to Multipage TIFF - CCITT Group 4, which is compressed TIFF. Multipage TIFF - CCITT Group 4 is normally the best *Image file type*, it provides better performance because the images are compressed and require less storage space. For this example, you will use the default.

Click OK to exit to save the Release Script setup information. With the Release Script setup complete, you can now click on the Close button.

Before your new Batch Class can be used, you must publish the Batch Class.

😟 Ascent Capture - A	dministration		
File Edit Scan View	Scripts Tools <mark>Hel</mark> p		
🛃 🕵 📑 式 .	🗙 🔀 ⊘ 💿 🚈 !	国国國職職会のの「	_
Batch Document Field	d Types	Software Import	
	New Batch Class Delete Rename	66000	
	New Document Class Insert Document Class		
	Export		
	Publish		
	Assigned User Profiles		
	Properties		
For Help, press F1	✓ Docking View Hide		

To publish the Batch Class, right click on the ANYSKOFAXR Batch Class and select Publish.

It is always a good idea to validate the Batch Class before publishing it. Validation identifies possible errors in your Batch Class and also warns of possible problems that you may need to fix before publishing the Batch Class.

Publish		×
Batch Class ANYSKOFAXR	Last Published	Validate Publish Disable Select All Close
Results: Validating: ANYSKOFAXR Validating batch integrity Checking for errors 0 warnings: 0 errors ANYSKOFAXR validation co	ompleted.	

To validate the ANYSKOFAXR Batch Class, select it in the window pane and click on Validate. The Results pane will list any warnings or errors found in your Batch Class. If you had no warnings or errors, let's move on and publish the Batch Class.

ublish		
Batch Class	Last Published	Validate
ANTSKUFAAN	10/13/2003 8.42.00 AM	Publish
		Disable
		Select All
		Close
		Help
Results:		
Publishing: ANYSKOFAXF Validating batch integrity Checking for errors 0 warnings; 0 errors Publishing in progress Publishing successful: AN	3 YSKOFAXR	<u>.</u>
		N

To publish a Batch Class, select the Batch Class in the window and click on Publish. Any warnings or errors found in the Batch Class will be displayed in the Results window pane. If you did not receive any errors, close the Publish window by clicking on the Close button.

You have successfully created and published a Batch Class, so your setup is complete. To exit Ascent Capture - Administration, select the File pull down menu and click exit.

At this point, you would begin scanning or importing and indexing your documents. See the Kofax Ascent Capture documentation for details.

Chapter 4. Release Processing

Ascent Release Program

To release image documents to the iSeries:

- Start a iSeries Access connection to your iSeries
- Map your OS/400 network drive
- Start the Release program by double clicking on the Release icon in the Ascent Capture Folder. This program monitors for Ascent Capture batches that are ready to be released. This program should be started at the beginning of the day, and left to run unattended.

The Release program performs four major functions:

- Transfers image documents from Ascent Capture to an OS/400 IFS directory
- Updates a DB2 for iSeries database with the location of each image document
- Updates a DB2 for iSeries database with the indexes for each image document
- Deletes all successfully released document batches from Ascent Capture

	omation	Current Batch Progress				
latch Name:	10/13/2003 8:44:18 AM		Page	4	of	24
Judach Classes	ANIVEROFAND			16	%	
atch Class:	ANTSKUFAAR		Document	4	of	24
Current Documer	t Information					
ocument Class:	ANYSKOFAXR					
orm Type:	ANYSKOFAXR					
Event Log						
09:01:23 AM	Opened batch "10/13/2003 8:44: Opened document #1_class "AN)	18 AM", class "ANYSKOFAXR" (SKOFAXR " form "ANYSKOFAX	'B''			
00.01.27 AM	Released Document #1					
03.01.27 AM	Opened document #2, class "AN)	SKOFAXR," form "ANYSKOFAX	:R"			
09:01:27 AM	Beleased Document #2		R"			
09:01:27 AM 09:01:27 AM 09:01:28 AM 09:01:28 AM	Released Document #2 Opened document #3, class "AN1	SKOFAXR," form "ANYSKOFAX				
09:01:27 AM 09:01:27 AM 09:01:28 AM 09:01:28 AM 09:01:29 AM 09:01:29 AM	Released Document #2 Opened document #3, class "ANY Released Document #3 Opened document #4	SKOFAXR," form "ANYSKOFAX	'D"			
09:01:27 AM 09:01:27 AM 09:01:28 AM 09:01:28 AM 09:01:29 AM 09:01:29 AM 09:01:29 AM	Released Document #2 Opened document #3, class "ANY Released Document #3 Opened document #4, class "ANY Released Document #4	'SKOFAXR," form "ANYSKOFAX 'SKOFAXR," form "ANYSKOFAX	'R''			
09:01:27 AM 09:01:28 AM 09:01:28 AM 09:01:29 AM 09:01:29 AM 09:01:29 AM	Released Document #2 Opened document #3, class "AN) Released Document #3 Opened document #4, class "AN) Released Document #4	'SKOFAXR," form "ANYSKOFAX 'SKOFAXR," form "ANYSKOFAX	'R''			

When Release Processing is running, a windows similar to the one above will be displayed. Release status messages will be displayed in the Event Log window pane.

Chapter 5. AnyStore Processing

AnyStore Monitor

The AnyStore monitor is an OS/400 program which wakes up every 60 seconds and looks for batches of image documents to archive. If no documents have been delivered by the Release process, the monitor goes back to sleep for another 60 seconds. If a batch of documents have been delivered to the iSeries, the AnyStore monitor archives them into OnDemand for iSeries using AnyStore APIs. When all available batches of images have been archived, the monitor will go back to sleep.

The AnyStore monitor reads the indexes for each document within a batch and creates an OnDemand object for each OnDemand report and posting date combination found. In order to improve archival performance, up to 20 documents with the same report name and posting date will be archived within a single OnDemand object. When all available batches of documents have been archived, the monitor will go back to sleep. If less than 20 documents have been archived in the last OnDemand object created, the AnyStore monitor will leave the OnDemand object open when it goes back to sleep. If additional documents are delivered with the same OnDemand report name and posting date, they will be added to the open OnDemand object.

It is important to know that as long as the last OnDemand object remains open, the documents within it cannot be viewed. For this reason, the monitor uses an inactivity timer. When the monitor has been inactive for 5 minutes (default), it will automatically close the OnDemand object that is open. After the OnDemand object is closed, the documents within it can be viewed successfully.

It is also important to know that even though up to 20 images are combined in one OnDemand object, each individual image is still retrievable using the OnDemand Client.

Changing the Default Inactivity Time

The default inactivity time can be changed by creating a data area in the QRDARSK library named QRLSINACT. A sample command to create the data area is shown below (Note: The data area **MUST** be defined as TYPE(*DEC) LEN(3 0)):

CRTDTAARA DTAARA(QRDARSK/QRLSINACT) TYPE(*DEC) LEN(3 0) VALUE(10) TEXT('Inactivity Timer Data Area')

The example above will set the inactivity timer to a value of 10 minutes. If the AnyStore monitor has not archived anything in 10 minutes, it will close the OnDemand object that is presently opened. Once the OnDemand object is closed, the documents within the object can be viewed using the OnDemand Client.

The inactive time can be from 1 to 999 minutes. Once the data area has been created, the value can be changed using the CHGDTAARA or WRKDTAARA commands.

If the data area is not found by the monitor, or the value is less than 1, the default of 5 minutes will be used. The shorter the time, the sooner documents can be viewed. However, this can result in more OnDemand objects which can increase OnDemand Report Management Cycle processing times and optical storage backup times.

Starting the AnyStore Monitor

To start the indexing of documents to OnDemand for iSeries, run the STRMONANYS command. This command will automatically run the AnyStore monitor as a batch job. The command and it's parameters are shown in the figure below. More details are given in Appendix A. Commands.

```
START MONITOR FOR ANYSTORE (STRMONANYS)
Type choices, press Enter.
END DATE . . . . . . . *NONE
                             DATE (YYYYMMDD), *NONE, ...
MONITOR LOGGING . . . . . . . .
                                       *BASIC, *ENHANCED
                           *ENHANCED
                             *YES
                                       *YES, *NO
DELETE PROCESSED FILES . . . . .
                      Additional Parameters
SUBMIT TO BATCH . . . . . . . . *YES *YES, *NO
BATCH JOB NAME . . . . . . . . MONANYS
                                       Name
JOB DESCRIPTION . . . . . . . . . QRDARS400
                                       Name
                             QRDARS Name, *LIBL, *CURLIB
 LIBRARY . . . . . . . . . . .
                                                      Bottom
F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display
F24=More keys
```

A sample OS/400 command to add the AnyStore monitor to the OS/400 job scheduler is shown below. User QRDARS400 is required to ensure access to all necessary OnDemand report definitions.

```
ADDJOBSCDE JOB(STRANYSTOR) CMD(STRMONANYS SBMJOB(*NO))
FRQ(*WEEKLY) SCDDAY(*MON *TUE *WED *THU *FRI)
SCDTIME(`08:00:00') USER(QRDARS400) TEXT(`Start OnDemand
AnyStore Monitor')
```

Ending the AnyStore Monitor

The AnyStore Monitor program **MUST** be ended by running the ENDMONANYS command. If the monitor is ended in any other way, there is a possibility that documents will not be retrievable. The command and it's parameters are shown in the figure below.

END MONITOR FOR ANYSTORE (ENDMONANYS)

```
F3=Exit F5=Refresh F12=Cancel F13=How to use this display F24=More keys
```

No parameters to show; press Enter to run, F3 to exit.

A sample OS/400 command to add the end monitor to the OS/400 job scheduler is shown below.

```
ADDJOBSCDE JOB(ENDANYSTOR) CMD(ENDMONANYS) FRQ(*WEEKLY)
SCDDAY(*MON *TUE *WED *THU *FRI) SCDTIME(`17:00:00')
USER(QRDARS400) TEXT(`End OnDemand AnyStore Monitor')
```

Chapter 6. Troubleshooting and Error Recovery

Error Categories

Errors can occur in several categories:

- Ascent Capture errors, which include all errors from the point of scanning through the successful release of the documents and indexing information within the batch and the subsequent automatic deletion of the batch from the Ascent Capture system.
 - Ascent Capture errors are handled by the Ascent Capture product. See Appendix C in *Getting Started with Ascent Capture* for additional information about troubleshooting Ascent Capture errors. You may also want to visit the Ascent Capture technical support Web site at <u>http://www.kofax.com</u>.
- 2. OnDemand for iSeries Release
 - ODBC errors
 - Client Access errors
 - OS/400 Host Server support
 - Database 2/400
- 3. Indexing data edit checks performed prior to calling the AnyStore indexing APIs. There are three edit checks that are performed with the following messages recorded if they occur:
 - If document id or path is blank, the message; "RDR0067 = Field cannot be blank" is issued.
 - If the report name is blank, the message; "RDR0001 = The report definition not found" is issued
 - If all of the five keys field are blank, the message; "RDR0135 = At least one key value must be specified" is issued

Edit check errors are processed and reported in the same way as AnyStore indexing errors as described below.

- 4. AnyStore archiving errors, which include all errors that occur in the AnyStore monitor when calling the AnyStore APIs. Also included are errors that are returned from user exit programs.
 - If errors occur during archival, then an error message is written to the OS/400 joblog and one record is written to the QARLSLOG file, the QARLSTLOG file, and the QARLSEXCPT file.
 - The QARLSLOG file contains the indexing information, the error message id and any reason code information. See appendix D for assistance in displaying an AnyStore error message description.

The QARSLOG file can be displayed using Query, the Data File Utility, or the display physical file member (DSPPFM) command.

An enhanced log file is now available, QARLSTLOG. The QARLSTLOG file can be displayed using the command DSPLOGANYS. The command and it's parameters are shown in the figure below.

	DISPLAY	LOG FOR ANYS	IORE (DSPLOGANYS)	
Type choices, press 1	Enter.			
LOG ENTRY TYPE	•••	*ALL *ALL	*ALL, *ERRORS, *PROCESSED	
DOCUMENT IDENTIFIER		. *ALL		
FROM DATE TO DATE	· · ·	*AVAIL *CURRENT	DATE (YYYYMMDD), *AVAIL, DATE (YYYYMMDD), *CURRENT	
RUN DATE RANGE:				
FROM DATE	• • •	*AVAIL	DATE (YYYYMMDD), *AVAIL,	•
TO DATE		*CURRENT	DATE (YYYYMMDD), *CURRENT	
'3=Exit F4=Prompt F!	5=Refresh	1 F12=Cancel	Bottom F13=How to use this displa	y
24=More keys				,
	Type choices, press P LOG ENTRY TYPE REPORT NAME DOCUMENT IDENTIFIER DOCUMENT DATE RANGE: FROM DATE TO DATE RUN DATE RANGE: FROM DATE TO DATE 3=Exit F4=Prompt F! 24=More keys	DISPLAY Type choices, press Enter. LOG ENTRY TYPE REPORT NAME DOCUMENT IDENTIFIER DOCUMENT DATE RANGE: FROM DATE TO DATE RUN DATE RANGE: FROM DATE TO DATE 3=Exit F4=Prompt F5=Refresh 24=More keys	DISPLAY LOG FOR ANYS Type choices, press Enter. LOG ENTRY TYPE *ALL REPORT NAME *ALL DOCUMENT IDENTIFIER *ALL DOCUMENT DATE RANGE: FROM DATE *AVAIL TO DATE *AVAIL RUN DATE RANGE: FROM DATE *AVAIL TO DATE *CURRENT 3=Exit F4=Prompt F5=Refresh F12=Cancel 24=More keys	DISPLAY LOG FOR ANYSTORE (DSPLOGANYS) Type choices, press Enter. LOG ENTRY TYPE *ALL *ALL, *ERRORS, *PROCESSED REPORT NAME *ALL NAME, GENERIC*, *ALL DOCUMENT IDENTIFIER *ALL DOCUMENT DATE RANGE: FROM DATE *AVAIL DATE (YYYYMMDD), *AVAIL, TO DATE *CURRENT DATE (YYYYMMDD), *CURRENT RUN DATE RANGE: FROM DATE *AVAIL DATE (YYYYMMDD), *AVAIL, TO DATE *CURRENT DATE (YYYYMMDD), *AVAIL, Bottom 3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this displa 24=More keys

The DSPLOGANYS allows you to specify various parameters to reduce the numbers of messages displayed. These parameters, and some of their uses, include:

- LOG ENTRY TYPE Show only error messages, or show only processed messages
- REPORT NAME Show only messages for a specific report, or a set of reports beginning with a generic name.
- DOCUMENT IDENTIFIER Show only messages related to a specific document, or a set of documents beginning with a generic name. This can be useful if your document ids are prefixed by the name of the scanning workstation. For example, specifying SCAN01* would display messages for all document identifiers scanned at the SCAN01 workstation. This capability is dependent on how you configure Kofax Ascent Capture.
- The QARLSEXCPT file contains only the indexing information. This file can be corrected using the Data File Utility.
- After the QARLSEXCPT file has been corrected, program QRLSRESET can be called to reset the files for reprocessing.
- Before running the QRLSRESET program, be sure that the AnyStore Monitor has been stopped.
- To run the QRLSRESET program enter the following command:

CALL PGM(QRDARSK/QRLSRESET)

When the files are reset, the QARLSEXCPT and QARLSLOG files will be cleared.

After the files have been reset, restart the AnyStore monitor.

Information Needed Before Contacting Technical Support

- 1. What version of Client Access is being used? (Click on Start > Programs > IBM iSeries Access for Windows > iSeries Access for Windows Properties and record the version, release, modification level and service level installed.)
- 2. What release of OS/400 is being used? (Use GO LICPGM at the OS/400 command line and select option 10, then press F11 to view the installed release.)
- What cumulative PTF package is applied on the OS/400? (Use the OS/400 DSPPTF command to determine this.) See PSP report for the appropriate version of OS/400 to determine the latest available cumulative level for the release of OS/400. These are PTF cover letters for PTFs SF98vrm (vrm = version, release, modification level), eg. SF98520 for V5R2M0.
- 4. What PTFs are installed for OnDemand? (Use the command DSPPTF 5722RD1 to determine this.) Verify that the most current AnyStore PTF is installed.
- 5. What version of Windows is being used? 98/2000/XP? What service level of Windows is applied? Windows 98 Service Pack 1, Windows 98 SE, Windows 2000 Service Pack 1-4, Windows XP Service Pack 1? (Click on Start > Settings > Control Panel > System and record the Windows product installed and its version information listed on the general tab.
- 6. What version of Microsoft ODBC support is installed? (Click on Start > Settings > Control Panel > Administrative Tools > Data Sources (ODBC) > About tab and then record all version levels listed.) At the time this guide was published, the current version available from the Microsoft web site is 3.520.9030.0.
- 7. What version of the release code is being used? (Open up the Release Setup window and select the Help pull down menu, then select *About* and record the version.)
- 8. What version of Kofax Ascent Capture is installed? The 32-bit OnDemand Release Script will work with Kofax Ascent Capture version 5 or higher. Earlier versions are no longer supported by Kofax.
- 9. ODBC is supported by a QZDASOINIT host server job under the QSERVER subsystem. To view the joblog for this job do the following:
 - WRKACTJOB SBS(QSERVER)
 - Press F14 to include hidden jobs.
 - Find the QZDASOINIT job(s) and do an option 5 and then option 10 to view the joblog. There may be more than one of these jobs. To find the correct job, look for a message in the joblog indicating which user profile is being serviced.
 - After finding the correct job, look through the joblog for errors. And optionally, use the job name information to print the joblog for faxing to IBM OnDemand Technical Support.
- 10. Can the user map a network drive to the iSeries? If a network drive is not mapped to the iSeries the scanned objects can not be moved to the iSeries, and the release process will fail on the PC. Network drives is supported by a QZLSFILE server job under the QSERVER subsystem. To view the joblog for this job do the following:
 - WRKACTJOB SBS(QSERVER)

- Press F14 to include hidden jobs.
- Find the QZLSFILE job(s) and do an option 5 and then option 10 to view the joblog. There may be more than one of these jobs. To find the correct job, look for a message in the joblog indicating which user profile is being serviced.
- After finding the correct job, look through the joblog for errors. An optionally, use the job name information to print the joblog for faxing in to development.
- 11. The user logging on the Client Access must be authorized to OnDemand. Check by entering GO ONDEMAND, then option 1, then option 10 to view the authorization list and verify that the user is listed with at least *CHANGE authority.
- 12. End the monitor job by entering ENDMONANYS. Check the file QRDARSK/QARLSTLOG file for entries using the command DSPLOGANYS. Find the error code and take the appropriate action to resolve. After resolving the problem, call program QRDARSK/QRLSRESET to move the error records back into the database files. Start the monitor job by entering STRMONANYS.

Chapter 7. User Exit Programming

There is a program on the iSeries that performs OnDemand for iSeries archiving for each document transferred from the Ascent Capture to the iSeries. The indexing program has an Inbound User Exit, QRLSEXIT01, and an Outbound User Exit, QRLSEXIT02. In each case a data structure is passed to a stub program that currently performs no processing except returning to the calling program. The stub programs can be replaced or modified to perform customer-specific processing.

Field Name	Size	Status	Initial Offset	Comments
DOCUMENT_ID	15 Char	Unique key	1	Generated by the Ascent Capture software at time of release. This field contains the Ascent Capture Workstation ID (7) and Document ID (8). Reserved. No need for User Defined relationship to this field.
KEY_1	25 Char	Optional	9	AnyStore indexing key field 1. Default is Blanks.
KEY_2	20 Char	Optional	34	AnyStore indexing key field 2. Default is Blanks.
KEY_3	20 Char	Optional	54	AnyStore indexing key field 3. Default is Blanks.
KEY_4	20 Char	Optional	74	AnyStore indexing key field 4. Default is Blanks.
KEY_5	15 Char	Optional	94	AnyStore indexing key field 5. Default is Blanks.
REPORT_NAME	10 Char	Required	109	AnyStore report name as defined in OnDemand for iSeries setup.
VERSION	2 Char	Optional	119	AnyStore report version as defined in OnDemand for iSeries setup. If not provided then default is 01.
POSTING_DATE	10 Char	Optional	121	If not provided, then default is OS/400 system date.
RUN_COMMENT	50 Char	Optional	131	If not provided, then default is blanks.

The data structure passed to both User Exit programs is as follows:

Inbound User Exit - QRLSEXIT01

The Inbound User Exit program, QRLSEXIT01, is called once for each document processed prior to indexing being performed. A typical application for the Inbound User Exit is to read a customer database based on a single index value and return values in other fields that will be used for indexing to OnDemand for iSeries.

The source code for the exit program is found in file QSAMPLES in library QRDARSK. Member QRLSEXIT1C in QSAMPLES contains a COBOL sample exit program. Member QRLSEXIT1R contains an RPG sample exit program. When compiled, the program should be named QRLSEXIT01 and should be placed in the QUSRRDARS library.

Outbound User Exit - QRLSEXIT02

The Outbound User Exit program, QRLSEXIT02, is called once for each document processed after indexing has been performed. A typical application of the Outbound User Exit is to write the indexing information to a log file.

The source code for the exit program is found in file QSAMPLES in library QRDARSK. Member QRLSEXIT2C in QSAMPLES contains a COBOL sample exit program. Member QRLSEXIT2R contains an RPG sample exit program. When compiled, the program should be named QRLSEXIT02 and should be placed in the QUSRRDARS library.

Chapter 8. Commands

Commands

The following commands are added to the AnyStore Integration Release Script feature by PTF SF64363

STRMONANYS

This command starts the AnyStore monitor running on the iSeries. (This command replaces the call to the QRLSSTART program that was used previously.)

	START MONITOR F	FOR ANYSTORE (S	STRMONANYS)	
Type choices, press	Enter.			
END DATE		*NONE	DATE (YYYYMMDD), *NON	ſΕ
TIME TO END		235500	Time	
MONITOR LOGGING .		*ENHANCED	*BASIC, *ENHANCED	
DELETE PROCESSED FI	LES >	*NO	*YES, *NO	
PATH FOR PROCESSED	IFS FILES	'/ASCENT/PROCI	ESSED/'	
	Additior	nal Parameters		
SUBMIT TO BATCH .		*YES	*YES, *NO	
BATCH JOB NAME		MONANYS	Name	
JOB DESCRIPTION .		QRDARS400	Name	
LIBRARY		QRDARS	Name, *LIBL, *CURLIB	
		_	Bottom	
F3=Exit F4=Prompt F	5=Refresh F12=Ca	ancel F13=How t	to use this display	
\F24=More keys				

The parameters for the command are:

End Date - The date to end the monitor (defaults to *NONE like STRMONRDAR). This works the same as the STRMONRDAR end date.

Time to end - The time of day that the monitor should automatically end (defaults to 235500 like STRMONRDAR). This works the same as the STRMONRDAR time to end.

Monitor logging - This enables either the new enhanced logging (Default) or the old (basic) logging. The QRLSSTART program has been changed to provide the old logging if it is called without parameters, the way that it currently works today, so that customers who call the QRLSSTART program on their job scheduler will not be broken when the PTF is applied. If you want to get the enhanced logging you must use the STRMONANYS command.

Delete processed files - This enables you to save processed IFS files in a "processed" directory. By default it deletes the files when they are successfully archived as the monitor does today. If the *NO option is specified, another prompt is displayed which allows you to specify the directory for processed files to moved to, by default it is /ASCENT/PROCESSED/. The /ASCENT/PROCESSED/ directory is created during installation of PTF SF64363.

Submit to batch - enables the monitor to be submitted to batch. The default is to submit it to batch like STRMONRDAR.

Batch job name - Allows you to specify the name of the monitor job when it is submitted to batch, making it easier to identify using the WRKACTJOB command. The default job name is MONANYS.

Job description - The job description used when the job is submitted to batch. The default job description is QRDARS/QRDARS400.

ENDMONANYS

This command ends the AnyStore monitor running on the iSeries. (This command replaces the call to the QRLSEND program that was used previously.) The AnyStore Monitor program **MUST** be ended by running the ENDMONANYS command. If the monitor is ended in any other way, there is a possibility that documents will not be retrievable. The command has no parameters.

```
END MONITOR FOR ANYSTORE (ENDMONANYS)
```

```
F3=Exit F5=Refresh F12=Cancel F13=How to use this display F24=More keys
```

```
No parameters to show; press Enter to run, F3 to exit.
```

DSPLOGANYS

This command displays the new AnyStore monitor enhanced transaction log, stored in file QARLSTLOG.

```
DISPLAY LOG FOR ANYSTORE (DSPLOGANYS)
 Type choices, press Enter.
                                        *ALL, *ERRORS, *PROCESSED
LOG ENTRY TYPE . . . . . .
                            *ALL
REPORT NAME . . . . . . .
                                        NAME, GENERIC*, *ALL...
                            *ALL
DOCUMENT IDENTIFIER . . . . .
                                *ALL
DOCUMENT DATE RANGE:
  FROM DATE . . . . . . .
                            *AVAIL
                                       DATE (YYYYMMDD), *AVAIL, ...
                            *CURRENT
  TO DATE . . . . . . . .
                                        DATE (YYYYMMDD), *CURRENT
RUN DATE RANGE:
                            *AVAIL
                                        DATE (YYYYMMDD), *AVAIL, ...
  FROM DATE . . . . . . .
  TO DATE
                            *CURRENT
                                         DATE (YYYYMMDD), *CURRENT
           . . . . . . . .
                                                             Bottom
F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display
F24=More keys
```

The parameters for the command are:

Log entry type - This can be either entries for errors, entries for successfully processed files or ALL entries. The default is to display all entries.

Report name - Enables you to only display log entries for a certain report, a generic report name or ALL reports. If the F4 key is pressed a list if AnyStore report names is presented. The default is to display log entries for ALL reports.

Document Identifier - This enables you to display log entries for a specific Kofax document identifier. The default is to display entries for all document identifiers.

Document date range - Allows you to display of log entries for a specific document (posting) date range. The default is from *AVAIL to *CURRENT.

Run date range - Allows you to display of log entries for a specific AnyStore monitor run date range. The default is from *AVAIL to *CURRENT.

DLTLOGANYS

This command allows you to purge transactions from the enhanced transaction log file that are older than a specified retention period.

DELETE LOG FOR ANYSTORE (DLTLOGANYS) Type choices, press Enter. DAYS OF LOG ENTRIES TO RETAIN . 30 0-999 F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display F24=More keys

The only parameter for this command is Days of log entries to retain. The default is to delete log entries older than 30 days.

Chapter 9. Backup and Recovery

Ascent Capture Database Backup and Recovery

See the manual Getting Started with Ascent Capture.

OnDemand for iSeries AnyStore Integration Database Backup and Recovery

To backup the integration database, save all of the files in the QRDARSK library on the iSeries. This can be accomplished using the Save Object command as shown below:

SAVOBJ OBJ(*ALL) LIB(QRDARSK) DEV(TAPxx) OBJTYPE(*FILE)

OnDemand for iSeries Backup and Recovery

See the Content Manager OnDemand for iSeries Administration Guide, SC41-5325.

Chapter 10. Security Considerations

OS/400 Integrated File System Security

The /ASCENT IFS directory and its subdirectories should be secured for use to only authorized OnDemand for iSeries users. The QRDARS400 authorization list is used by OnDemand for iSeries to specify who has access to OnDemand archived objects. Each OnDemand for iSeries user should be added to the QRDARS400 authorization list using the OnDemand Report Administration Menu (RDARSRPT), option 10. For further information about OnDemand for iSeries security, refer to the *Content Manager OnDemand for iSeries Administration Guide.*

OnDemand for iSeries Security

OnDemand provides security at the report group, report and key levels for AnyStore reports.

For further information about OnDemand for iSeries security, see the *Content Manager OnDemand for iSeries Administration Guide*, SC41-5325.
Chapter 11. Error Messages

Ascent Capture Error Messages

To view the meaning of a message displayed by Ascent Capture, visit the Kofax Image Products Web Site at <u>http://www.kofax.com.</u>

Error messages are logged into the \Program Files\Ascent\Logs\ERR_yymm.txt file and \Program Files\Ascent\Logs\LOG_yymm.txt files, where yymm is the year and month that the failing job was run.

AnyStore Error Messages

All AnyStore Error messages can be found in the QRLCMSGF message file in library QRDARS.

To view a message description, use the Display Message Description command (DSPMSGD) or the Work Message Description command (WRKMSGD).

Example for AnyStore Feature

DSPMSGD MSGID(RDR2501) MSGF(QRDARS/QRLCMSGF)

Chapter 12. Using the iSeries AnyStore Monitor to Archive User Defined Data

Using the AnyStore monitor, it is possible to archive any PC file stored in an Integrated File System (IFS) directory on the iSeries. Once a file has been archived, it can be retrieved using the OnDemand Client. If the object type of the archived file is specified as User Defined, the OnDemand Client will launch an application that is associated with the file extension of the file. Using this approach, files such as word processing documents, spreadsheets or presentations could be archived in OnDemand Client, the appropriate PC application will be launched to display the PC file.

In order to archive and retrieve User Defined Data, a report definition must be created with a report type of ANYS, a data type of *IFS and an object class of 255 (User Defined). The PC file extension must be specified using either iSeries Navigator or the BLDAPP program from a 5250 session. The PC file extension is sent to the OnDemand Client when the file is retrieved and it is the extension which determines which PC application will be launched to display the file.

Setting The PC File Extension to Launch a PC Application

Using iSeries Navigator to set the PC File Extension

When creating or updating an ANYS report definition, the Client - General dialog has two parameters that are critical for User Defined Data. The *Object class* parameter must be set to 255 and the *Extension* parameter must be set to the three letter file extension for the type of documents being archived.

Change Report Definition - WO	Change Report Definition - WORD 01			
General Archive Client - General	Retrieval Exits Keys			
Code page: Rotation:	37 0 🖵 degrees clockwist			
Object class:	255 💽 Extension: DOC			
Paper size:	Autosize (defined in data stream)			
Show report in folder list Merge overprinted lines				
Query fields:	Hit list fields:			
File Name File Type Author Keywords Date	Date(Desc) File Name (Asc) File Type(Asc) Author (Asc) Keywords (Asc)			
Cha	ange field lists			
	OK Cancel Apply			

Using a 5250 session to set the PC File Extension

- 1. Create a source physical file by issuing CRTSRCPF FILE(QGPL/APPSRC) (Note: this file must be in library QGPL.)
- Add a member to this file using the name of the report as the member name. You can use SEU to add the member and edit it. The type of member does not matter, but you should describe it as TXT so that no syntax checking will be done. The contents of this member will be described later.
- 3. Edit the member and specify the file extension you want to set. See the sample below for what can be specified in this member.
- 4. Run the BLDAPP program specifying the report name (all upper case characters) as the first parameter and the version number of the report as the second parameter. Because the version number is numeric, you **MUST** enclose the value in apostrophes.

For example, to specify different defaults for the WORD report you would create a member called WORD in the APPSRC file in library QGPL. After editing it with the data you want, you would then call the QRLGBLDA program as follows:

```
CALL QRDARS/QRLGBLDA PARM(WORD '01')
```

The contents of the member in the APPSRC file in library QGPL could look like this:

```
[@_FIXED_@]
* An * in column 1 makes the record a comment record
LRECL=133
RECFM=F
CC=ANSI
CDPG=37
EXTENSION=DOC
```

Each parameter must be on a separate line as shown. Lines 1-5 above **MUST NOT** be changed. The code page for your iSeries might not be 37 (US English), so the CDPG value may need to be changed in line 6.

The [@_FIXED_@] must be entered exactly as shown. On many PCs, you may have to change the keyboard mapping for the terminal emulator to get the square brackets (even though square brackets are shown on the keyboard itself). If the square brackets don't show on the screen then they are probably not the right character.

Working with AnyStore Monitor Files to Archive User Defined Data

The AnyStore monitor uses two DB2/400 database files during processing:

- The Document Store File (QARLSSTOR)
- The Document Path File (DOCUMENTS)

The Document Path File contains the path and file name of the IFS file to be archived.

Note that the file name can not contain any blanks. For example:

This file name will work: OD_SFA_Work_Management.doc

This file name will NOT work: OD SFA Work Management.doc

Each IFS file must be assigned a unique document ID which matches the document ID of a cooresponding record in the Document Store File.

DOCUMENTS File Field Name	Max. Length / Type	Optional / Required	Comments
DOCUMENT_ID	15 CHARACTER	Required	A unique identifier for the document to be archived. Must match the ANYSTORE_DOCID of a record in the QARLSSTOR file. The document identifier is only used to distinguish documents until the documents are archived. Example identifiers might be the PC file name, your user id or your workstation id plus a sequence number. Any value can be used, as long as it is unique. Will also be used as the processed document name, if processed documents are not deleted.
DOCUMENT_PATH	50 CHARACTER	Required	The iSeries IFS path and file name of the file to be archived. (eg. E:/PCFILES/WRKSHEET.WK3)

The Document Store File contains the index data required by AnyStore to archive an IFS file. Each IFS file must be assigned a unique document ID which matches the document ID of a corresponding record in the Document Path File.

QARLSSTOR File Field Name	Max. Length / Type	Optional / Required	Comments
ANYSTORE_DOCID	15 CHARACTER	Required	A unique identifier for the document to be archived. Must match the DOCUMENT_DOCID of a record in the DOCUMENTS file. (eg. SCAN01000000005)
ANYSTORE_KEY1	25 CHARACTER	Optional*	OnDemand for iSeries indexing field 1. Default is Blank.
ANYSTORE_KEY2	20 CHARACTER	Optional*	OnDemand for iSeries indexing field 2. Default is Blank.
ANYSTORE_KEY3	20 CHARACTER	Optional*	OnDemand for iSeries indexing field 3. Default is Blank.
ANYSTORE_KEY4	20 CHARACTER	Optional*	OnDemand for iSeries indexing field 4. Default is Blank.
ANYSTORE_KEY5	15 CHARACTER	Optional*	OnDemand for iSeries indexing field 5. Default is Blank.
ANYSTORE_REPORT_N AME	10 CHARACTER	Required	OnDemand for iSeries report definition name as defined in OnDemand for iSeries setup.
ANYSTORE_VERSION	2 CHARACTER	Optional	OnDemand for iSeries report version as defined in OnDemand for iSeries setup. If not provided, the default is 01. A leading zero is required for single digit versions.
ANYSTORE_POSTING_ DATE	10 CHARACTER	Optional	The date of record for this file. This date can be used by OnDemand for retrieval of the file. If not provided, the default is the iSeries's system date. Date must be in ISO date format (YYYY-MM-DD) or (YYYYMMDD). (eg. 2000-05-01 or 20000501)
ANYSTORE_RUN_COM MENT	50 CHARACTER	Optional	If not provided, the default is the report name description as defined in OnDemand for iSeries report definition.

* An index value must be specified for at least one index field.

The AnyStore monitor uses the QARLSSTOR file to trigger archive processing. The correct steps for archiving IFS files using the AnyStore Monitor is:

- Place the file to be archived in an IFS directory on the iSeries.
- Write a record in the DOCUMENTS file with the path and file name of the IFS file. This can be done using a program, or the Data File Utility.
- Write a record in the QARLSSTOR file with the index information needed to archive and retrieve the IFS file, using the same document ID used in the DOCUMENTS file. This can be done using a program, or the Data File Utility.
- If the AnyStore monitor has not been started, start it to archive the IFS file into OnDemand. If the AnyStore monitor is already running, the IFS file will be archived into OnDemand automatically.
- Use the OnDemand Client to retrieve the IFS file and launch the Windows[™] associated workstation application to view the IFS file.

Chapter 13. Content Manager Integration

Integration of OnDemand AnyStore data with IBM Content Manager for iSeries (Content Manager; formerly known as IBM ImagePlus® VisualInfo™, VI/400) is now supported using the CM Integration Index Exit program, QRLWEXITV.

For more details on the implementation of CM Integration with AnyStore data, see the document titled *Integrating Content Manager OnDemand AnyStore Documents with Content Manager*, available on the Library page of the OnDemand for iSeries website at

http://www.ibm.com/software/data/ondemand/400/library.html

Part 2. OnDemand Common Server Integration with Kofax Ascent Capture

Chapter 14. Overview

Kofax Ascent Capture images can be stored in OnDemand Common Server, just as they can be stored in Spool File Archive. However, the interface to Common Server is significantly different from the AnyStore Release Script used with Spool File Archive. The limit of 5 keys has been removed and there is no longer a requirement for an ODBC interface.

As in the AnyStore Release Script interface for Spool File Archive, a network drive must be mapped to an Integrated File System (IFS) directory. This mapped directory is where the release data is placed. The data is then stored into OnDemand by utilizing the **arsload** API in the QSHELL environment.

Ascent Capture Release Files

The Ascent Capture Release Script for Common Server creates files in an IFS directory using the following name format:

IBMCM.ODKRel.ACClass1.ACClass2.YYYYMMDD.HHMMSS.ARD

IBMCM.ODKRel.ACClass1.ACClass2.YYYYMMDD.HHMMSS.ARD.ind

IBMCM.ODKRel.ACClass1.ACClass2.YYYYMMDD.HHMMSS.ARD.out

- **IBMCM** Constant value. This is the MVS position of the MVS naming convention used by the arsload API.
- **ODKREL** Constant value. This is the Job Name position of the MVS naming convention used by the arsload API.
- ACClass1 Set based on the value chosen in the Common Server Release Script on the Document Storage tab under OnDemand File Naming. If *Document Class maps to Application Group* is chosen, this value will be the batch class. If *Document Class maps to Application* is chosen, this value will be the document class.
- ACClass2 Set based on the value chosen in the Common Server Release Script on the Document Storage tab under OnDemand File Naming. If *Document Class maps to Application Group* is chosen, this value will be the document class. If *Document Class maps to Application* is chosen, this value will be the batch class.
- **YYYYMMDD** The date the batch was released.
- HHMMSS The time the batch was released.
- **ARD** Constant value.
- ind Constant value which identifies the index stream file.
- **out** Constant value which identifies the data stream file. This contains all the released documents concatenated together in a single file.

Chapter 15. Setup Tasks - iSeries and Workstation

Prerequisite Software

- OnDemand (5722-RD1) Version 5 Release 1 or above Common Server (not Spool File Archive)
- OnDemand Administrator Version 7.1.0.5 or above
- Ascent Capture Version 5.0 or above
- IBM Content Manager OnDemand Common Server Release Script for Kofax Ascent Capture Version 5.0 or above. The Common Server release script is available at no charge as Freeware from the Kofax website at <u>http://www.kofax.com/products/ascent/release_scripts/partner.asp#freeware</u>

For additional information, please refer to the Release Script documentation available from the Kofax website noted above. The OnDemand AnyStore feature (5722-RD1 option 4) and the AnyStore Integration PRPQ (5799-GEQ option 3) are not required for the Ascent Capture Release Script interface to Common Server.

Change Regional Date Settings

The default date format may need to be changed. In Windows XP, for example, the date format can be verified and changed if needed using the Control Panel.

- Go to Control Panel.
- Open "Regional and Language Options".
- Click the Customize button and then select the Date tab. Note the *Short date format* field. This date format must match the date format specified when the date field is defined in the Application Group. For example, if the Application Group date format is %m/%d/%Y, the *Short date* format must be **MM/dd/yyyy**.

OnDemand for iSeries Setup

Create an application group for Ascent Capture

- Open the OnDemand32 Administrator.
- Log onto the OnDemand Server where the report definition is to be created.
- In the left panel, highlight **Application Groups** and select **New Application Group**.

Add an Application Group		×	
Permissions	Field Definition	Field Information	
General	Message Logging	Storage Management	
– Application (aroup Name		
Name PatChkGrp			
Description Ascent Capture - Patient Application Group			
Description Ascent Capture - Patient Application Group			
		Ad <u>v</u> anced	
	OK Cancel	Help	

• On the **General** tab, enter the *Application Group Name* and *Application Group Description*.

The *Application Group Name* must be unique. Even though the *Application Group Name* can be 60 characters, if you are storing reports from OS/400 spooled files, it is suggested that the *Application Group Name* should be 10 characters or less.

• Select the Advanced button to access the Database Information panel.

Database Information	×
Database Organization M <u>a</u> ximum Rows 10000000 Multiple loads per database table Single load per database table	Annotation Annotation flags in document database table?
<u> </u>	Help

The *Annotation Flag* field should be **Yes** to allow the notes symbol to be displayed when the document hit list is shown. Press **OK** to return to **Application Group General** tab.

• Select the **Storage Management** tab.

Add an Application Group				×
Permissions General	Field Def Message Loggi	inition ng	Field Information Storage Management	
Storage Set Name POLICY90				
Cache Data Life of Data and Indexes				
	Adva	nced		
	OK Ca	ncel	Help	

Select the Storage Set Name that relates to the Migration Policy for this Application.

Enter the *Cache Data* (disk storage in the IFS) and the *Life of Data and Indexes* values you require.

The Life of Data and Indexes should be the total of sum of the duration values for all iSeries Navigator Common Server Migration Policy storage levels plus the number of days in Cache Data days.

Select the *Expiration Type* desired. This defines how the application data will expire.

- Load Data and indexes are expired by input file (one Load at a time).
- Segment Data and indexes are expired one Segment at a time.
- Document Data and indexes are expired one Document at a time.
- Select the **Permissions** tab.

Add an Application Grou	up			×
General Permissions	Messa F	ge Logging	Storage Management Field Information	
Application <u>G</u> roup	ogical Views	Query Restriction		
🗖 Administrator		Us <u>e</u> rs/Groups	Defined	
Document // // View // Add // Delete // Update // Print // FAX	Agnotation — View Add Delete Update Frint FAX	CALLEN DAVISMJ DAVISMJTST DBRYANTUSR DWAGNER NOBRIEN QONDADM YEEFU	*PUBLIC	
🔽 Сору	🗖 Сору	Add	<u>R</u> emove	
	OK	Cancel	Help	

Choose the Application Group and Application Group data permissions for users, user groups and *PUBLIC.

Enter Query Restrictions as needed.

• Select the Field Definitions tab.

Add an Application Gro	ηρ	×
General Permissions	Message Logging Field Definition	Storage Management Field Information
<u>D</u> atabase	Field Name Names List Patient# Check# CheckDate Version	<u>A</u> dd <u>R</u> emove
[OK Cancel	Help

Add a *Database Field Name* for each Application Group field by keying the field name and selecting the **Add** button.

• Select the Field Information tab and enter the field information.

Add an Application Group			×
General Mess Permissions	age Logging	Storage Management Field Information	
Na <u>m</u> e Patient# Type Index ▼ Data Type String ▼ Segment Log	Strir Ca U; Tyj Fix Ler 7	ing Embedded Ipper I Embedded Ipper Leading ixed I Frailing	
Mapping Database Value Displayed Value Application ID Field	ayed Value Database	e Value	
OK	Cancel	Help	

Change each defined field by selecting the field in the Name box.

Enter the *Type* of field (Index, Filter, or Not in the Database)

Enter the Data Type for the field (String, Integer, Decimal, Date, Date/Time, etc.).

If the field has a Data Type of String, the String Length must be specified.

A segmentation field should be selected. This field will have a Data Type of Date or Date/Time.

Add an Application Group	×
General Message Logging Storage Management Permissions Field Definition Field Information	
Name CheckDate	
v Segment □ Log □ Expire Date □ User Exit	
Mapping Database ⊻alue Displayed Value Displayed Value	
Application [D Field Add Bemove	
OK Cancel Help	

Also, a Version field should be created. Creating this field provides a versioning capability that is similar to that which exists in Spool File Archive. This field is defined as a filter or index. If using a Version field, enter the version value(s) under the *Mapping* parameter. The *Database Value* and *Displayed Value* must be entered. This field is also defined as an *Application ID* field.

Add an Application Group	x
General Message Logging Permissions Field Definitio	Storage Management
Name Version Type Filter Data Type String Segment Log Expire Date User Exit	String Case Embedded Mixed Leading Fixed Length Trailing 2
Mapping Database ⊻alue Displayed Value Displayed Value Version 01 Version 02 Version 03 ✓ Application ID Field	Database Value D1 D2 D3
OK Cance	Help

• Press **OK** to create Application Group.

Create an application for Ascent Capture

٠ In the left panel, highlight Application and select New Application.

Add an Application			ļ	×
Logical View Fields General View Ir	: Cogical Views nformation Indexer Inf	Miscella ormation	aneous Options Load Information	
<u>N</u> ame Description	PatChk01Doc Ascent Capture - Patient I	Checks		
Application Group	PatChkGrp		<u>S</u> elect	
<u>I</u> dentifier	01			
	DK Cancel	Help		

On the General tab, enter the Application Name and Application Description. ٠

The Application Name can be 60 characters, however, it is recommended that the Name be restricted to 1 to 10 characters. An Application Group must be selected. If that Application Group has an Application Identifier field, the Application Identifier must be selected.

×

 Select 	t the View In	formati	i on ta	ıb.
Add an Appl	ication			
Logical	View Fields 📔 Log	gical Views	Misc	ellaneous Options
General	View Information	Indexer Info	rmation	Load Information
<u>D</u> ata 1 O <u>r</u> ienta	Type TIFF	•		

Cancel

Help

Enter TIFF as the Data Type.

ΟK

• Select the Indexer Information tab.

Add an Application		×
Logical View Fields General View Inform	Logical Views ation Indexer Infor	Miscellaneous Options mation Load Information
Indexer Generic	Parameters So <u>Eyboard</u> <u>Earameter f</u>	ource C <u>S</u> ample Data
OK	Cancel	Help

Enter Generic as the Indexer type.

• Select the Load Information tab.

Add an Application				
Logical View Fields Logical Views Miscellaneous Options General View Information Indexer Information Load Information				
File Format Data Compression OD77 Large Object Compressed Compressed Compressed				
Resource Compression DD77 Dbject Size (K) Preprocessor Parameters				
Application Group DB Name Load ID Name CheckDate Patient# Check# Default				
CheckDate <u>F</u> ormat %m/%d/%y Character Removal				
□ Use Page Identifiers				
Postprocessor Parameters				
OK Cancel Help				

Highlight the CheckDate.

Enter t (for today) as the *Default Value*.

When a date is not supplied in the index file, the CheckDate will default to the today's date for the load date. For this example, the Date Format must be %m/%d/%Y. For this Application, the expected date format is mm/dd/yyyy. The date format must match the ShortDate format in the Regional Settings Date parameter on the workstation. This date format will be used by the Scan function of Ascent Capture and will be used to create the index files in the Release function.

Change the File Format Data field value to None.

• Press **OK** to create the Application.

Create a folder for Ascent Capture

• In the left panel, highlight **Folders** and select **New Folder**.

Add a Folder	×
General Permissions Field Definition Field I	nformation Field Mapping
Name PatFolder Description Patient Information Folder Display Document Location	Note Search C <u>H</u> it List C Retrie <u>v</u> e C No <u>t</u> e
Application <u>G</u> roups	Selected
IVPMK ▲ LABOR ▲ LABORMK ▲ LOJOBLOG PERF-PDF PURCHORD QPRLRCDS RD4575 STATEMENTS-AFP STATEMENTS-PDF ▲	PatChkGrp
OK Cancel	Help

- On the **General** tab, enter the Folder *Name* and Folder *Description*.
- Select the appropriate option under the Note Search box

Note that the *Note* Search box is ignored if the Application Group Annotation Flag in the **Database Information** panel is set to **Yes**.

- Highlight the Ascent Capture Application Group you just created and select the **Add** button to add the Application Group to the *Selected* column.
- Select the **Permissions** tab.

Add a Folder	×
General Permissions Field Definition Field In	formation Field Mapping
- Authority	User/Group Fields
🗖 Administrator 🔽 Access 🗖 Fields	C Yes © No
Named Queries	Maximum Hits
□ P <u>u</u> blic □ Pri <u>v</u> ate □ Vie <u>w</u>	No Limit No Limit
Secondary Folder	
CALLEN DAVISMJ DAVISMJTST DBRYANTENU DBRYANTUSR DWAGNER NOBRIEN QONDADM YFFFI	PUBLIC
OK Cancel	Help

Select the appropriate authorities for Users, User Groups and/or *PUBLIC.

• Select the Field Definition tab.

The valid fields for the Folder must be entered. These fields will be mapped to fields in the Application Group(s) that were selected for this Folder.

Define the Patient# field.

Add a Folder
General Permissions Field Definition Field Information Field Mapping
None Patientt
Description Patient Number
Field Type String
Mapping Type Single
OK Cancel Help

Define the Check# field.

Add a Folder	×
General Permissions	Field Definition Field Information Field Mapping
Name Chec	k# <u>Folder Fields</u> Patient#
Description Chec	sk Number
Field Type String	g 💌
Mapping Type Singl	le 🔽
0	Cancel Help

Define the CheckDate field.

Add a Folder			×
General Permissions	Field Definition	Field Information F	ield Mapping
<u>N</u> ame Chec Description Patie Field Type Date <u>M</u> apping Type Sing	kDate nt Check Date e	Eolder Fields Patient# Check#	
ок	Canc	el Help	<u>R</u> emove

• Select the Field Mapping tab.

The Folder fields must be mapped to the Application Group fields. The Folder field name and the associated Application Group Fields are highlighted. **Add** is selected to map the fields. The Mapped Folder Fields are shown at the bottom of the panel.

Add a Folder	X
General Permissions Field Definition Field Information	Field Mapping
Name CheckDate	<u>A</u> dd <u>R</u> emove
Database Name Application Group	
Patient# PatChkGrp Check# PatChkGrp CheckDate PatChkGrp Version PatChkGrp	
Mapped Folder Fields	I
Patient# Patient# PatChkGrp Check# Check# PatChkGrp CheckDate CheckDate PatChkGrp	
OK Cancel Help	

- Press **OK** to create the Folder.
- Close the OnDemand Administrator Client.

Ascent Capture Setup

Launch the Ascent Capture Administrator using Start / Programs / Ascent Capture / Administration.

Create New Index Fields

- Select the Field Types tab and right-click in the window.
- Right-click and select New Field Type.

Field Name	Description	Data Type	Size
Date	Generic Date	DATE	
Numeric4	4 Digit Numeric	NUMERIC	4, 0
Numeric7	7 Digit Numeric	NUMERIC	7, 0

• Create three fields Date, Numeric4 and Numeric7.

The field information in the **Create Field Type** display is entered. To accept each field, the **Save** button must be pressed.

<u>l</u> ame:	Numeric4	
escription:	Numeric 4 digits	
)įctionary:		Browse
)ata <u>t</u> ype.	NUMERIC	-
	Numeric digits.	

• Once all fields are created, click on Close.

Create a New Document Class

- Select the **Document** Tab and right-click in the window and select **New Document Class**.
- Enter "PatCk01Doc" in Name field and "Patient Checks Application" in the Description field.

Field	Field Type	Required
Name		
Patient#	Numeric7	True
Check#	Numeric4	True
CheckDate	Date	False

The document class name should correspond to the value chosen in the OnDemand Release Script on the Document Storage tab under OnDemand File Naming.

- If Document Class maps to Application Group is chosen, the document class must match the application group name.
- If Document Class maps to Application is chosen, the document class name must match the application name.
- Select **New** to add each new field. Once all fields have been added, press **OK** to accept the Document Class definition.

	tiest Check Applied	wae I					
escription: [Pe	ment check Applica						
dex <u>F</u> ields:							
lame	Field Type	Default	Required	Verify	Hidden	Sticky	Total
atient#	Numeric7	0	True	False	False	False	False
heck#	Numeric4	0	True	False	False	False	False
heckDate	Date	{Current Date}	False	False	False	False	False

• Click on **OK** to close the window.

Create a New Form Type

- Right-click on the **Document Class** Tab and select **New Form Type**.
- Enter Form Type "PatChecks" as the Name and select "Fixed Number of Pages."
- Enter 1 page per document.

reate Form Type		2
General Image	Page Level Bar Code	
<u>N</u> ame:	PatChecks	
Description:	Patient Checks Form Type	
Document <u>c</u> lass:	PatCk01Doc	
	Eixed number of pages	
	1 .	
	OK Cancel	Heln

• Click on **OK** to close the window.

Create a New Batch Class

• Select the **Batch** tab.

Right-click in the window and select New Batch Class.

Enter the Batch Class Name, Batch Class Description and Image Folder. The Image folder is the temporary location where images are stored between the Scan and Release processes.

10						
ame:	PatChkGrp				Priority: 5	
escription:	Patient Checks I	Patient Checks Batch Class				
age folder:	C: Program Files	sVAscentVimages			<u>B</u> rowse.	
atch <u>F</u> ields:						
Vame		Field Type	Default	Required	Hidden	

The batch class name should correspond to the value chosen in the OnDemand Release Script on the Document Storage tab under OnDemand File Naming.

- If *Document Class maps to Application Group* is chosen, the batch class must match the application name.
- If *Document Class maps to Application* is chosen, the batch class name must match the application group name.
- Select the **Queue** tab.

Select the *Scan, Validation,* and *Release* queues by highlighting the appropriate queue under "Available Queues" and selecting **Add** to move this queue to the "Selected Queues" column.

ate Batch Class			
eneral Queues Separation and Form Ide Available Queues Quality Control Recognition Server Verification	ntification Advanced	Selected Queues	
	<< <u>R</u> emove Remove All <u>P</u> roperties		
es <u>c</u> ription The Release module writes documents an	d image files to permanent stor	age.	
		ок са	incel <u>H</u> elp

Select the Separator and Form Identification tab.

Select Kofax fixed pages.

reate Batch Cla	ass	X
General Queue	es Separation and Form Identification Advanced and Form Identification Options and Form Identification Options anual	
C Kofax pa C Kofax ba C Kofax se	atch code separators ar code separators eparator sheets	
C Kofax pa C <u>C</u> ustom	age recognition Kotax Bar Code Separators	
	ок	Cancel <u>H</u> elp

Select OK to accept the new Batch Class.

OnDemand Release Script Setup

• Select the **Batch** Tab.

Right-click on the batch you just created and select Insert Document Class.

Select the **Document Class** that you created earlier. The Document Class represents the OnDemand application name to be used for this Ascent Capture batch.



Highlight the **Document Class** to be used and press **OK** to insert the Document Class.

👷 Ascent Capture - Administratio	n
<u>Eile Edit Scan View Scripts Too</u>	ols <u>H</u> elp
Batch Document Field Types PatChkGrp PatCk01Doc Image: State S	
Software Import	
For Help, press F1	

Right-click on the Document Class and select Release Script.

vailable Release Scripts			Assigne <u>d</u> Release Script
Script Name	Version		Script Name
Ascent Capture Database	5.0/5.0	Add >>	
Ascent Capture Text	5.0/5.0		
BM Content Manager OnDemand	5.0/5.0	w Romoun	
OnDemand/400 32-bit Release	3.0/3.0	<= KENIOVE	
		Setup	
		Upgrade	

Highlight **IBM Content Manager OnDemand**, then select **ADD**. The Release Script setup will automatically be launched.

IBM C	iontent Ma	nager On	Demand Release	Setup			×
Batel Docu <u>N</u> ame	h class: iment class: a:	PatChk0 PatCk01 Patient	ờrp Doc Checks Release Sci	ript			
ind	lex Storage ndex Values	Documer	nt Storage Image F	ormat			
	Sequence			Index Value			۱ <u>d</u> d
	1		Patient#			Dş	glete
	2		Check# Delete			ete All	
] 3		CHECKDate			* h	love
	ndex File Coo	depage — V S	pecify codepage:	0037			
				ОК	Cancel	Apply	Help

On the **Index Storage** tab, check "Specify codepage" and enter the code page of the data being stored (which is most likely the code page of the instance to which this data will be stored).

On the **Document Storage** tab shown below, enter the Release directory, select OnDemand File Naming, and the OnDemand Directory Information.

The *Release directory* is a network drive mapped to the iSeries server. This network drive is the drive and directory where the Ascent Capture documents are released. On the iSeries server, you must create a directory to contain the released documents. (For example, on an OS/400 command line, key **mkdir '/ASCENT'** and **mkdir '/ASCENT/SCAN01'**.)

The *Local working directory* is the temporary directory to be used during the release process and should be local to the release workstation.

The *Remote directory path* is the OS/400 directory to be appended to the file name in the Generic Indexer file that is created. Without this value, the file name in the **xxx**.ind file would not contain the fully qualified directory name. If the environment where the **arsload** API is to run does not contain a path statement for the Ascent Capture Release Directory, the **xxx.ind** file must contain the fully qualified directory name for the **xxx.out** file.

aton class:	PatChkGrp RetCk01.boc	
ame:	Patient Checks Release Script	
Index Storage	Document Storage Image Format	
Image Files —	mage files	
Release direc	xtory: S:VASCENT/SCAN01 page of each document	Browse
OnDemand Fill OnDemand Fill OnDemand Di OnDemand Di	e Naming t Class maps to OnDemand Application Group t Class maps to OnDemand Application rectory Information	
Local workin	g directory: C:\Temp	Browse
Remote direc	tory path: ASCENT/SCAN01/	1

OnDemand File Naming determines the structure of the name that is created in the Integrated File System.

- Document Class maps to OnDemand Application Group causes the document class to be used as the Application Group name, and the Batch Class will be the Application name.
- Document Class maps to OnDemand Application causes the document class to be used as the Application name, and the Batch Class will be the Application Group name.

atch class:)ocument class:	PatChkGrp PatCk01Doc	
lame:	Patient Checks Re	lease Script
Index Storage	Document Storage	Image Format
Release Imag	jes As /pe: Multipage	TIFF - CCITT Group 4
- PDF Settings	Нць	Watched Eolder
- Page Conte	ent Text & Graphics	PDF Document Information
	i excicitapriles	Subject
English (U	5)	Author
Dictionaries		Workflows
Suspect Re © DCR or Suspec Word n Mixed a	egions infidence below [t font of in dictionary Iphanumeric	95 🕂 🌣 Advanced Settings Create thumbnais Embed fonts Enable links Enable structure

On the Image Format tab, the Image file type must be selected.

Click **Apply** and then select **OK** to accept changes.

ease Scripts				
eneral				
Available Release Scripts			Assigned Release Scripts	
Script Name	Version		Script Name	Version
Ascent Capture Database	5.0/5.0	Add >>	IBM Content Manager OnDemand - Patient C.	5.0/5.0
Ascent Capture Text IBM Content Manager OnDemand OnDemand/400 32-bit Release	5.0/5.0 5.0/5.0 3.0/3.0	<< Remove Setup		
			Close	

Click Close.

Right-click on the **PatChkGrp** Batch Class and select **Publish** to allow the Batch Class to be used by the Batch Manager.

	×
Last Published	⊻alidate
09/18/2001 4:39:07 PM	Pu <u>b</u> lish
	Disable
	Select All
	Cļose
	Help
	11.5
ChkGrp	*
	Last Published 09/18/2001 4:39:07 PM

Select **Close**, then exit the Administration program.

At this point, you would begin scanning or importing and indexing your documents. See the Kofax Ascent Capture documentation for details.

Chapter 16. Release Processing

Run Batch Manager

Launch the Ascent Capture Batch Manager using Start / Programs / Ascent Capture 6.0 / Batch Manager.

Create New Batch

Create a New Batch by selecting the **Create Batch** button •



Name your batch **Batch 001** and give your batch a description. ٠

reate Batch		×
General Total	ils Scan	
Batch class:	PatChkGrp Priority: 5	÷
Description:	Patient Checks Batch Class	
<u>N</u> ame:	Batch 001	
Description:	New Patient Batch	
Pages per do	cument: 1 👘 Doguments per batch: 0 👘 Pages per batch: 0	÷
		alb

- Select the **Save**, then select **Close**. ٠
- Install the Kofax Ascent Capture hardware key.

Scan Batch

This is an example of scanning a Kofax batch by using scanned images that have been stored in a directory on your personal computer.

Highlight the batch to be processed and select the Process Batch button • The Ascent Capture Scan queue will start.



🖗 Batch 001 - Ascent Capture - Scan	
<u> 3</u> atch <u>D</u> ocument <u>P</u> age <u>S</u> can ⊻iew <u>T</u> ools <u>H</u> elp	
1 🖬 👪 🎫 💉 🕐 🗛	- <u>0</u> Q da
Software Import	
Batch Contents	
Batch Thumbnails	
r Help, press F1	PatChkGrp Doc
Select the Scan Batch button	The Import window will op

• Import your data from the input source.



Close the batch by selecting the Close Batch button

Index/Validate Batch

- Select the **Process Batch** button and Ascent Capture Validation will start. The first check image should be displayed.
- Enter the *Patient#*, *Check#* and *CheckDate*.
- Press the **Tab** key to accept entries.

🚔 Batch 001 - Ascent Capture - Validation	×
<u>B</u> atch <u>D</u> ocument <u>P</u> age Field <u>V</u> iew <u>T</u> ools <u>H</u> elp	
All ① Q C C Whole Page	
	1/2
Patient# 3918773 👔 Williams McGowan 231	1
Check# 231 800000000 1 2000	Sec.
CheckDate: 01/01/2000	14.15
🎼 Pay To The	200
Order Of On Demand Comunity Hospital \$ 85.87	3
Eighly Five and 87/100s Dollars	Section .
	111.10
Memo# 3918773Williams McDowans	the second
1:259876542:00087654300450"5432	Colorite.

• Select **Yes** to save index data.

Ascent Capture - 1	Validation	×
Save da	ta before clo:	sing document?
Yes	No	Cancel

- Select **Yes** to save the data from this scanned image.
- After the last check image is indexed, select **Yes** close the batch.

Ascent C	apture - Validation		×
⚠	All documents have b	een processed	. Close batch?
	Yes	No	

Batch Release

Date Queue ! Status	Class
rp 03/23/2001 Scan Ready	PatChkGrp
rp 03/23/2001 Scan Re	PatChkGrp

- Right-click on the batch and select **Process**
- Close the Batch Manager.
- From a green-screen session, the **WRKLNK** command is used to determine that the Ascent Capture Data exists in the OS/400 IFS directory.

WRKLNK '/ASCENT/SCAN01/*'

Because we selected the document class equates to the OnDemand application name, the format of the file structure is

IBMCM.ODKREL.document_class.batch_class.YYYYMMDD.HHMMSS.ARD.xxx

Examples of the file names created in the /ASCENT/SCAN01 directory are shown below.

```
IBMCM.ODKRel.PatCk01Doc. PatChkGrp.20010321.131522.ARD
IBMCM.ODKRel.PatCk01Doc. PatChkGrp.20010321.131522.ARD.ind
IBMCM.ODKRel.PatCk01Doc. PatChkGrp.20010321.131522.ARD.out
```

PatChkGrp is the batch class and becomes the Application Group and **PatChk01Doc** is the document class and becomes Application name.

Store Ascent Capture Batch

Running arsload API

The **arsload** API is used to process Ascent Capture batches. The **-***d* parameter represents the Ascent Capture Release Directory. The **-***h* parameter represents the instance name where the data is to be stored. Multiple instances may exist on a single OS/400 machine.

Running arsload API from an OS/400 command line:.

QSH CMD('arsload -A DATASET -d /ASCENT/SCAN01 -f -G FORMS -h QUSROND ')

Running arsload API from the QSHELL environment:

From an OS/400 command line, enter STRQSH or QSH and press ENTER.

arsload -A DATASET -d /ASCENT/SCAN01 -f -G FORMS -h QUSROND

Running arsload API from batch:

SBMJOB JOB(ARSLOAD) CMD(QSH CMD('arsload -A DATASET -d /ASCENT/SCAN01 -f -G FORMS -h QUSROND ')) JOBQ(QUSRNOMAX) CPYENVVAR(*YES) JOBD(QRDARS/QOND400)

The CPYENVVAR parameter should be set to *YES or *NO based on whether you want the current environment variables to be used in the batch job. It is important that you submit the command to a job queue that supports multiple jobs. When the **arsload** API is run, multiple background jobs are spawned. These jobs run in the same subsystem where **arsload** is run.

The **arsload** API is issued once and will monitor the **-***d* directory until the command is ended by the user. The **arsload** API can be issued without the **-***A* and the **-***G* parameter. This causes the *DATASET* position to be the OnDemand Application and the *FORMS* position to be the OnDemand Application Group. Refer to the IBM Content Manager OnDemand for iSeries Common Server Administration Guide for more details on **arsload** parameters.

Recovering from arsload API failure

When Ascent Capture releases files to the Integrated File System, three files are created. Below is an example of the three files.

```
IBMCM.ODKRel.PatCk01Doc. PatChkGrp.20010321.131522.ARD
IBMCM.ODKRel.PatCk01Doc. PatChkGrp.20010321.131522.ARD.ind
IBMCM.ODKRel.PatCk01Doc. PatChkGrp.20010321.131522.ARD.out
```

When the **arsload** API fails, the *.ARD* file is renamed to *.ARD.Failed*. The above file would be renamed to

IBMCM.ODKRel.PatCk01Doc.PatChkGrp.20010321.131522.ARD.Failed

Certain errors can be corrected by updating the *.ARD.ind* file and then the *.ARD.Failed* file can be renamed back to its original name. Examples of errors that can be corrected in the Integrated File System *.ARD.ind* file are:

• Date format does not match the date format in Ascent Capture does not match the application load information format. In this case, the *ARD.ind* file can be edited and corrected to make the date format match the application load

information date format, or the date format on the Application Load Information tab can be modified to match the Ascent Capture date format.

- Ascent Capture field name does not match the name in the application group. To fix this problem, the *.ARD.ind* file can be edited and the field name(s) can be changed to match the application group field names.
- The number of Ascent Capture fields is less than the number of application group fields. This problem can be fixed by setting a default value for the field in the Application Load Information tab. If Ascent Capture should have passed all application fields, the *.ARD.ind* file can be edited to add the additional index fields.
- The .*ARD.out* file name in the .*ARD.ind* file does not have the correct path. This is caused by a failure to enter the correct path on the Ascent Capture Release Script Document Storage Tab under the "OnDemand Directory Information" section.

If the error cannot be corrected in the *ARD.ind* file, the three Ascent Capture files in your IFS release directory should be deleted to eliminate confusion. The Ascent Capture Release Script must be corrected, republished and reprocessed through Batch Manager.

Appendix A. Additional Information Sources

Manuals

Ascent Capture

Getting Started with Ascent Capture

OnDemand for iSeries

Spool File Archive

IBM DB2 Content Manager OnDemand for iSeries Administration Guide - SC41-5325

Common Server

IBM DB2 Content Manager OnDemand for iSeries Common Server Administration Guide - SC27-1161

Web Sites

IBM OnDemand - <u>http://www.ibm.com/software/data/ondemand</u> IBM iSeries Access - <u>http://www.ibm.com/servers/eserver/iseries/access/</u> Kofax Image Products - <u>http://www.kofax.com</u> Microsoft - <u>http://www.microsoft.com</u>

Information APARs

IBM OnDemand for iSeries

II12715 - Available PTFs for V5R1 of OnDemand for iSeries (5722-RD1)

II13168 - Available PTFs for V5R2 of OnDemand for iSeries (5722-RD1)

II13680 - Available PTFs for V5R3 of OnDemand for iSeries (5722-RD1)

IBM OnDemand Enhancements PRPQ

II11458 - Available PTFs for V3R7 of OnDemand Enhancements PRPQ (5799-GEQ)

Appendix B. Notices

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Programming Interface Information

This publication is intended to help you to use and administer the OnDemand for iSeries AnyStore Integration Release feature of the OnDemand Enhancements PRPQ. This publication documents General-Use Programming Interface and Associated Guidance Information provided by the OnDemand for iSeries AnyStore Integration Release feature of the OnDemand Enhancements PRPQ.

General-Use programming interfaces allow the customer to write programs that obtain the services of the OnDemand for iSeries AnyStore Integration Release feature of the OnDemand Enhancements PRPQ.

Glossary

- **Black border removal -** An image processing feature that removes black borders that might exist on an image as a result of the scan process. For example, black borders might occur when using scanners that use black belts, such as the Bell+Howell Copiscan family of scanners. Black border removal provides a cleaner image for OCR processing.
- **Client Access -** An iSeries program product which provides connectivity between a workstation and an iSeries. Now known as iSeries Access.
- **Collection -** see migration policy.
- **Compression -** A software or hardware process that shrinks images so they occupy less storage space and can be transmitted faster. Compression is generally accomplished by removing the bits that define blank spaces and other redundant data, and replacing them with a smaller symbolic code that represents the removed or redundant bits.
- **Deshade -** An image processing feature that removes unwanted shaded rectangular areas from an image. Removing shaded areas improves OCR accuracy.
- **Deskew -** The process of straightening a crooked image. Deskewing an image can improve the readability of the image for OCR processing. See skew.
- **Despeckle -** An image processing feature that removes unwanted dots or speckles from an image. This provides a cleaner image for OCR processing.
- **Display field -** Like keys, display fields appear to the user on the selection list of documents to view, print, or fax. Unlike keys, users cannot search by display fields. They are for informational purposes only.
- **HFS** Hierarchical File System, used to access data stored in iSeries shared folders and optical libraries.
- **IFS** Integrated File System, used to access data stored in iSeries directories, which include shared folders.
- **iSeries Access** -An iSeries program product which provides connectivity between a workstation and an iSeries. Formerly known as Client Access.
- Key field Also called indexes, keys are used for search and retrieval of images.
- **Line removal -** An image processing feature that removes horizontal or vertical lines from an image, and reconstructs characters affected by the line removal operation. Line removal and character reconstruction increase OCR accuracy.
- **Migration Policy -** The policy describing the aged storage hierarchy used by OnDemand for iSeries during Report Management Cycle (RMC) processing. Previously known as collection.
- **Object class** The type of Integrated File System objects being archived. For integration with Kofax Ascent Capture, the *TIFF object type must be used.
- **OCR** Optical Character Recognition. The ability of software to recognize printed characters and translate them into computer-readable files. The Ascent Capture OCR module can be used to perform OCR index and full text processing.

ODBC - Open Data Base Connectivity. A Microsoft standard for accessing certain database functions without having to know the internals of the target

database. Client Access provides an ODBC driver for accessing DB2/400.

- **Report definition -** A description of the keys (indexes) and display fields used to archive and retrieve an image. It also contains the collection name OnDemand uses when it migrates the image to optical media, or tape.
- **Report type -** OnDemand can archive and retrieve OS/400 spooled reports, OS/400 library objects, OS/400 database files and Integrated File System objects. The report type defines to OnDemand how it should obtain index values for storage and retrieval. For Integrated File System objects, in this case images, the AnyStore (ANYS) report type is used. The AnyStore report type requires that index values be provided by the user, or an application (Kofax Ascent Capture). OnDemand uses other report types to store and retrieve OS/400 spooled files.
- **Report Management Cycle (RMC)** This controls movement of an archived report through the storage hierarchy (moving an archive from disk to optical media or disk to tape).
- **Streak removal -** An image processing feature that removes unwanted vertical black lines from an image. Streak removal increases OCR accuracy.
- TIFF Microsoft/Aldus Tagged Image File Format
- **Version -** When a report definition is created for a new report, a version of 01 is used. When the attributes of the report change, the definition must also be changed to support the new attributes. Rather than creating a new report definition with a new name, OnDemand supports new versions of the same report definition with different attributes. Versioning of reports is necessary to retain the attributes of reports that were previously archived using an old version of a report definition. Version numbers of 01-99 are supported.
- Views The OnDemand Client has the ability to alter the standard appearance of a report when it is viewed. This altered appearance can be saved for later use. A user's default view of a report can also be specified.

Index

0

*IFS, 68 [@_FIXED_@], 69

5

5722-RD1, 113 5799-GEQ, 1, 3, 4, v, 113

A

ADDJOBSCDE, 55, 56 ANYS, 68 AnyStore, 1, 3, 46 AnyStore monitor, 2, 49, 54, 57, 68, 70, 81 ANYSTORE_DOCID, 70 ANYSTORE_KEY1, 47, 70 ANYSTORE_KEY2, 70 ANYSTORE_KEY3, 70 ANYSTORE_KEY4, 70 ANYSTORE KEY5, 70 ANYSTORE_POSTING_DATE, 49, 70 ANYSTORE_REPORT_NAME, 48 ANYSTORE_RUN_COMMENT, 70 ANYSTORE_VERSION, 48, 70 API Application Program Interface, 54 Application Program Interface, 1 API, 54

Ascent Capture, 1, 29, 59 authorization list, 28, 60, 66

B

Batch Class, 32, 39, 41, 50 Create, 39 black border removal, 1, 117 BLDAPP QRLGBLDA, 69

C

Capture Mode, 41 Client Access Express, 11, 29 Collection, 117 Migration Policy, 117 compression, 25, 117 connection, 11, 53 Content Manager/400, v, 81 create Batch Class, 39 Document Class, 35 index field, 33 CRTDTAARA, 54

D

Data Source, 30 deshade, 1, 117 deskew, 1, 117 despeckle, 1, 117 destreak, 1 directory, 27, 32, 49, 53, 66, 68 Display field, 117 DLTLICPGM, 3 DLTLOGANYS, 64 Document Class, 32, 35, 37, 39, 41, 42, 48 create, 35 Insert, 41 **Document Path File** DOCUMENTS, 69 **Document Store File** QARLSSTOR, 69 DOCUMENT_ID, 47, 70 DOCUMENT_PATH, 47, 70 DOCUMENTS, 46 Document Path File, 69 DSPLOGANYS, 58, 60, 63 DSPMSGD, 67 DSPPTF, 59

Е

ENDMONANYS, 60, 63 Error messages, 57, 67 Extension, 68, 69

F

field mapping, 47 Field Types, 33, 34, 36 Form Type, 32, 38, 39

G

group abbreviation, 8, 13

Η

HFS, 117

Ι

IFS, 53, 68, 70, 117 II11458 Informational APARs, 113 II11732 Informational APARs, 113 II11942 Informational APARs, 113 image filtering, 1 Image Format, 50 Importing, 1 inactivity time, 54 Index Field, 32, 45, 47 create, 33 Key Definitions, 36, 117 Index Queue Queue, 40 Indexing, 1 Informational APARs II11458, 113 II11732, 113 II11942, 113 Insert Document Class, 41 iSeries Navigator, 22, 68

K

key definitions, 9, 13 index field, 36, 117 Kofax, 1, 29

L

launch, 68, 71 line removal, 1, 117

Μ

Migration Policy Collection, 117 MKDIR, 28 Multipage TIFF TIFF, 50

Ν

network drive, 31, 32, 49, 53, 59 New Batch Class Batch Class, 39 New Document Class Document Class, 35 New Field Type Field Types, 34

0

object class, 26, 68, 117 OCR, 1, 117 ODBC, 29, 30, 31, 43, 44, 57, 59, 118 OnDemand OnDemand for AS/400, 1 OnDemand for AS/400 OnDemand, 1 Operations Navigator, 11, 22

Ρ

PC file, 68, 70 publish, 51

Q

QARLSEXCPT, 57 QARLSLOG, 57, 60 QARLSSTOR, 45 Document Store File, 69 QRDARSK, 30, 45, 46, 61, 65 QRLGBLDA BLDAPP, 69 QRLSEXIT01, 61 QRLSEXIT02, 61 QRLSRESET, 58, 60 QRLWEXITV, 81 QSAMPLES, 61 QSERVER, 59, 60 Queue, 39, 40 Index Queue, 40 Release Queue, 40 Scan Queue, 40 QUSRRDARS, 61 QZDASOINIT, 59 QZLSFILE, 59, 60

R

R/DARS

OnDemand, 1 Release, 2 Release Queue Queue, 40 Release Script, 42 Report Definition, 5, 36, 118 report group, 1, 5, 6, 8, 11 Report Management Cycle, 54, 118 Report type, 118 RSTLICPGM, 3

S

SAVOBJ, 65 Scan Queue Queue, 40 Scanning, 1 security, 28, 60, 66 SF64363, v, 62, 63 SNA, 3 Spool File Archive, 1, 3 status messages, 53 Streak removal, 118 STRMONANYS, 60, 62

Т

Table Settings, 44 TCP/IP, 3 TIFF, 1, 18, 26, 50, 118 trigger, 70, 81

U

User Exit Exit Program, 61

V

validate, 51 Validation, 1, 40, 51 Version, 118 Views, 118 VisualInfo/400, v

W

Windows 2000, 29, 59 Windows 98, 29, 59 Windows XP, 29, 59 Workstation ID, 27 WRKMSGD, 67



SC09-7602