Brainware Intelligent Capture

Solution Configuration Manager

User's Guide

Version: 1.3.x

Written by: Documentation Team
Date: Tuesday, August 13, 2019

Table of Contents

About Solution Configuration Manager

The Brainware Intelligent Capture (BIC) Solution Configuration Manager is a web-based application for the administrators of Brainware Intelligent Capture. The application serves as a user interface between a Brainware Intelligent Capture administrator and a Brainware Intelligent Capture solutions project database. This application allows you to configure and manage the database for packaged solutions provided for Brainware Intelligent Capture.

A zip file specific to the version of your packaged solution is available on the Customer Portal. It contains all available settings and is directly related to the Brainware Intelligent Capture solution and version you are configuring. This zip file is imported to the BIC Solution Configuration Manager and it allows you to manage your specific database configuration from an Internet browser rather than directly in the database.

BIC Solution Configuration Manager has the capability to configure and manage database settings and manage the database connection. When your configuration settings are complete, you export them as a migration packet. A migration packet is a file that you execute in your database. When you execute the migration packet in your database, your new configuration settings are applied to the Brainware Intelligent Capture product you are using.

Note:

Each time a configuration change is made, the admin user is required to select a migration packet to save those changes. Migration packets must be exported before logging out.If the migration packet is not exported before the admin user logs out, any tables affected by changes will be locked and unavailable to any other user.

Log in to Solution Configuration Manager

To log in to Solution Configuration Manager, complete the following steps.

If you are using Windows authentication, you will enter your domain User Name and Password.

1. Open an Internet browser and enter your BIC Solution Configuration Manager URL.
2. In the **User Name** box, confirm or enter your user name and in the **Password** box, enter your password.
3. Click **Log in**.

Manage Database Connections

The following section describes how to add, modify, and delete database connections.

Create a connection

To create a database connection, complete the following steps.

1. In the navigation bar, click **Manage Project Configuration > Manage Database Connection**.
2. In the **Manage Database Connection Settings** page, in the empty connection row, complete the following substeps.

   1. In the **Connection Number** field, type a unique connection number.
   2. In the **Provider Type** list, select **System.Data.SqlClient** for a Microsoft SQL Server provider, or **Oracle.DataAccess.Client** for Oracle provider.
   3. In the **Server Name** field, type the server name.

      > **Note:** For Oracle connections, the naming convention is <server name>/<Service name|SID>.

   4. In the **Database Name** field, type the database name to which you want to connect.

      > **Note:** For Oracle connections, leave this field blank.

   5. In the **User Name** field, type your user name.
   6. In the **Password** field, type your password.
   7. Optional. To use Integrated Security with Microsoft SQL Server, select the check box instead of entering a **User Name** and **Password**. This setting is disabled if the **User Name** and **Password** fields are populated.
3. Click **Test Connection**.
4. To save the connection settings, click the **Insert** link.

Edit a connection

To edit the settings for a database connection, complete the following steps.

1. In the navigation bar, click **Manage Project Configuration** > **Manage Database Connections**.
2. In the **Manage Database Connection Settings** page, locate the connection you want to modify and click **Edit**.
3. Edit the connection settings and click the **Update** link.

Delete a connection

To delete a database connection, complete the following steps.

1. In the navigation bar, click **Manage Project Configuration > Manage Database Connections**.
2. In the **Manage Database Connection Settings** page, locate the connection you want to delete and click the **Delete** link.
3. In the **Delete database records** confirmation dialog box, click **Yes**.

Manage packages

This section describes how to add a package, de-activate, and delete a package.

Add a package

A package is a project settings ZIP file that contains an XML and an SQL file. The XML file defines the available settings for your configuration. The SQL file contains DML queries related to new language settings for the new package. To add a package, complete the following steps.

1. In the navigation bar, click **Manage Project Configuration > Manage Existing Package**.
2. In the **Add a new package** section, click **Choose File**, locate the project settings ZIP file, and click **OK**.
3. To activate the project, select the **Activate package** check box . This is selected by default.
4. Click **Add new package**.

Delete a package

To delete a package, complete the following steps.

1. In the navigation bar, click **Manage project configuration**> **Manage existing package**.
2. Under **Existing packages**, select a package row and click **Delete**.
3. In the **Delete database records** dialog box, click **Yes**.

Deactivate a package

You can deactivate packages that have been added to BIC Configuration Manager. To deactivate a package, complete the following steps.

1. In the navigation bar, click **Manage Project Configuration > Manage Existing Package**.
2. From the **Existing Packages** section, select the package row and deselect the **Active** check box.
3. In the **Confirm deactivation** dialog box, click **Yes**.

Manage Project Settings

This section describes how to configure the project settings.

View project settings

To view the SCM project and its corresponding settings, complete the following steps.

1. In the navigation bar, click **Configure Project**.
2. In the **Configure Project** page, select an SCM project, setting, and profile from the appropriate lists.

> **Note:**

The **Profile** list does not display when you select the **Global Settings** or **Client Settings** from the **Settings** list.

Note:
You can create a new profile by copying an existing profile and you can filter the project settings.

Filter a profile list

To filter the list of settings based on conditions, complete the following steps.

1. In the navigation bar, click **Configure Project**.
2. In the **Configure Project** page, complete the following substeps.
    1. From the **Project** list, select a project.
    2. From the **Settings** list, select a profile settings group.
    3. Click **Filter**.
3. In the **Filter Criteria** dialog box, double click the column names and operators from the appropriate lists to create your condition. The **Filter Conditions** field is populated with the value provided in the **Settings** field.

    Example For more information on how to create filter conditions, refer to the Filter Conditions section in this document.
4. Click **Apply**. The filtered profile list is displayed.

Filter Conditions

Filter Conditions are created by combining settings with filter criteria. The following table explains the filter conditions that can be created based on the values provided in the Settings field.

Settings Value	Filter Condition
If, number	Then,`=, >, <, >=, and <=` can be used to create the filter condition.Example: [EXPProfileID] > 2. This will fetch results of all profiles where the export profile ID is greater than 2.
If, text	Then, `=, >, <, >=, <=, and LIKE`can be used to create the filter condition.Example: [ProfileName] LIKE 'FIL%'. This will fetch results of all profile names starting with the letters FIL. **Note:** The text constant value should be written within single quotation marks. The test filter conditions

Settings Value	Filter Condition
	are not case sensitive. The wild card '%' can be used to mask one or more characters.
If, boolean	Then, the value provided in the Settingsfield itself is the filter condition. You can also use the filter operator `NOT` to create the Filter Condition. Example: NOT [ExportToDB]. This will fetch results of all profiles that are not flagged for database export. **Note:** You can combine multiple filter operators such as, `AND, OR, NOT` etc in order to create more complex filter conditions.

Copy a profile setting

You can copy the settings of an existing profile to a new profile. To copy the profile settings, complete the following steps.

1. In the navigation bar, click **Configure Project**.
2. In the **Configure Project** page, select a project, setting, and profile from the appropriate lists.
3. Click the **Copy Profile** button.
4. In the **Copy profile** dialog box, provide a **Profile ID**, **Profile Name**, and **Profile Description**.
5. Click **Save**.

Add setting data

You can add setting information for the BIC packaged solution configuration databases of Brainware for Invoices and Brainware for Transcripts. The available settings depend on the type and version of your configuration database that is in BIC Solution Configuration Manager.

Specific information about the database settings is included in the BFI and BFT documentation for different database options. To add setting data, complete the following steps.

1. In the navigation bar, click **Configure Project**.
2. In the **Configure Project** page, select a project, setting, and profile from the appropriate lists.

   The **Profile** list is not available for **Global** or **Client** settings.

3. Select a setting from the left pane.
4. In the empty setting row, type or select the data that you want to add to the setting table and click the **Insert** link.

   This is only valid, if an indexed setting is maintained. Other settings are not displayed in a table.

5. In the **Select a packet** dialog box, under **Select destination packet**, select one of the following options.
   - **Create new packet**
   - **Select one existing packet**
6. Type a description for the packet.
7. Optional. Select **Use the same packet for entire session** to automatically use this packet for the current session.
8. Click **Save**.

Edit a setting

You can edit settings for your BIC packaged solution configuration database (Brainware for Invoices/Brainware for Transcripts) if it has been imported to the BIC Solutions Configuration Manager. The available settings depend on the type and version of your Brainware Intelligent Capture database. To edit a setting, complete the following steps.

Specific information about the database settings is included in the BFI or BFT documentation for the different database options.

1. In the navigation bar, click **Configure Project**.
2. In the **Configure Project** page, select a project, setting, and profile from the appropriate list.

   > **Note:** The **Profile** list is not available for **Global** or **Client** settings.

3. Select a setting from the left pane.
4. Modify the setting configuration and click **Save**.
5. In the **Select a packet** dialog box, under **Select the destination packet**, select one of the following options.
   - **Create new packet**
   - **Select one existing packet**
6. Type a description for the packet.
7. Optional. Select **Use the same packet for entire session** to automatically use this packet for the current session.
8. Click **Save**.

Delete record data

You can delete settings from your BIC packaged solution configuration database (Brainware for Invoices/Brainware for Transcripts) if it has been imported to the BIC Solutions Configuration Manager. The available settings depend on the type and version of your packaged solution configuration database. To delete a record from the project, complete the following steps.

Specific information about the database settings is included in the BFI and BFT documentation for the different database options.

1. In the navigation bar, click **Configure Project**.
2. In the **Configure Project** page, select a project, setting, and profile from the appropriate list.

> **Note:** The **Profile** list is not available for **Global** or **Client** settings.

3. Select a setting from the left pane.
4. Select a setting configuration row that you want to remove and click **Delete**.
5. In the **Delete database records** dialog box, verify you want to remove the row and click **Yes**.
6. In the **Select a packet**dialog box, select one of the following options.
   - **Create new packet**
   - **Select one existing packet**
7. Type a description for the packet.
8. Optional. Select **Use the same packet for entire session** to automatically use this packet for the current session.
9. Click **Save**.

Copy configuration settings

You can copy a setting configuration to create a new row in your BIC packaged solution configuration database (Brainware for Invoices/Brainware for Transcripts) database if you imported the configuration to the BIC Solutions Configuration Manager. The available settings depend on the type and version of your packaged solution configuration database. To copy a setting configuration to a new row, complete the following steps.

Specific information about the database settings is included in the BFI and BFT documentation for the different database options.

1. In the navigation bar, click **Configure Project**.
2. In the **Configure Project** page, select a project, setting, and profile from the appropriate list.

> **Note:** The **Profile** list is not available for **Global** or **Client** settings.

3. Select a setting from the left pane.
4. Select a setting configuration row that you want to copy to a new row.
5. Click **Copy Data**.

   The system populates data in the new row.
6. Click the **Insert** link.
7. In the **Select a packet** confirmation box, complete one of the following options.
   - To create a new packet, select the **Create a new packet** option, enter a description for the packet, and click **Save**.
   - To select an existing packet, select the **Select from list of existing packets** option, enter a description for the packet, and click **Save**.

> **Note:** To use the same packet for the entire session, select the check box.

8. Click **Save**.

Select a migration packet

The BIC Solution Configuration Manager allows you to create or select an existing migration packet each time you edit database settings. You can then use the migration packets to migrate the changes in a target environment. To select a new or existing packet, complete the following steps.

1. In the **Select a packet**dialog box, select one of the following options.
   - **Create new packet**
   - **Select existing packet**
2. Type a description for the packet.
3. Click **Save**.

Manage Project Configurations

This section describes how to manage project configurations.

Create an SCM project configuration

To create an SCM project configuration, complete the following steps.

1. In the navigation bar, click **Manage Project Configuration**.
2. In the **Manage Project Configuration** page, in the empty project row, complete the following substeps.
   1. Type a project name in the **Project Name** field.
   2. From the **Package** list, select a package.
   3. From the **Version** list, select the version number.
   4. From the **Connection Group** list, select a connection number.
   5. Optional. SCM Projects are active by default. To deactivate the project, clear the check box in the **Active** column.
3. Click the **Insert** link.

Edit an SCM project configuration

To edit an SCM project configuration, complete the following steps.

1. In the navigation bar, click **Manage Project Configuration**.
2. In the **Manage Project Configuration** page, select a project row, and edit the following settings.
   - **Project Name**
   - **Package**
   - **Version**
   - **Connection Group**
   - **Active status**
3. Click **Save**.

Delete an SCM project configuration

To delete an SCM project configuration, complete the following steps.

1. In the navigation bar, click **Manage Project Configuration**.
2. In the **Manage Project Configuration** page, select a project row and click **Delete**.
3. In the **Delete database records** confirmation dialog box, click **Yes**.

Export packaged project configuration data

A package helps you to save your project configurations. Exporting packaged project configuration data before logging out of SCM enables other admin users to access and modify the elements which you had configured. Otherwise, the elements that you configured or created remain locked and unavailable to other admin users. To export packaged project configuration data, complete the following steps.

1. In the navigation bar, click**Export Project Configuration.**
2. In the **Export Project Configuration** page, under **Location**, the **Packet Migrate Location** box displays the location to which the packet is exported.
3. Under **Packet Selection**, complete the following actions.
    1. From the **Package** list, select a package.
    2. From the**Version** list, select a version.
    3. From the **Project** list, select the project.
4. Select the row for the packet you want to export and click **Migrate Selected Packets.**
5. In the **Migration Status** confirmation dialog box, click **OK**.

Import packaged project configuration data

You can import packaged project configuration data from an existing system. To import a project configuration, complete the following steps.

1. In the navigation bar, click**Import Project Configuration.**
2. On the **Import Project Configuration** page, the **Location** box specifies the location from where the project configuration is imported.
3. Under **Packet Selection**, perform the following actions.
    1. From the **Package** list, select a package.
    2. From the**Version** list, select a version.
    3. From the **Project** list, select the project.
4. From the **Source Project** list, select the source project. The system displays the packets associated with the project.
5. From the **Target Project** list, select the project where you want to import the configuration.
6. Select the packet row and click **Import Selected Packets**.
7. In the **Import status**confirmation dialog box, click **Yes**.