Brainware Intelligent Capture Solution Configuration Manager

User Guide

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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. Migration packets can be imported to the same or a different environment, for example, from Test to Production. It is also possible for a DBA to use the migration packet and execute the packet contents directly into 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. By default, migration packets should 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**.

Note:

In your previous session, if you logged out of SCM without exporting the database settings in a migration packet, a message is displayed prompting you to unlock the associated fields by exporting the packets. Click **Close** to close the message box and continue logging on to SCM.

Configure Project

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 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 a BIC packaged solution configuration database (i.e. Brainware for Invoices or Brainware for Transcripts). The available settings depend on the type and version of your configuration database. Specific information about the database settings is included in the documentation for the selected packaged solution (i.e. Brainware for Invoices, Brainware for Transcripts, etc.).

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 the appropriate SCM package has been imported to the BIC Solutions Configuration Manager. The available settings depend on the type and version of your Brainware Intelligent Capture database.

Specific information about the database settings is included in the documentation for the selected packaged solution (i.e. Brainware for Invoices, Brainware for Transcripts, etc.).

> **Note:**
> All existing and newly created passwords in the solution configuration database settings are masked during display.

To edit a setting, 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 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 (i.e 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.

Specific information about the database settings is included in the documentation for the selected packaged solution (i.e. Brainware for Invoices, Brainware for Transcripts, etc.). To delete a record from the project, 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 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 (i.e 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.

Specific information about the database settings is included in the documentation for the selected packaged solution (i.e. Brainware for Invoices, Brainware for Transcripts, etc.). To copy a setting configuration to a new row, 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 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**.

Manage Projects

This section describes how to manage project configurations, existing packages and database connections.

Manage Project Configurations

This section describes how to create new project configurations, modify existing project configurations and delete project configurations.

Create an SCM project configuration

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

1. In the navigation bar, click **Manage Projects**.
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 Projects**.
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 Projects**.
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**.

Manage Existing Package

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 Projects > 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 Projects**> **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 Projects > 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 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.

Prerequisite

To be able to connect to an Oracle database, you need to install OracleDatabaseAccessComponents (ODAC) for the installed Oracle client and configure it for odp.net4.

Note:

It is recommended that the Oracle.ManagedDataAccess.dll is registered for the .Net 4 assemblies.

BIC Solution Configuration Manager needs access to the configuration database of the projects. These connections settings should be configured for each project you wish to configure. The SCM configuration database and the Solution configuration database must be on the same database platform.

Note:

The SCM Installer has been updated to include the latest OLE DB provider for SQL Server supporting TLS 1.2.

To configure database connections:

1. In the navigation bar, click **Manage Projects > 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 **Microsoft OLE DB Provider for SQL Server** for SQL, or **Oracle.DataAccess.Client** for Oracle.

> **Note:**
> The latest OLE DB provider (Microsoft OLE DB Driver for SQL Server) is only available if you download and up-date the SQL Server driver to Microsoft OLE DB Driver for SQL Server (msoledbsql).

3. In the **Server Name** field, type the server name.

> **Note:** For Oracle connections, the naming convention is `<server name | IP address>/<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**. A confirmation message is displayed.
4. Click **OK**.
5. 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 Projects** > **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 Projects > 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**.

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.

> **Note:**
> Tables that contain sensitive information such as, passwords cannot be exported to a packet. A message is displayed on the relevant page that contains such tables.

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**.

    > **Note:**
    > If another SCM user has modified, but not exported the database settings in a migration packet, the associated fields are not available to you for editing. A message is displayed stating that the tables are locked for editing along with the names of the users. You can continue making changes to the rest of the fields and tables.

Import packaged project configuration data

You can import packaged project configuration data from an existing system. You can also import configuration packets created in a previous version of SCM. 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.

> **Note:**
>
> Packets created in an Oracle environment can only be imported into an Oracle environment. Packets created in a Microsoft SQL Server environment can only be imported into a Microsoft SQL Server environment.

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** box, click **Yes**.

Log out of Solution Configuration Manager

To log out of Solution Configuration Manager, complete the following step.

- On the upper-right corner of the window, click Logout.

> **Note:**
>
> After 10 minutes of inactivity, the Solution Configuration Manager displays a timeout warning message. Click **Yes** to continue working in the same session. If you are manually logging out of SCM without exporting the database settings in a migration packet, a message is displayed prompting you to unlock the associated fields by exporting the migration packets. Click **Close** to close the message box and continue logging off from SCM.