A403: System Administration Manual

Version 2
March 11, 2005

Prepared by:
Deloitte
2868 Prospect Park Drive, Suite 400
Rancho Cordova, CA 95670

3 SIS Components Administration

This chapter describes the information and procedures to administer the software components of the SIS application. This includes instructions for maintaining and updating online utilities and address verification software; reviewing, modifying, and individually running batch operations; setting up the imaging component, and obtaining system reports.

ITSD is responsible for administering hardware, operating system (first tier software), and monitoring/performance tools (second tier software).

3.1 Online Application

Administrators (and users) can run the SIS application online through a web browser interface. Because, administrators have higher security privileges than other users, SIS provides complete functional access to certain utilities. Address verification software is also detailed below, including installation, update, and verification procedures. The software's database of address information must be updated periodically by the administrator.

3.1.1 IT Utilities

The SIS application contains more than one hundred individual information and control screens. The **SIS User Manual** contains detailed descriptions and procedures for their use. A selected subset of these screens is included within this document. This subset includes screens for which GDB IT Administrators have security rights (*GDB IT-Administrator Security Group*) beyond those of any other users, or for which their applicability to IT use merits their presence here. Access these SIS screens from the **Utilities** menu tab.

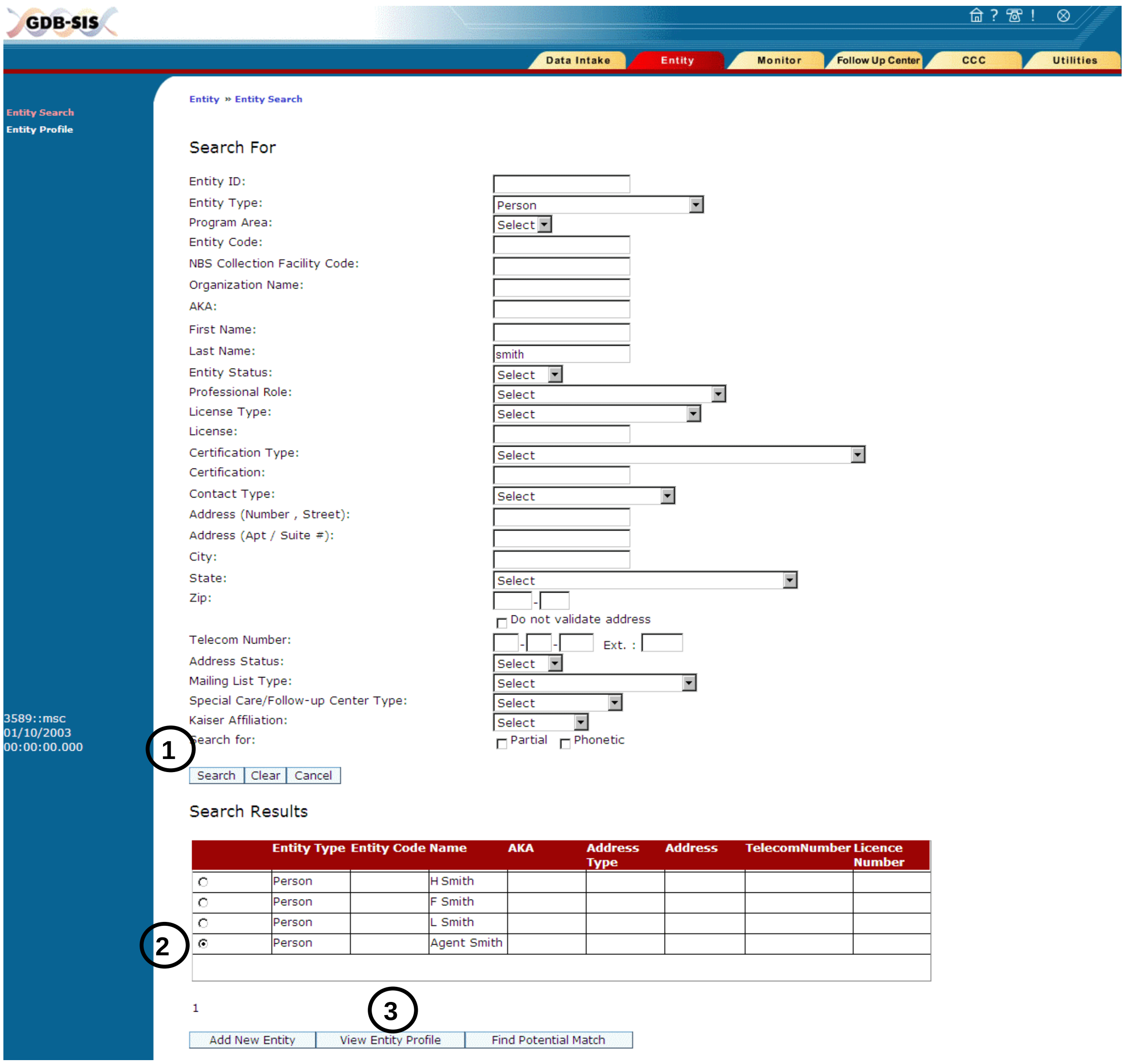
> ***Note: Refer to the System Design Deliverable document*** **Security_Matrix.xls** ***for the complete system security matrix. The CD distributed with this SIS Administrator Manual contains*** **Security_Matrix.xls** ***in electronic format, current as of this manual's publication date.***

To View Entity Relationships

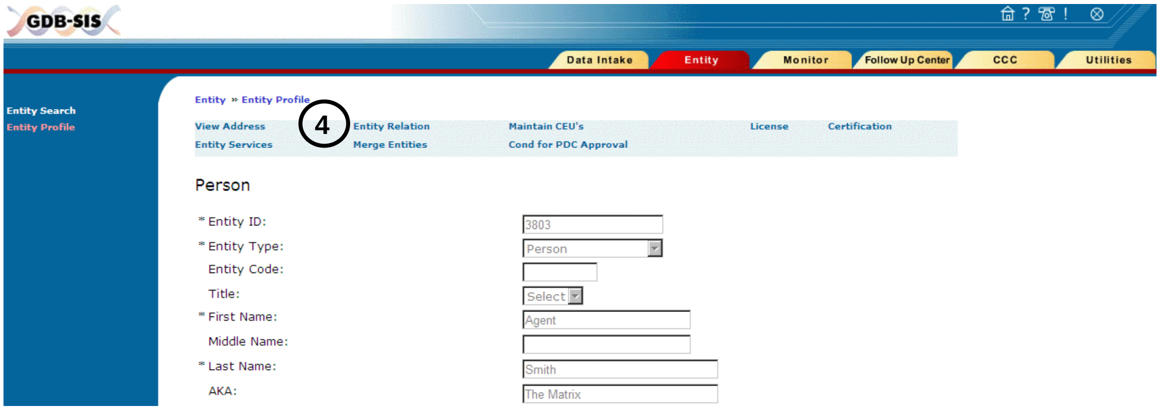
1 Click the **Entity** tab. The **Entity Search** screen appears. Specify suitable search criteria for finding the desired entity, then click the **Search** button.

2 The **Search Results** grid appears at the bottom of the screen. Select the desired entity from the grid.

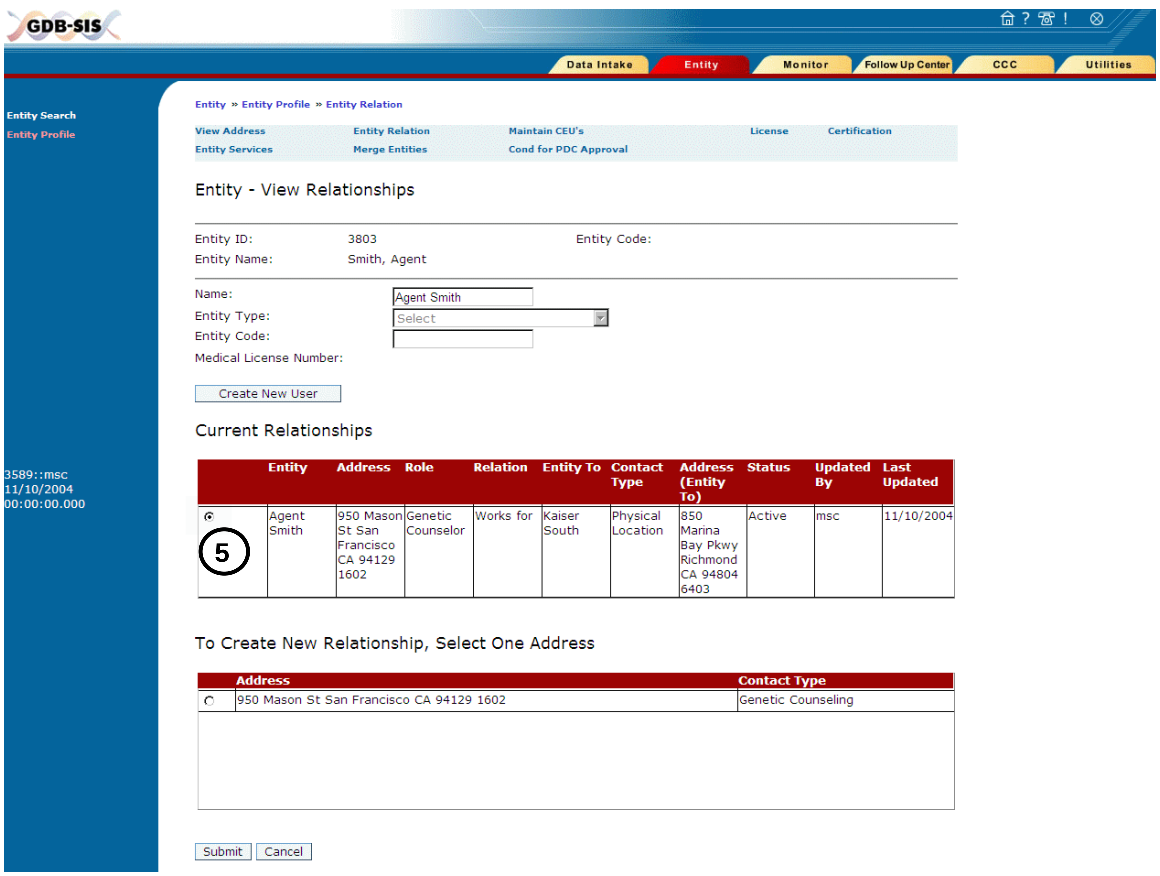
3 Click the **View Entity Profile** button.



4 The **Entity Profile** screen appears. Click the **Entity Relation** third level menu.



5 The **Entity Relation** screen appears. View the listing, or select one from the **Current Relationships** grid, then click the **Submit** button to further review or edit the relationship.

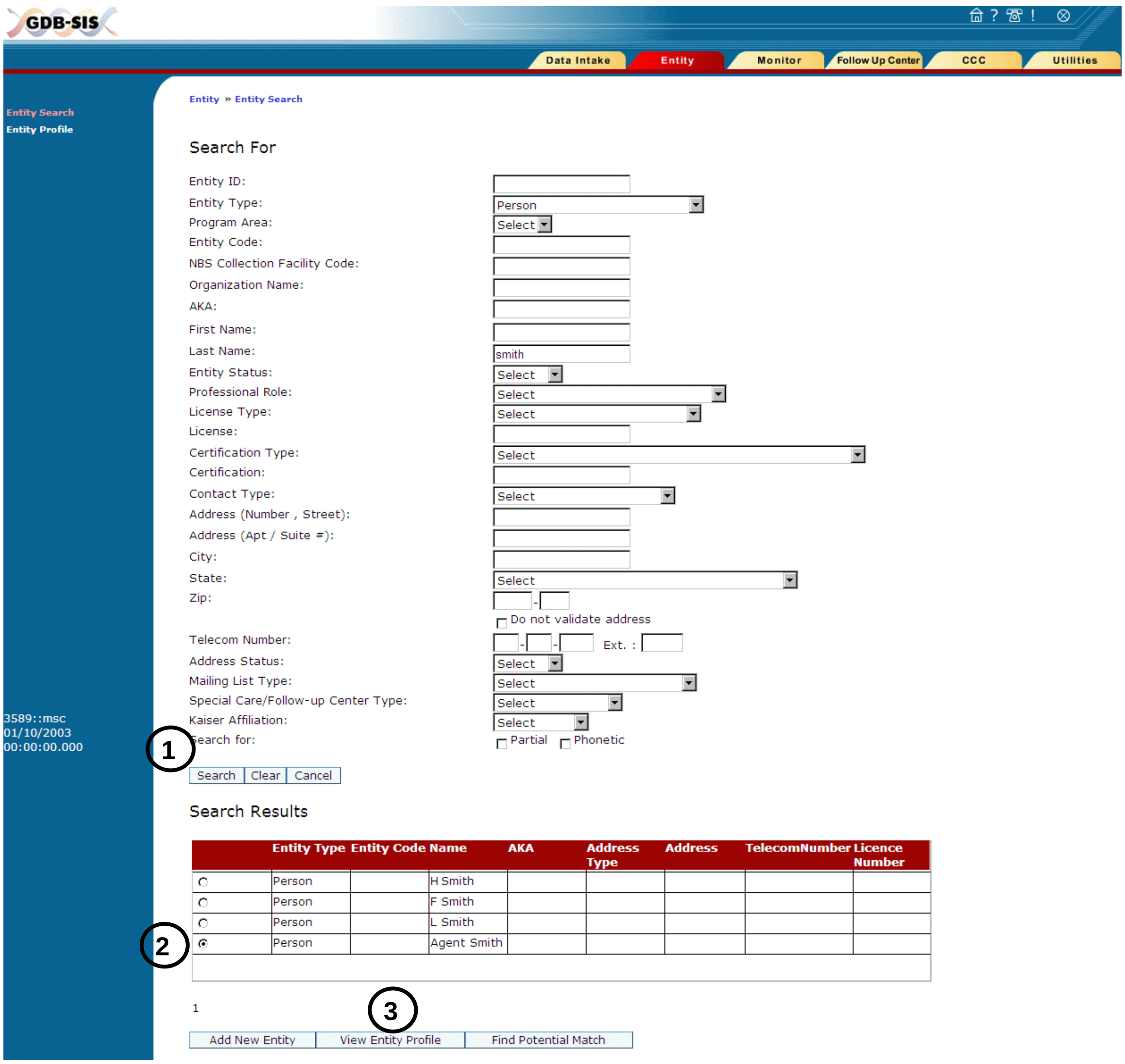


To Add a New Entity Address or Edit an Existing Entity Address

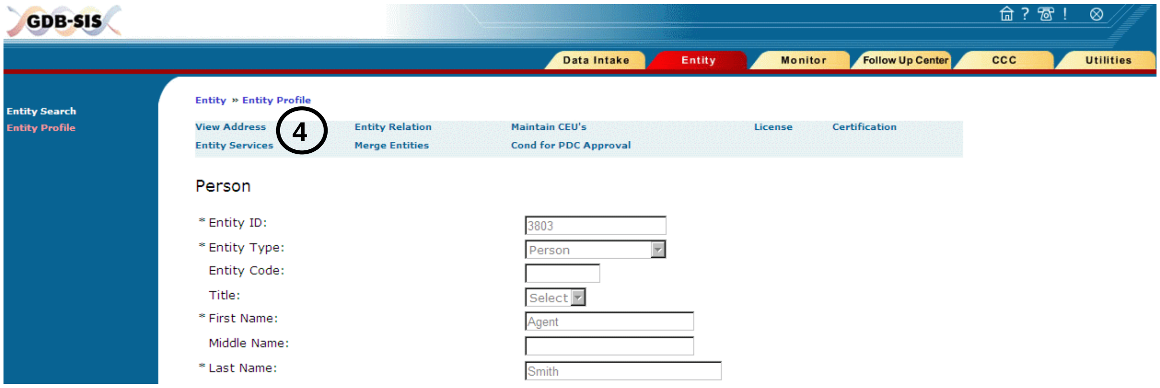
1 Click the **Entity** tab. The **Entity Search** screen appears. Specify suitable search criteria for finding the desired entity, then click the **Search** button.

2 The **Search Results** grid appears at the bottom of the screen. Select the desired entity from the grid.

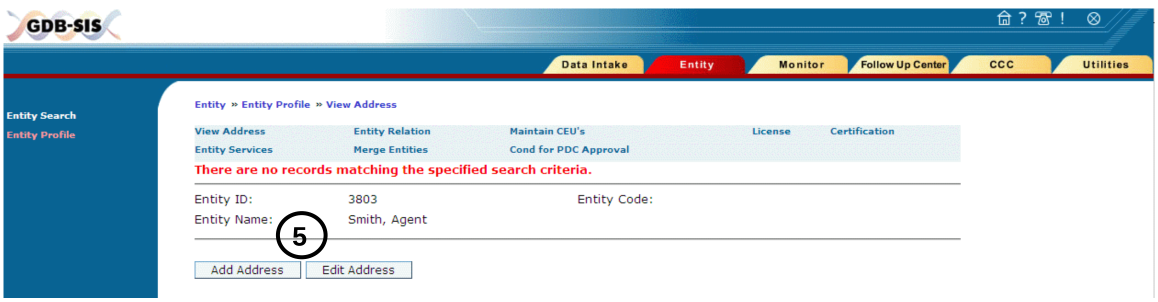
3 Click the **View Entity Profile** button.



4 The **Entity Profile** screen appears. Click the **View Address** third level menu.



5 The **View Address** screen appears. Click the **Add Address** button to add the entity's address, or the **Edit Address** button to edit an entity's existing address.



6 The **Add/Edit New Address** screen appears. Select the **Program Area** (or **None**.)

7 Select the **Contact Type**.

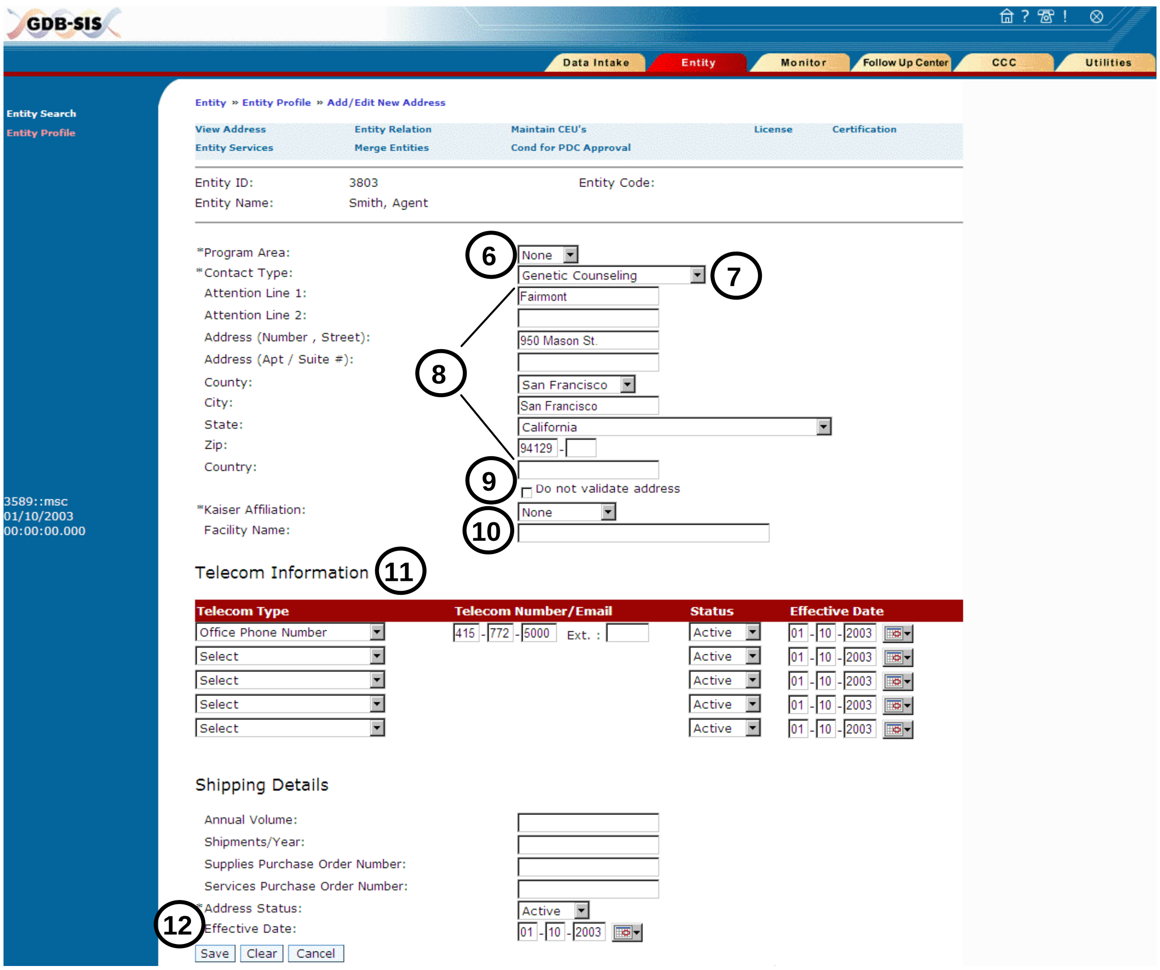
8 Enter the address data.

9 Select the **Do not validate address** check box if you do not want the *ZIP+4* address validation software to validate the address.

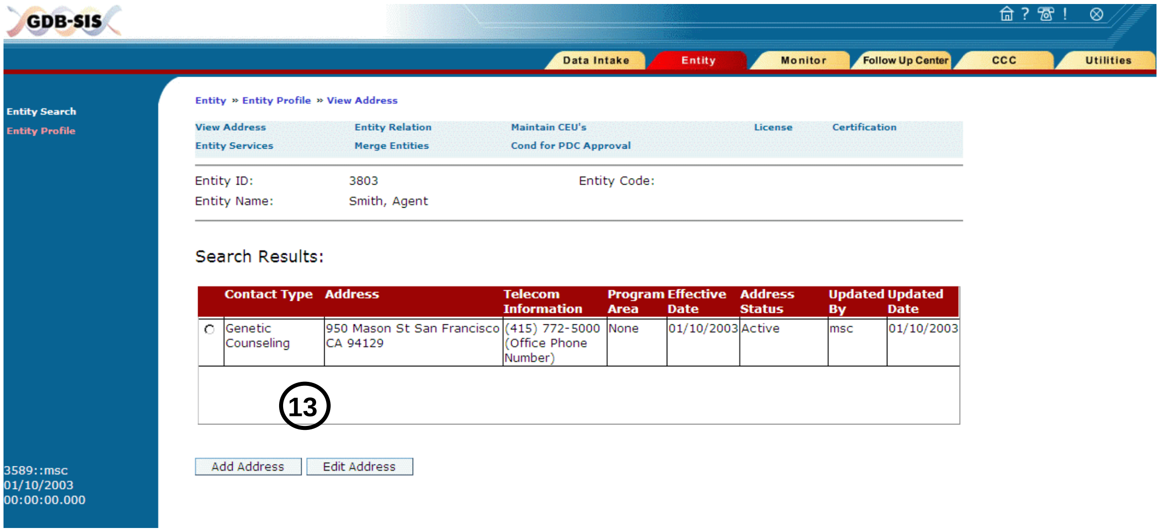
10 Select the **Kaiser Affiliation** (or **None**.)

11 Enter **Telecom Information** if available.

12 Click the **Save** button to save the **Add/Edit New Address** screen's information.



13 The **Add/Edit New Address** screen reappears displaying the address information. Click the **Edit Address** button to edit the displayed information if necessary.



5 Software Deployment Procedures

5.1 Online Application and Batch Jobs

A SIS application administrator can deploy changes that fall into two broad categories:

- Application Changes
- Database Changes

5.1.1 Application Changes

To make any modifications to the SIS application, including batch or interface programming, the developer must have an appropriate development environment. The workstation setup must include Microsoft Visual Studio .NET 2003, Microsoft Visual SourceSafe, and Microsoft SQL Server client. The developer must also be well versed in the following products and tools:

- Microsoft Visual Studio .NET 2003
- VB.NET
- Web Services
- XML
- SQL
- Object Oriented Programming

In making any changes to the application, the developer must point to the correct Visual SourceSafe project, and follow proper procedures once changes are made so that all changed files are promoted to test and production environments.

All code and database structure changes require creation of a new build. For more information about creating a *build*, refer to the document *A104 – Software Build Procedure* and *SIS Build Process for Development.*

5.1.2 Database Changes

Only a qualified Database Administrator may make changes to the database. The Application Manager must approve any changes to the database, as they have a far-reaching effect on the application, and should be made very carefully. It is expected that developers will continue to make changes to stored procedures, and that the Database Administrator will promote these changes.

Because SIS has two reporting databases with ETLs, any database structure change affects the CRDB database structure and may affect the BO database structure. Any database structure changes in SIS OLTP may require replication in the database structure *reporting* instances.

All changes to the application, including changes that are data-only related, *e.g.* changes to the Interpretation Parameters tables, must be tested in the Development/Test environment, and only after thorough testing should they be approved for production deployment. All database changes, including data-only changes must be performed manually by a Database Administrator, and are *not* done automatically.

All promotions to different environments must be performed in a synchronized manner and require that the application to be stopped for maintenance.

The administrator performs other maintenance tasks including clearing log files from the database server, removing results files from the batch server after they have been processed, and removing temporary files used for creating faxes. The location of the files is as follows:

Files	Location
Database log files	D:\MSSQL\log\
Fax Files	<SIS online path>\fax
Interface Files	Configurable location in the Application Table T_UTL_INTERFACE_CONFIG
Processed Interface Files	Same location as item above under the \processed folder

5.1.3 To Create a New Screen in the SIS Application

The following procedure creates a new screen in the SIS application. As the steps involved may be difficult to appreciate in the abstract, for the purpose of demonstration assume that the steps create a *Provider Search* screen.

Note: Observe the developer requirements in the Application Changes section above.

1 From the SIS application screens inventory, obtain a **New Screen ID**, and reserve it for the new screen. For this example, consider the screen ID to be *250*.

2 Within the Visual Studio .NET environment, add New files to the solution per the screen's requirements. At least one ASPX file must be added to the **SIS.UserInterface** project (*e.g.* **ENT_ProviderSearch.aspx** under the **Entity** folder). Set the screen ID property (an integer) in the **Page_Init** event of the *code behind* file as follows:

```
ScreenId = 250
```

Note: You can reuse existing Controller, Web Service, and Business Class files.

3 Configuration Settings in the **web.config** file under the **SIS.UserInterface** project.

a **Define the controller** in the event that you have created a new controller class. For example, in the CONTROLLER CONFIGURATION section include:

```
<controller name="CCProviderSearch"
     type="SIS.UserInterface.Controller.CCC.CCProviderSearch,
```

```
SIS.UserInterface,
Version=1.0.1.0,Culture=neutral,PublicKeyToken=null"/>
```

b **Define the View/Navigation Node.** For example, specify **ENT_ProviderSearch** as the **View Name**, which also can be called as the **Navigation Node**. For example, in the **views** section include:

```
<view name="ENT_ProviderSearch"
    type="Entity/ENT_ProviderSearch.aspx"
    controller="CCProviderSearch"/>
```

c **Create the Navigation Graph.** Assuming that **Provider Search** (on the third level menu screen) is accessible from the **Search Entity** screen (on the second level menu screen), create the navigation graph from the menu as well as from the **Search Entity** screen.

i Add a new (first) screen in the navigation graph from the **SIS_MENU**. For example, add the following line under the `<node view="SIS_Menu">` section.

```
<navigateTo navigateValue="ENT_ProviderSearch"
    view="ENT_ProviderSearch"/>
```

ii Add a new screen in the navigation graph from Entity Search. For example, add the following line under the `<node view="ENT_SearchEntityProfile">` section.

```
<navigateTo navigateValue="ENT_ProviderSearch"
    view="ENT_ProviderSearch"/>
```

iii Create the navigation graph for **Provider Search**, the new screen in the executable. There must be navigation to the **View Entity Address** screen, and particularly, there must *always* be a **Default Navigation** to the menu. For example:

```
<node view="ENT_ProviderSearch">
    <navigateTo
    navigateValue="ENT_ViewEntityAddress"
    view="ENT_ViewEntityAddress"/>
    <navigateTo navigateValue="SIS_Menu"
    view="SIS_Menu"/>
</node>
```

4 Log on to **SQL Server** and open the **Enterprise Table Manager**. Create a new entry in **T_UTL_APPLTN_SCRN_MENU**. This table contains master details of all screens in the application. Create a new record with the following details (for example):

Column	Value
PK_SCRN_ID	Screen Id = 250
MDUL_CODE	Module Code = “ENT”
MENU_LVL	Menu Level = 3
MENU_TXT	Text which will appear in menu = “Provider Search”
MENU_URL	View Name/Navigation Node = “ENT_ProviderSearch”
MENU_TOOL_TIP	Tool tip which appears when you move mouse over the menu link in application = “Search for Provider”. This can provide additional information regarding the screen.
CRTD_BY	Created by user’s ID = 1

Column	Value
CRTD_DT	Created date = Today's date
UPDTD_BY	Updated by user's ID = 1
UPDTD_DT	Updated date = Today's date

5 Link the screen to the parent screen, **T_UTL_APPLTN_SCRN_GRAPH**. This table links the new screen with the parent screen. Create a record to link the new screen with the parent screen; for example, linking **Provider Search** with the Parent screen **Entity Search** (screen ID 55). Include the details, for example:

Column	Value
PK_PARENT_SCRN_ID	Parent screen ID = 55
PK_FK_SCRN_ID	New screen ID = 250
MENU_ORDR	Display order for new screen under parent screen = 1
CRTD_BY	Created by user's ID = 1
CRTD_DT	Created date = Today's date
UPDTD_BY	Updated by user's ID = 1
UPDTD_DT	Updated date = Today's date

6 Within the SIS Online Application, use the Page Security Screen (Screen 140) to assign the necessary permissions to the Security Groups that must access the new screen.

7 Using Visual Studio .NET, build the application and check the screen.

- **a** Build the application.
- **b** Log on to the SIS application as a user from the intended security group intended (or create a new user within the group.) The user must have security permissions for access to the newly created screen and the **Entity Search** screen.
- **c** Navigate to the **Entity Search** screen, and verify the presence of the new screen. For example, verify the third level menu link to **Provider Search**.
- **d** Click the third level menu link; for example, **Provider Search**. The screen's appearance indicates the successful creation of the new screen within the SIS application and that all required settings are present.

8 Update the help content. For information about creating help content, refer to section 5.4 starting on page 128.

After completing the steps above, use ITSD code promotion process to deploy the modification into the different SIS environments (Development, Test, and Production).

5.2 Imaging Component

This section explains the procedure for initially deploying the Custom Imaging Release Scripts. Use the same procedure to modify existing release scripts.

A *Custom Imaging Release Script* is a software program that extracts data from a scanned image into a format-specific file for further OCR processing.

To make any modifications to the Custom Imaging Release Scripts, the developer must have an appropriate development environment with installed copies of Microsoft Visual Studio 6.0 and Microsoft Visual SourceSafe. The developer must also be well versed in the following products and tools:

- Microsoft Visual Studio 6.0
- Object Oriented Programming
- Dynamic Link Libraries

Installing Custom Form Release Scripts

Installation involves four operations:

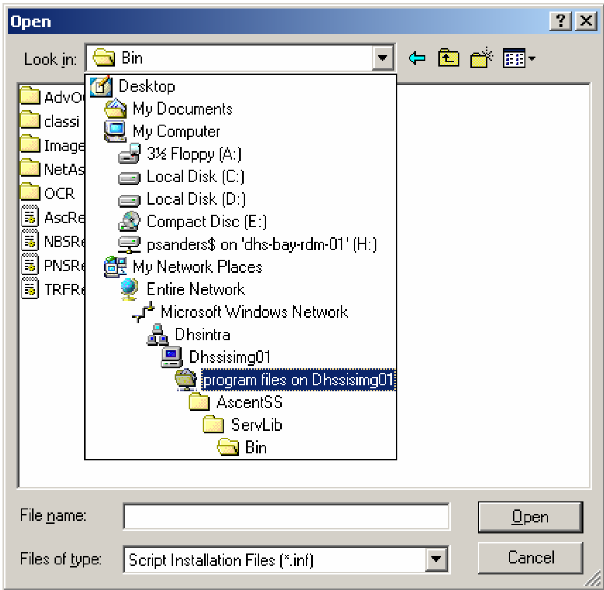
- Copying DLL & INF files
- Installing Release Scripts
- Importing Batch Classes
- Publishing Batch Classes

Copying DLL & INF Files

The Release Scripts folder found on the Installation CD provided with this guide contains a *DLL* and *INF* file for each form in the SIS application. These must be copied into the *Ascent Central Server Bin* directory before registering the associated release scripts.

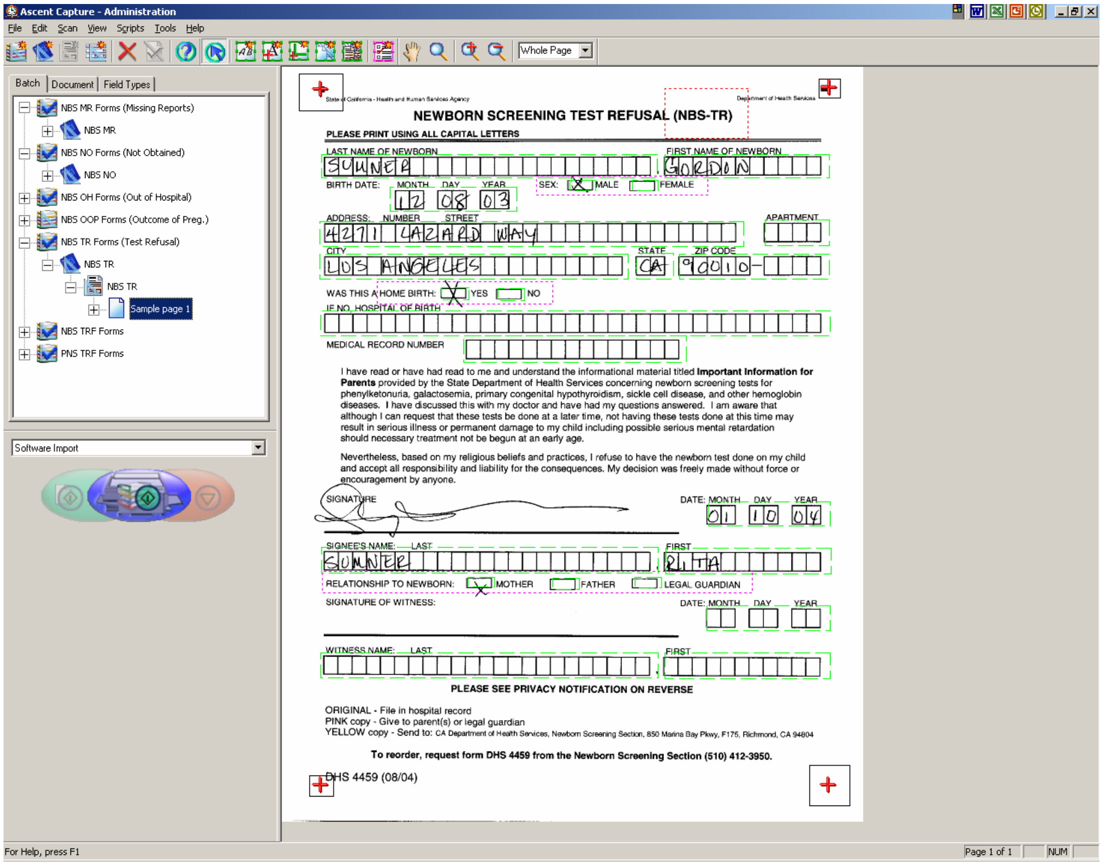
Form Name	DLL File	INF File
NBS MR FORM	NBSMRREL.DLL	NBSMRREL.INF
NBS NO FORM	NBSNOREL. DLL	NBSNOREL.INF
NBS OH FORM	NBSOHREL.DLL	NBSOHREL.INF
NBS TR FORM	NBSTRREL.DLL	NBSTRREL.INF
NBS TRF FORM	NBSREL.DLL	NBSREL.INF
PNS TRF FORM	PNSREL.DLL	PNSREL.INF

Place the above files with their accompanying DLLs on the servers (e.g. DHSSISIMG01) in the following Bin directory: program files on <server>\AscentSS\ServLib\Bin.

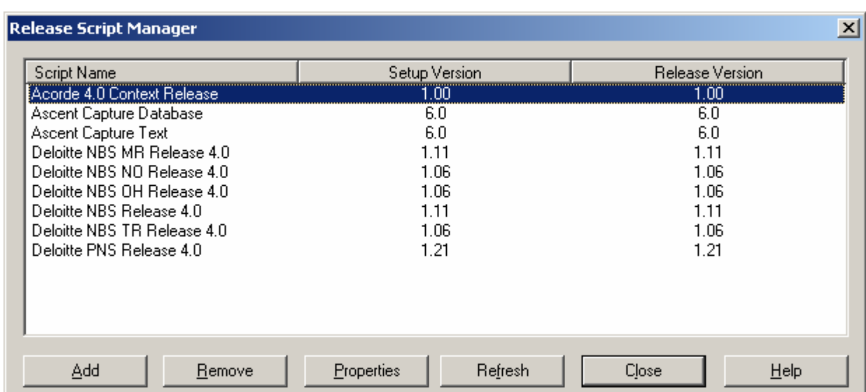


Installing Release Scripts

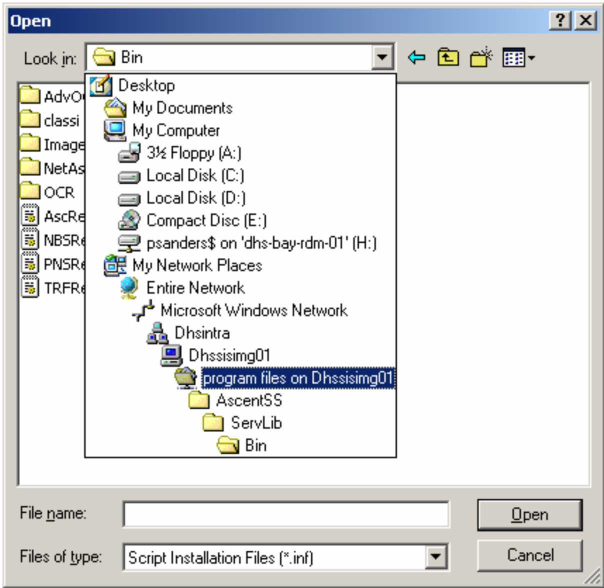
1 From the Ascent Central Server (e.g. *DHSSISIMG01*), start the *Kofax Administration Module*. At the **Start** menu, choose > **Program** > **Ascent** > **Capture 6.1** > **Administration**.



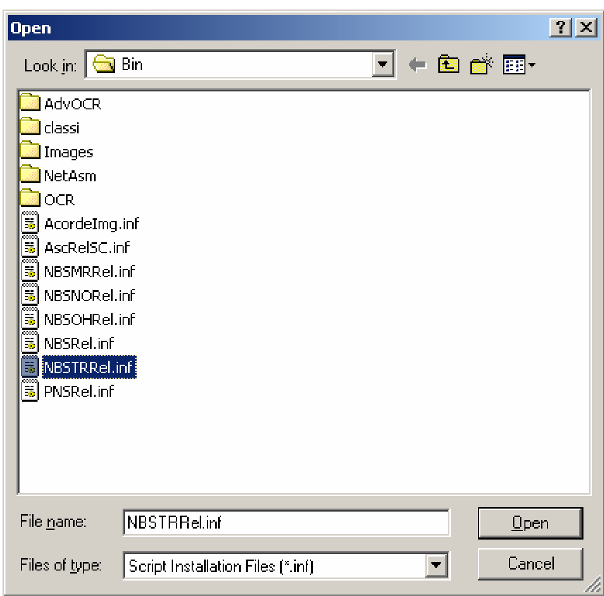
2 In the **Ascent Administrator**, from the **Tools** menu, choose **Release Script Manager**. The **Release Script Manager** dialog box appears. Choose the **Add** button.



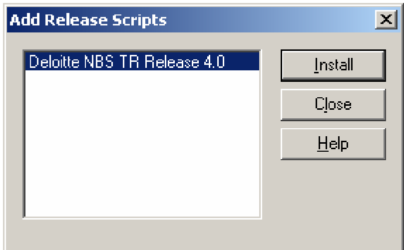
3 Select the **Bin** folder to display the **Inf** files.



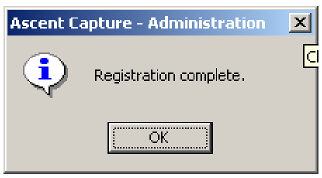
4 Select the desired release script to install. For `NBSTR` the release script name is `NBSTRREL.INF`. Click **Open**.



5 In the **Add Release Scripts** dialog box, highlight the release script to install and click **Install**.



6 On completion, a confirmation message appears. Click **OK**, then click **Close** in the **Add Release Scripts** dialog box.



7 Repeat this *Release Scripts Installation* process for each release script provided on the installation CD.

Import Batch Classes

The Installation CD in the Batch Class folder contains Batch Class (.cab) files of form-specific application configuration data.

1 Once the release scripts are installed, each Batch Class file must be imported into Kofax from the **Kofax Administration Module**. Run this program as described above.

2 From the Administration module's **File** menu, choose **Import**. The **Open** dialog box appears.

3 Navigate to the directory containing your .CAB files. (When batch classes are exported, they are exported as .CAB files.) Select the desired .CAB file, then click **Open**. The **Import/Export** window appears, and the .CAB file is unpacked and prepared for import. The **Unpacking** area of the dialog box displays the results of this process. When unpacking finishes, the system reports: **Unpacking done. Complete.**

4 Click **OK**. The **Import** dialog box appears. Select the batch classes you want to import from the list of **Available Batch Classes**. The list contains all the batch classes that were exported into the .CAB file you unpacked. Click the **Add** button to add them to the list of **Selected Batch Classes**.

5 Select the desired **Transfer Mode**. You can choose one of the following:

- **a** Do not import duplicates – Select this option if you do not want to overwrite duplicate batch class settings.
- **b** Save duplicates to new name – Select this option if you want to save duplicate batch class settings to a new name.
- **c** Replace duplicates with items imported – Select this option if you want to overwrite duplicate batch class settings with the ones you are importing.

6 Click **Import**. The **Import/Export** window appears. View the import results. Once the batch class is imported, you must publish it before you can use it. In addition, you may need to recompile any custom scripts associated with the batch class.

Publish Batch Classes

Once imported the *Batch Classes* must be published. Run this also from the **Kofax Administration Module**.

1 From the **File Menu** choose **Publish**. Select one or more batch classes to publish, or click **Select All** to select all batch classes in the list.

2 If desired, validate your batch classes before you attempt to publish them.

- **a** Click **Validate**. The validation process runs stringent checks on your batch class selections. The **Results** dialog box display the results of the validation process.
- **b** If errors are found, click **Close**, then fix the problems. If warnings appear, click **Close**, then check the problems. If no problems are found, continue with step 3.

3 Publish your batch classes.

- **a** Click **Publish**. The process runs stringent checks on your batch class selections. The **Results** dialog box display the results of the publishing process.
- **b** If errors are found, click **Close**, then fix the problems. If warnings appear, click **Close**, then check the problems. If no problems are found, continue with step 4.

4 Repeat steps 1–3 for each batch class to be published.

5 Click **Close** to close the dialog box.