

FileNet Capture 5.0 Documentation

This document describes the FileNet Capture Documentation for release 5.0. The FileNet Capture CD provides documentation for both the Capture Professional and Capture Desktop applications.

The FileNet Capture Toolkit CD provides documentation that describes how to customize the Capture Professional and Capture Desktop applications.

Release Notes

Release Notes are available through the worldwide web at:

<http://www.filenet.com>

Navigate to the Customer Service & Support area and enter your FileNET CSS web site user name and password to access the information. Additional support and reference documents are also posted to that location periodically.

Online Help Files

Online help files are available for both Capture Professional and Capture Desktop, and are installed automatically with the respective applications. Online help for the Capture Fax Entry option is also installed if the Fax Inbound option is selected during installation.

Online help for the Capture Programmer's Toolkit provides reference information for components, controls, and objects.

Manuals and Technical Notes

For information about FileNet Capture, consult the appropriate document from the list on the following pages. To open a manual or technical note from the CD, click on the underlined title.

Note Some of the documents described below apply to both Capture Professional and Capture Desktop, while some documents are specific to only one product. When you select a document, make sure that it applies to the product you are using.

FileNet Capture Installation Documentation

FileNet Capture Installation Guide

Folder: Cap_Docs

File: InstallationGuide.pdf



Desktop and
Professional

Applies to Capture Professional and Capture Desktop.

Provides a list of system and hardware requirements and compatibility considerations for Capture workstations. Describes how to install Capture scanning and non-scanning workstations, and includes instructions for installing options such as Fax Entry, Doc Processing, and Full Text OCR. Describes how to configure the server to be compatible with Capture, and provides instructions for testing the installation.

Refer to this manual to do the following:

- Install Capture on a workstation
- Test a Capture installation

Note If you are upgrading from an earlier version of FileNet Capture to Capture 5.0, it is important that you read the [**Upgrading to Capture 5.0**](#) chapter before you perform the upgrade.

FileNet Capture Desktop Installation Quick Reference

Folder: Cap_Docs/CapDsktp

File: QuickDT.pdf



Desktop only

Applies to Capture Desktop.

Provides a summary of the steps you must complete to install Capture Desktop.

Note that this is a Quick Reference designed for the system administrator or technician who is already familiar with the details of a Capture Installation.

FileNet Capture Professional Installation Quick Reference

Folder: Cap_Docs/CapPro

File: QuickPro.pdf



Professional only

Applies to Capture Professional.

Provides a summary of the steps you must complete to install Capture Professional.

Note that this is a Quick Reference designed for the system administrator or technician who is already familiar with the details of a Capture Installation.

FileNet Capture Reference Documentation

FileNet Capture Professional Administrator's Guide

Folder: Cap_Docs/CapPro

File: CapAdmin.pdf



Professional only

Applies to Capture Professional.

Describes planning and configuration of the Capture system. Includes information on how to configure the individual Capture components to work together using settings collections, templates, and capture paths, and how to run Capture in a distributed processing environment.

Refer to this manual to do the following:

- Design your Capture environment
- Create settings collections by configuring Capture components, and create templates to group settings collections for a specific document class
- Automate your Capture environment by configuring and running capture paths
- Configure scanning features such as Blank Page Detection
- Automate advanced indexing features, such as putting values directly into an index field from a bar code or external index file
- Automatically separate pages into documents, batches and folders by configuring and running Event Activator
- Monitor Capture system activity using several features that provide reports, statistics or totals

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- Understand security in the Capture environment
 - Manage the Capture Network environment. For example, manage access to repositories and servers using Capture Manager, configure polling for a workstation, or customize the user interface for a task-specific workstation.

Chapter 2, Planning a Capture System, outlines the planning procedure in a list of steps and links to the appropriate detailed chapters.

[FileNet Capture Application Developer's Guide](#)

Folder: ToolkitCD/Documentation/Manuals

File: DevGuide.pdf



Desktop and
Professional

Applies to Capture Professional and Capture Desktop.

Provides an overview of Panagon Capture functionality and architecture. This manual also presents a basic approach for users to write and customize their individual applications using Panagon Capture ActiveX Controls and Objects.

The guide is also available from the table of contents of the Toolkit help system.

FileNet Capture Online Help

[FileNet Capture Professional Online Help](#)

Folder: Cap_Docs/CapPro

File: Capture.chm



Professional only

Help system is also provided on the workstation after Capture is installed.

Applies to Capture Professional.

This help file, which is automatically installed on every Capture Professional workstation, provides information for the Capture Professional user. The ad hoc procedures help you use Capture to scan, assemble, verify, index and commit documents manually. The automated function procedures describe how to configure and run Capture in an automated environment.

Access this online help either through the Help command on the application menu, or through the Help button on a dialog box. Context-sensitive help is provided for most dialog boxes.

[FileNet Capture Desktop Online Help](#)

Folder: Cap_Docs/CapDsktp

File: Capdesk.chm



Desktop only

Help system is also provided on the workstation after Capture is installed.

Applies to Capture Desktop.

This help file, which is automatically installed on every Capture Desktop workstation, provides information for the Capture Desktop user.

Access this online help either through the Help command on the application menu, or through the Help button on a dialog box. Context-sensitive help is provided for most dialog boxes.

FileNet Capture Programmer's Toolkit Online Help



Desktop and
Professional

Applies to Capture Professional and Capture Desktop.

This help system provides reference information on the FileNet Capture components and controls. It includes a brief description of each control's basic functionality, along with a listing of its associated properties, methods, and events.

Access this online help on the FileNet Capture Toolkit CD under the Documentation directory.

FileNet Capture Technical Notes

Some of the FileNet Capture Technical Notes listed below are designed primarily for Capture Professional users. The basic techniques and principles described therein may also apply to Capture Desktop. However, specific usage examples for Capture Desktop are not included unless the Technical Note is specifically designed for Capture Desktop.

Capture Professional Getting Started Guide



Professional only

Folder: Cap_Docs/CapPro
File: TN_Start.pdf

Provides a brief tutorial for the first-time Capture Professional user. Introduces important concepts and terminology, and demonstrates how to scan and process an image.

Capture Desktop Getting Started Guide



Desktop only

Folder: Cap_Docs/CapDsktp
File: StartDT.pdf

Provides a brief tutorial for the first-time Capture Desktop user. Introduces important concepts and terminology, and demonstrates how to scan and process an image.

Bar Code Usage and Tips



Desktop and
Professional

Folder: Cap_Docs/TechNotes
File: TN_Bar.pdf

Provides guidelines for using bar codes and optimizing bar codes read within the context of the FileNet Capture product.

Automatically Assigning Inbound Faxes to Document Classes



Professional only

Folder: Cap_Docs/TechNotes
File: TN_AFax.pdf

Describes how to configure FileNet Capture to automatically assign an inbound fax to one of several document classes based on the fax channel ID. Includes targeted background information and a set of procedures with examples.

Automatic Indexing from Kodak Image Address



Professional only

Folder: Cap_Docs/TechNotes
File: TN_Kodak.pdf

Describes how to configure FileNet Capture to automatically put a value from the Kodak image address into an index entry field. Includes targeted background information and a set of procedures with examples.

Please note that the procedures included in this Technical Note were created with an earlier release of FileNet Capture. Some of the screens used for illustration have changed, but the fundamental procedure is the same.

Automatic Indexing of Create Time



Professional only

Folder: Cap_Docs/TechNotes
File: TN_Time.pdf

Describes how to configure FileNet Capture to automatically put the create time value into an index entry field. Includes targeted background information and a set of procedures with examples.

Please note that the procedures included in this Technical Note were created with an earlier release of FileNet Capture. Some of the screens used for illustration have changed, but the fundamental procedure is the same.

Autoindexing Fax Entry Journals



Professional only

Folder: Cap_Docs/TechNotes
File: TN_FJrnl.pdf

Describes how to configure Fax Entry to automatically process journal logs after either a specified number of events, or a specified period of time.