Technical Notes

Capture Desktop Getting Started Guide

August 2005

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Capture Desktop Getting Started Guide

This guide provides a brief overview of Capture Desktop to demonstrate how you scan and import documents. For more information, refer to the online help provided with the software.

Starting Capture Desktop

From the Windows desktop, select the FileNet Capture Desktop program from the Start/Programs menu, then select Capture Desktop.

You may have to enter a user name and password in the FileNet Logon dialog box.

If you have only one library configured and that library is not available, Capture Desktop will not start.

If this happens with an Image Services or a Content Services library, go to the Windows Start/Programs menu. Select FileNet IDM and then select Configure to add your library. For more information, refer to the *IDM Desktop Administrator's Help* and *IDM Desktop Help*.

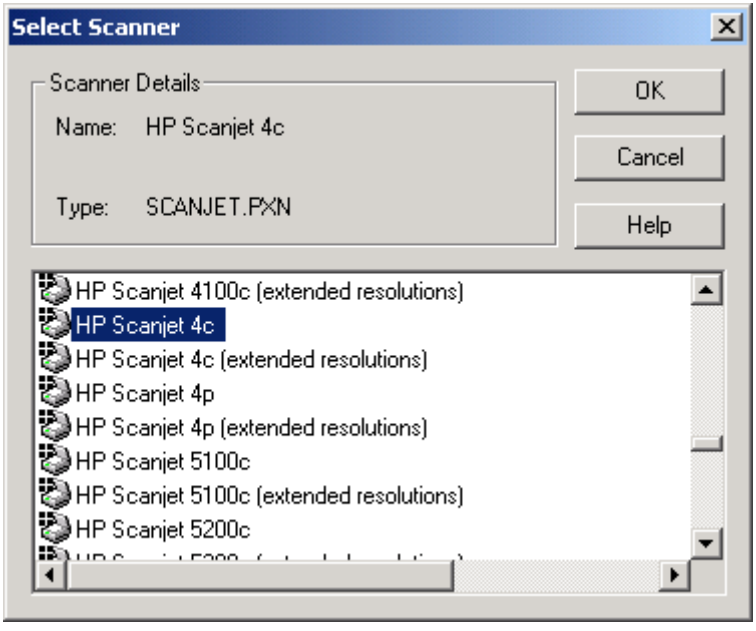
When Capture Desktop loads, you will see the main window in the Advanced Mode, as shown in the next illustration. You can change to Scan Wizard mode using the Options menu.

FileNet Capture Desktop
File
Options
Help
FileNet
Capture Desktop
Library
dscpf3
Batch Name
Scan
Processing
Blank Page
Assembly
OCR
Zonal OCR
Properties
Status
Document Source
Scan
File Import
Path
File Specification
Import
Advanced Settings...
Help

Selecting a Scanner

This section assumes that you will be using Capture Desktop to scan documents. If you are using File Import only, go to "Importing Images" on page 15.

1 To specify the type of scanner you are using, select the Options menu from the toolbar and choose **Select Scanner**.



2 Select the type of scanner you are using from the list displayed. If you are using a Kofax board and you created a source when you configured the Kofax Source Manager (KSM), select the source name you specified (such as "Kofax Engine 1").

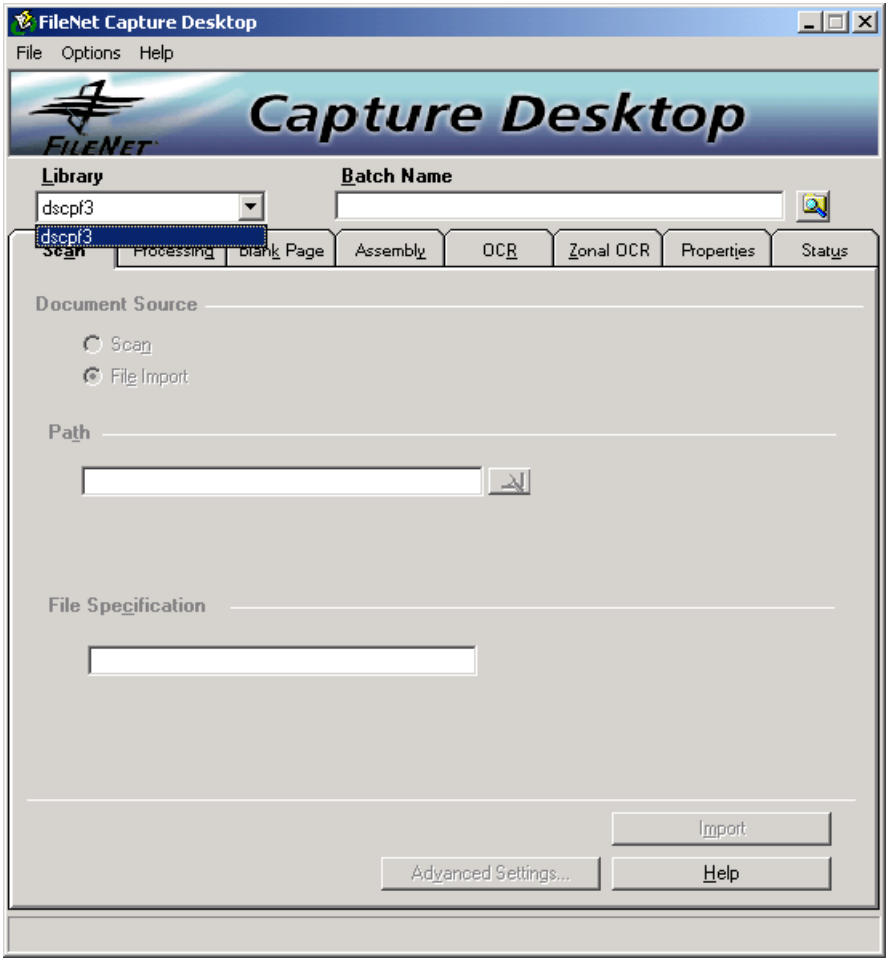
3 Click **OK** to return to the main screen. After you have tested the basic scanner operation, you can return to the scanner configuration screen to set the options available for your specific scanner.

Creating a New Folder and Batch

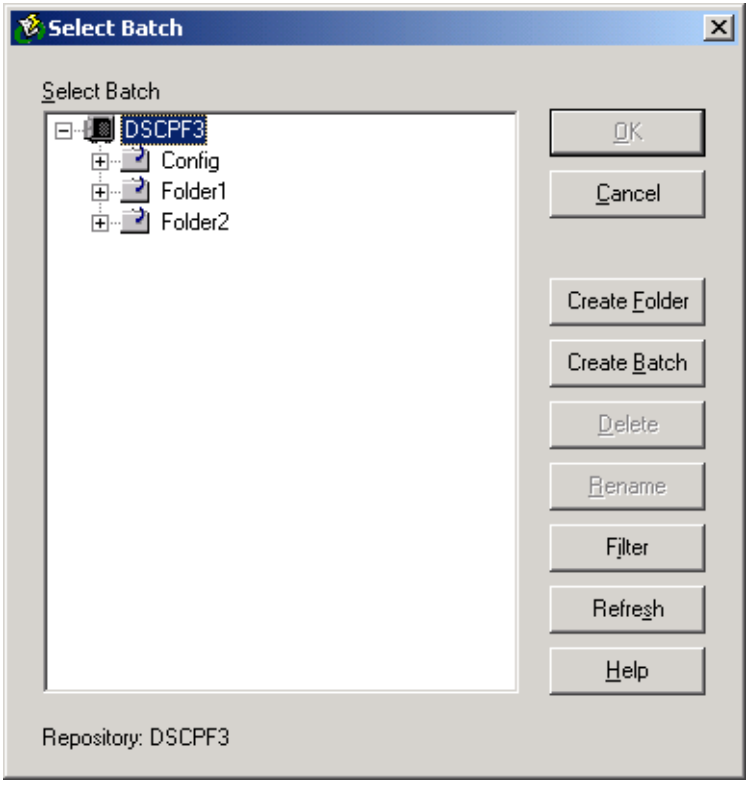
Note If you have not yet installed and configured your scanner, refer to the *Capture Installation Guide* before you proceed. You must install and configure your scanner before you can continue.

Before you scan or import images, you must create a batch to receive the images. Use the following procedure to create a new test batch in your selected library.

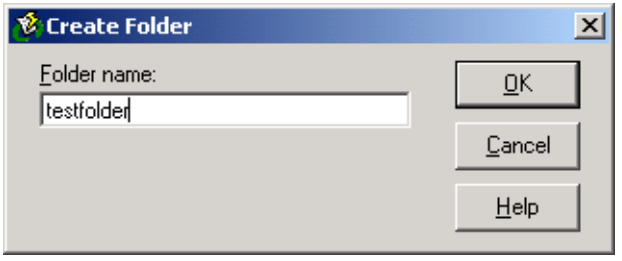
1 If you have more than one library available, select the library you want to use from the list of available libraries, as shown in the Capture Desktop window following. (Click the arrow to the right or the Library field to display the available libraries.)


FileNet Capture Desktop
File Options Help
FILENET
Capture Desktop
Library
Batch Name
dscpf3
dscpf3
Scan
Processing
Blank Page
Assembly
OCR
Zonal OCR
Properties
Status
Document Source
Scan
File Import
Path
File Specification
Import
Advanced Settings...
Help

2 Click the browse icon next to the Batch Name field to display the Select Batch dialog box.



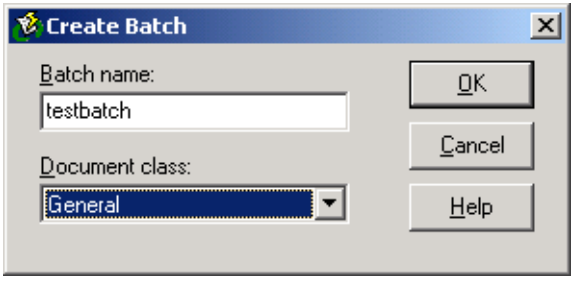
3 Click **Create Folder**. Enter your folder name and click the **OK** button.



4 If you do not see the new folder in the Select Batch dialog box, use the **Refresh** button to update the display.

5 Highlight your new folder name, and then click the **Create Batch** button. The Create Batch dialog box appears.

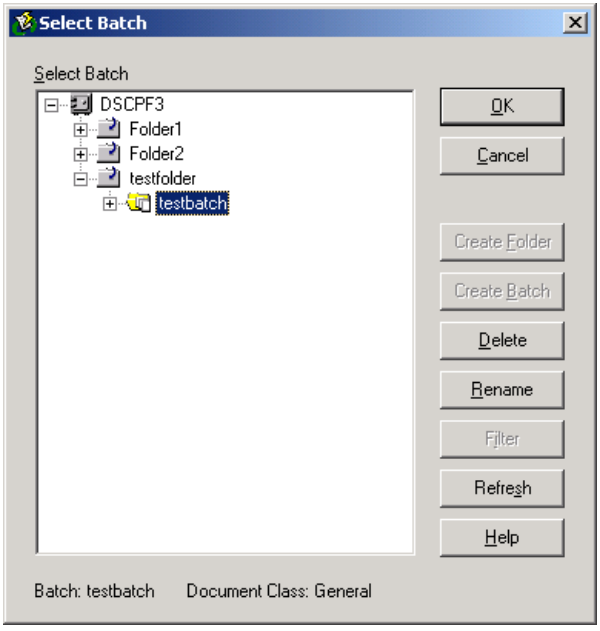
a Enter the batch name. In the Document class field, use the drop-down menu to select your document class.



b Click **OK**.

c After you create the batch, you may have to expand the folder shown in the Select Batch dialog box to select your new batch.

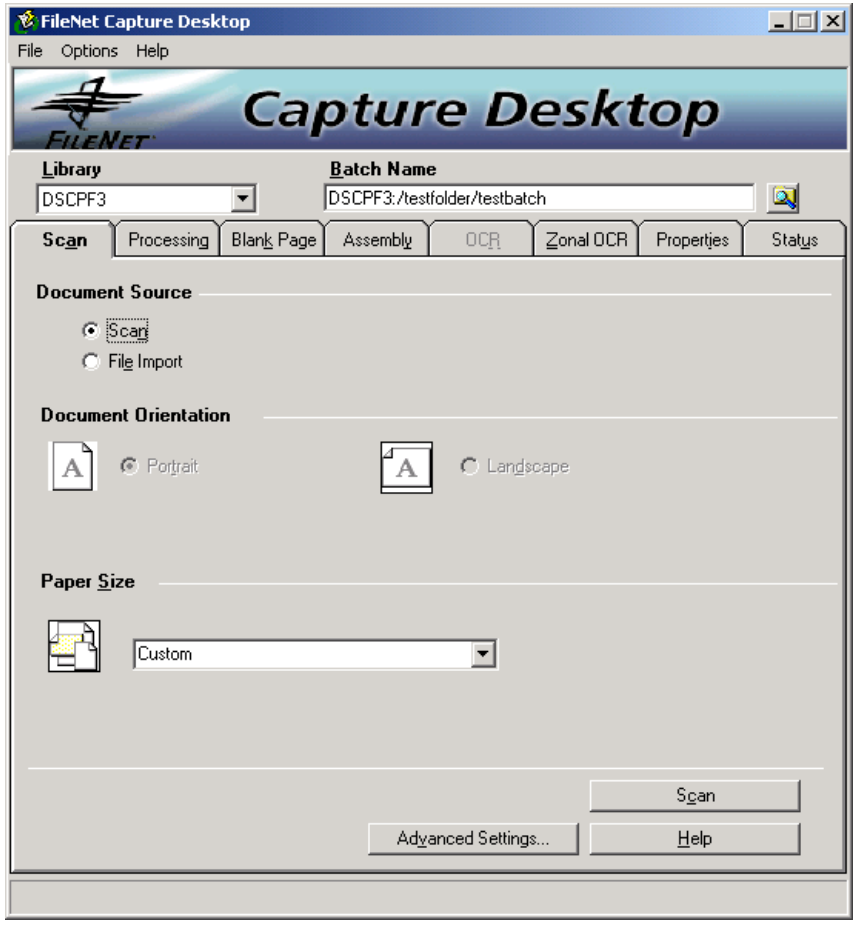
6 If necessary, select the batch in the Select Batch dialog box and click **OK**.



Scanning Images

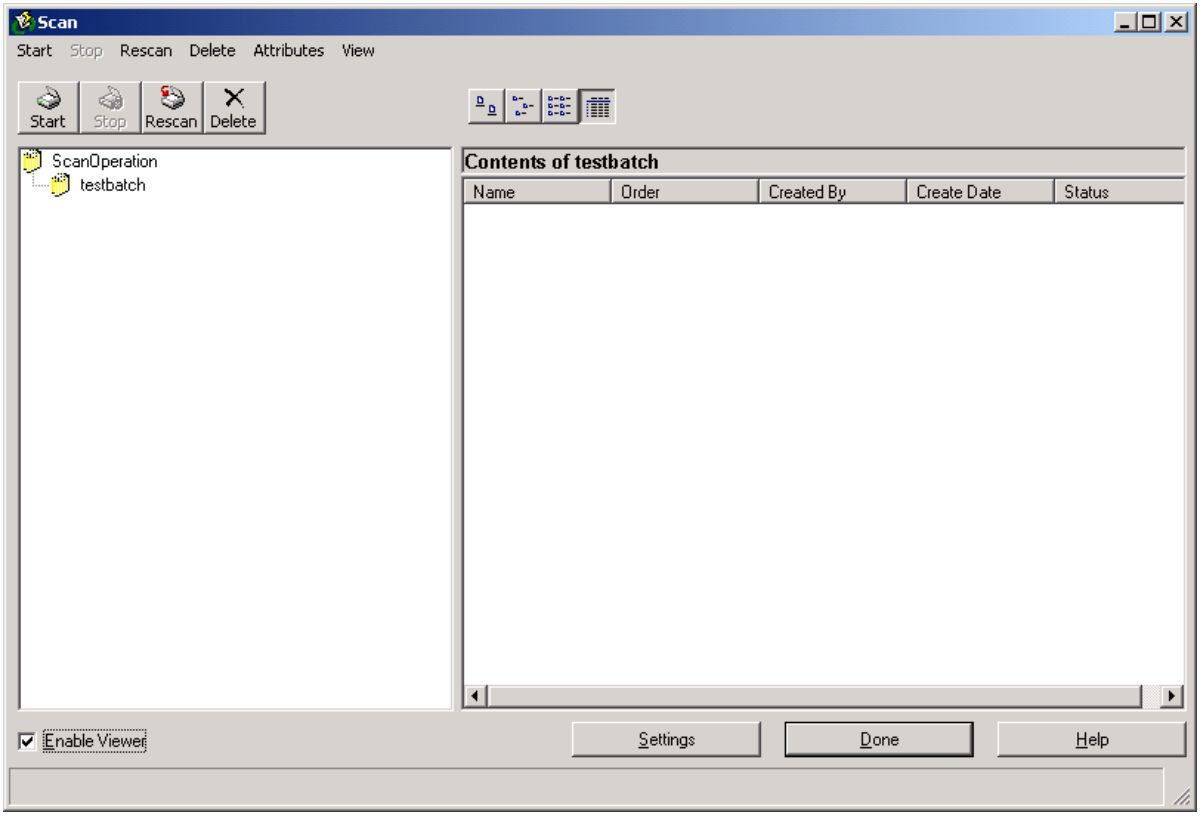
1 From the Capture Desktop window, verify that the Library field contains the correct library and that the Batch Name field contains your batch.

2 Select the **Scan** radio button.



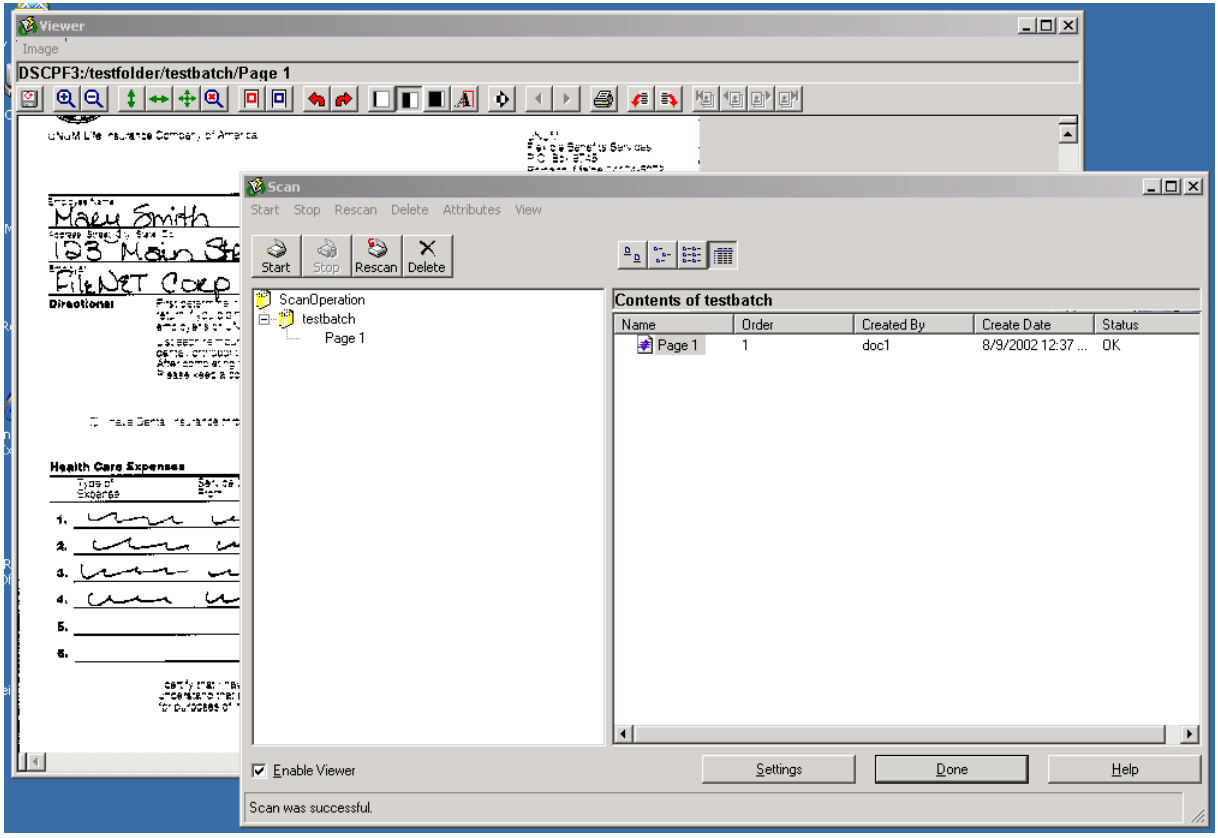
3 Place a page in the feeder or on the flatbed of the scanner, and then click the **Scan** button on the lower-right corner of the window.

4 Capture Desktop displays the Scan window. To display your images as they are scanned, check the Enable Viewer check box in the lower-left corner of the Scan window.



5 Click the **Start** button at the top of the Scan window. The scanner should initialize and scan the test sheet.

6 If the page was successfully scanned, the image appears under the selected batch as a page icon in the Scan window. If you checked the Enable Viewer check box, the scanned page will display in a separate viewer window.

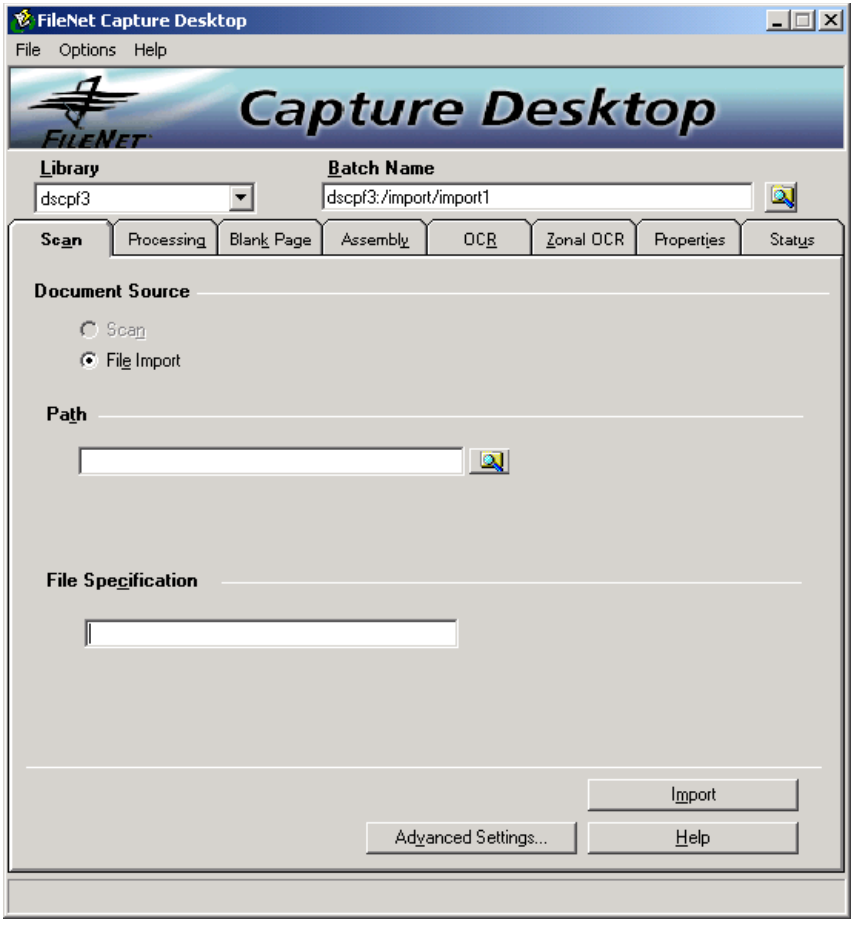


7 On the Scan window, click the **Done** button at the bottom when you are finished. If you were not able to scan, verify each of the installation procedures.

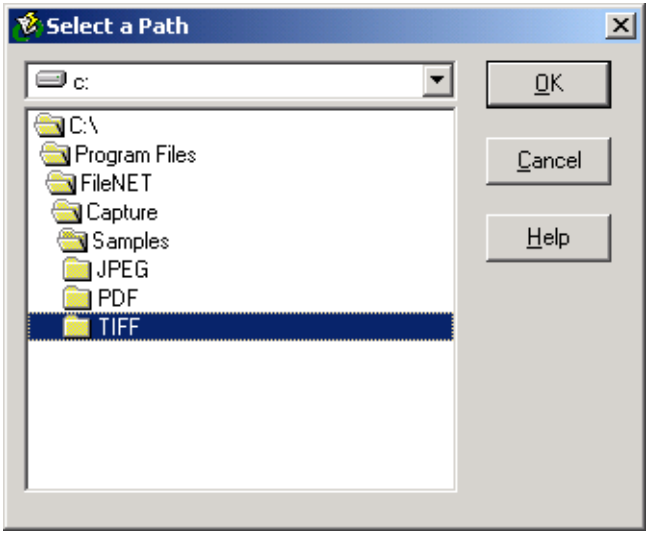
Importing Images

1 From the Capture Desktop window, verify that the Library field contains the correct library and that the Batch Name field contains your new batch.

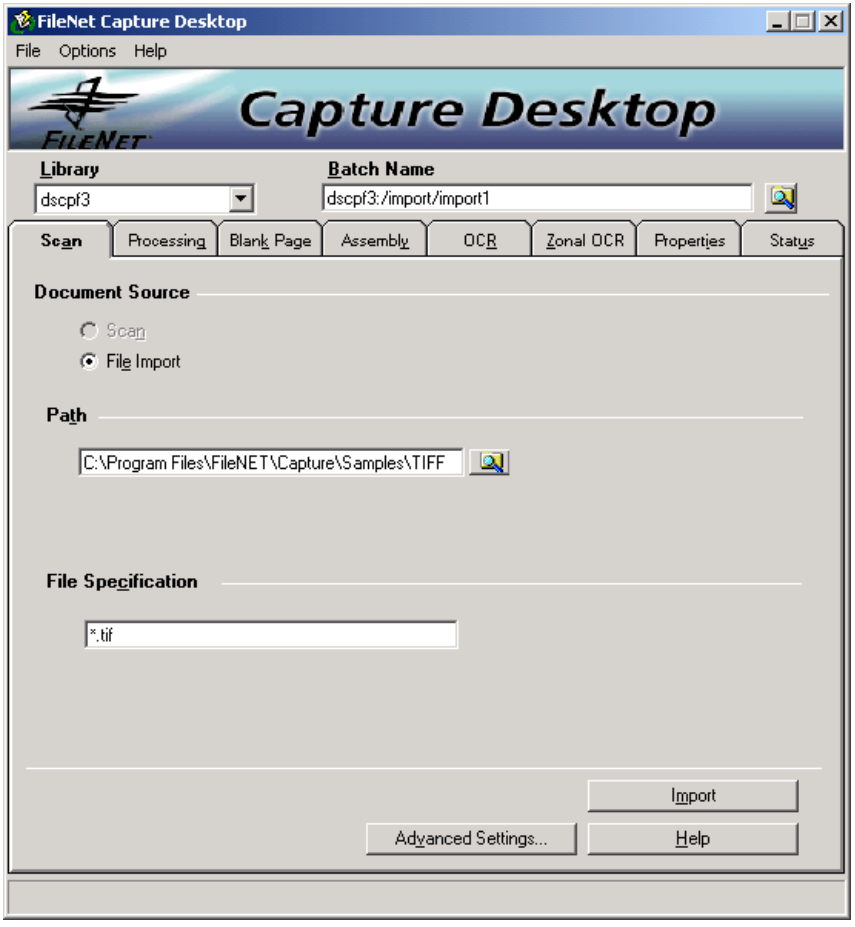
2 In the Document Source section, select the **File Import** radio button.



3 Click the browse icon next to the Path field. In the Select a Path dialog box, select the folder and path containing the files you want to import. Click **OK** to return to the Capture Desktop window.



4 To import all the files in the folder, enter a wild card character and file extension (*.tif or *.jpg) in the File Specification field on the Capture Desktop window,.



5 Click the **Import** button on the lower-right corner of the window. The status bar at the bottom of the window will notify you that the file import was successful or unsuccessful.

6 To verify that your batch contains your imported images, click the icon next to the Batch Name field. Click **OK** when finished.

7 To view the imported images, check the **Enable Viewer** check box on the bottom of the Processing tab (if you have Document Processing installed), the Assembly tab with the Manual radio button activated, or the Properties tab.

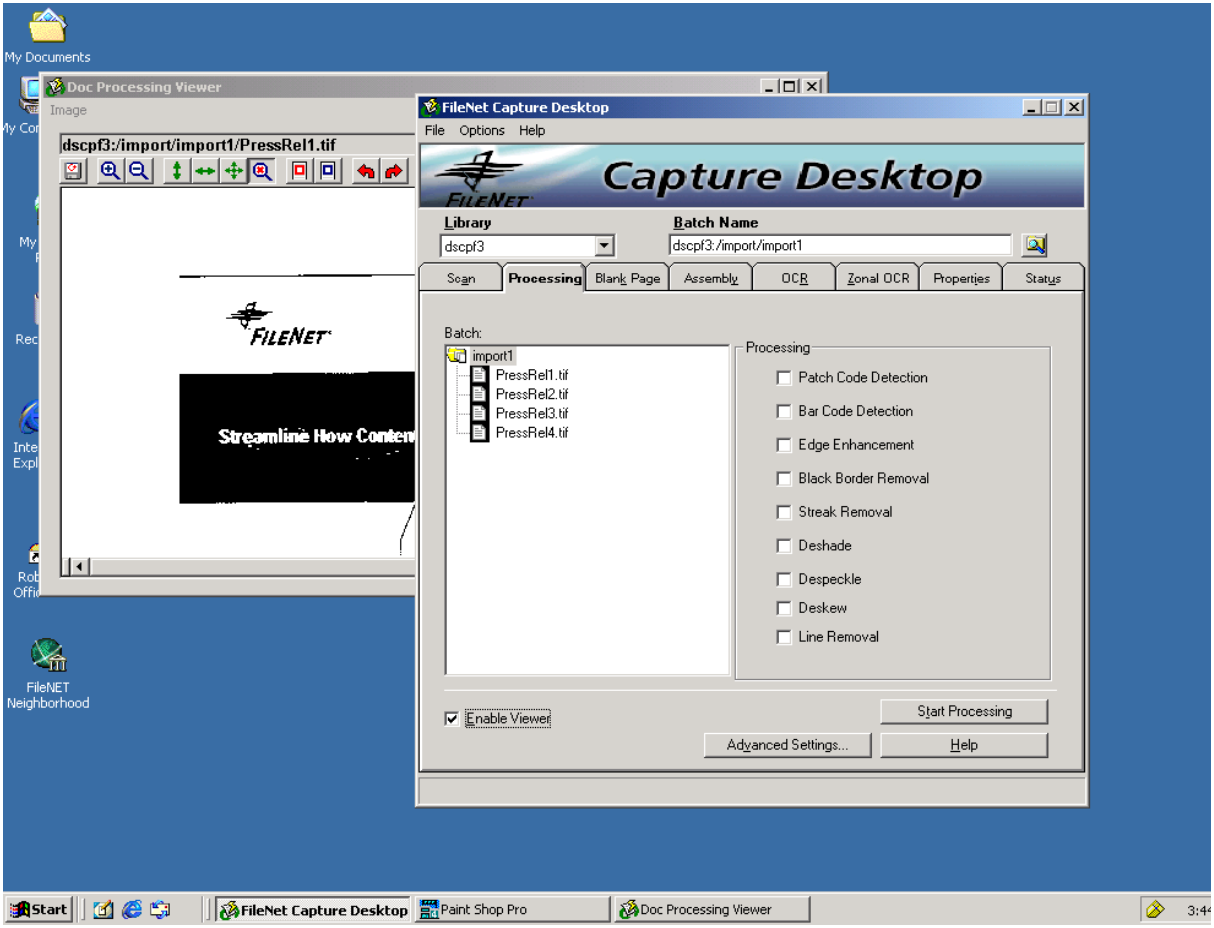
Document Processing

1 If you have the Document Processing package, select the Processing tab on the Capture Desktop window. Verify that the Enable Viewer check box is checked. (If you don't have Document Processing, continue with "Adding Properties and Adding a Batch to the Library" on page 22.)

2 Select one of the .tif files, and adjust the viewer and Capture Desktop windows as needed to display the Capture window and viewer.

3 Select an image that needs to be cleaned up and contains speckles, if possible.

4 Click the Despeckle check box on the Processing tab.



5 Use the viewer toolbar buttons to customize the display, if you wish.

6 If you want to customize the settings for the despeckle function, do the following:

a Click the **Advanced** button on the Processing tab.

b Click the **Enhancement** tab.

c Select **None** from the Rotation drop-down menu, and make any other adjustments you wish.

d Verify that the **Enable** check box in the Despeckle section is checked. Click **OK**.

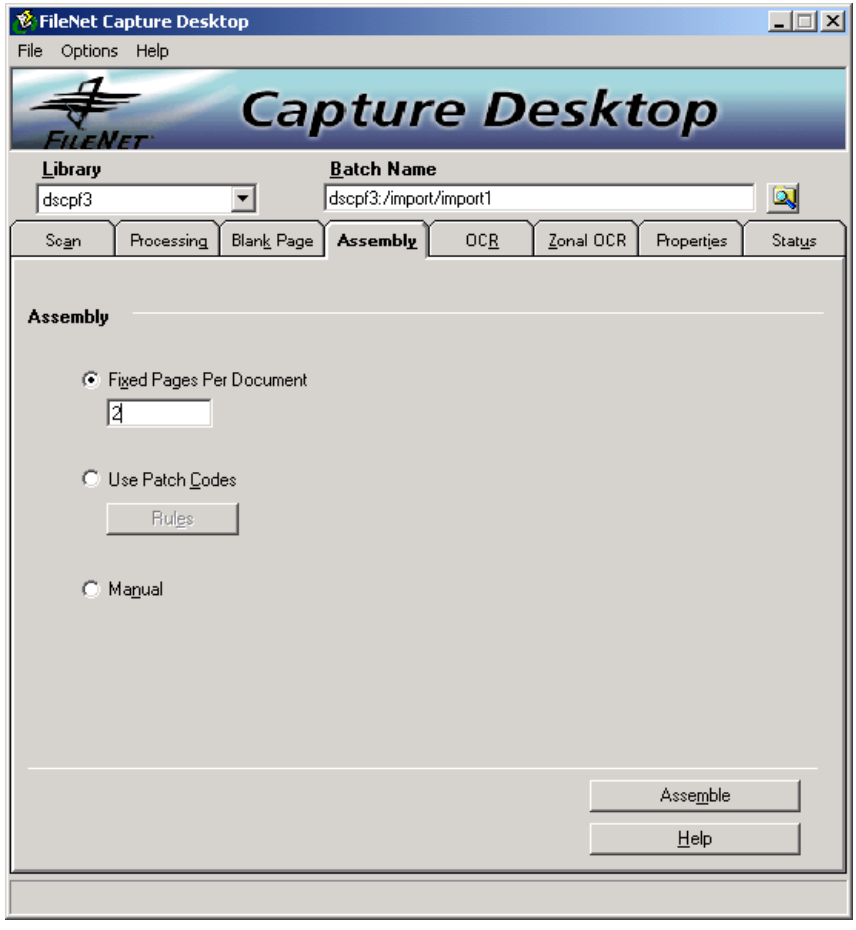
7 Click the **Start Processing** button. Note that the speckles have been removed from the displayed image.

Assembling Documents

1 Select the **Assembly** tab on the Capture Desktop window.

2 Select the **Fixed Pages Per Document** radio button and enter **2**. This will restrict your documents to two pages.

3 Click the Assemble button. Your Assembly status appears in the Status Bar.


FileNet Capture Desktop
File Options Help
FILENET
Capture Desktop
Library
dscpf3
Batch Name
dscpf3:/import/import1
Scan
Processing
Blank Page
Assembly
OCR
Zonal OCR
Properties
Status
Assembly
Fixed Pages Per Document
2
Use Patch Codes
Rules
Manual
Assemble
Help

Adding Properties and Adding a Batch to the Library

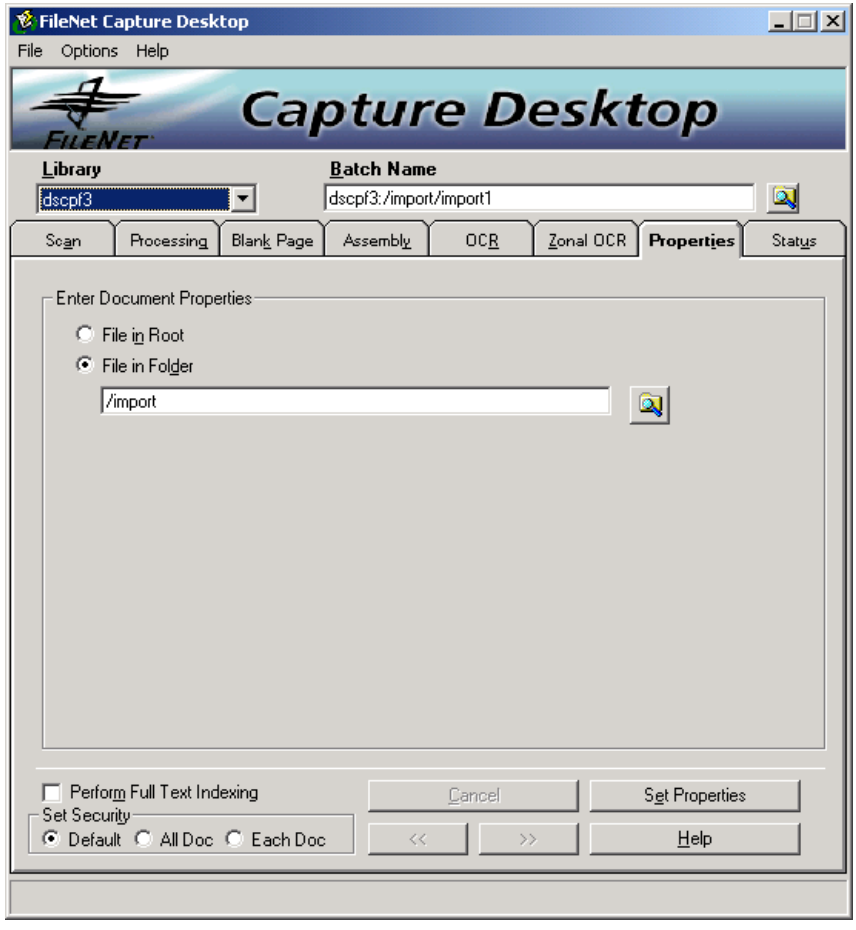
1 Select the Properties tab in the Capture Desktop window.

a To add the document to the root folder on the library, select the **File in Root** radio button.

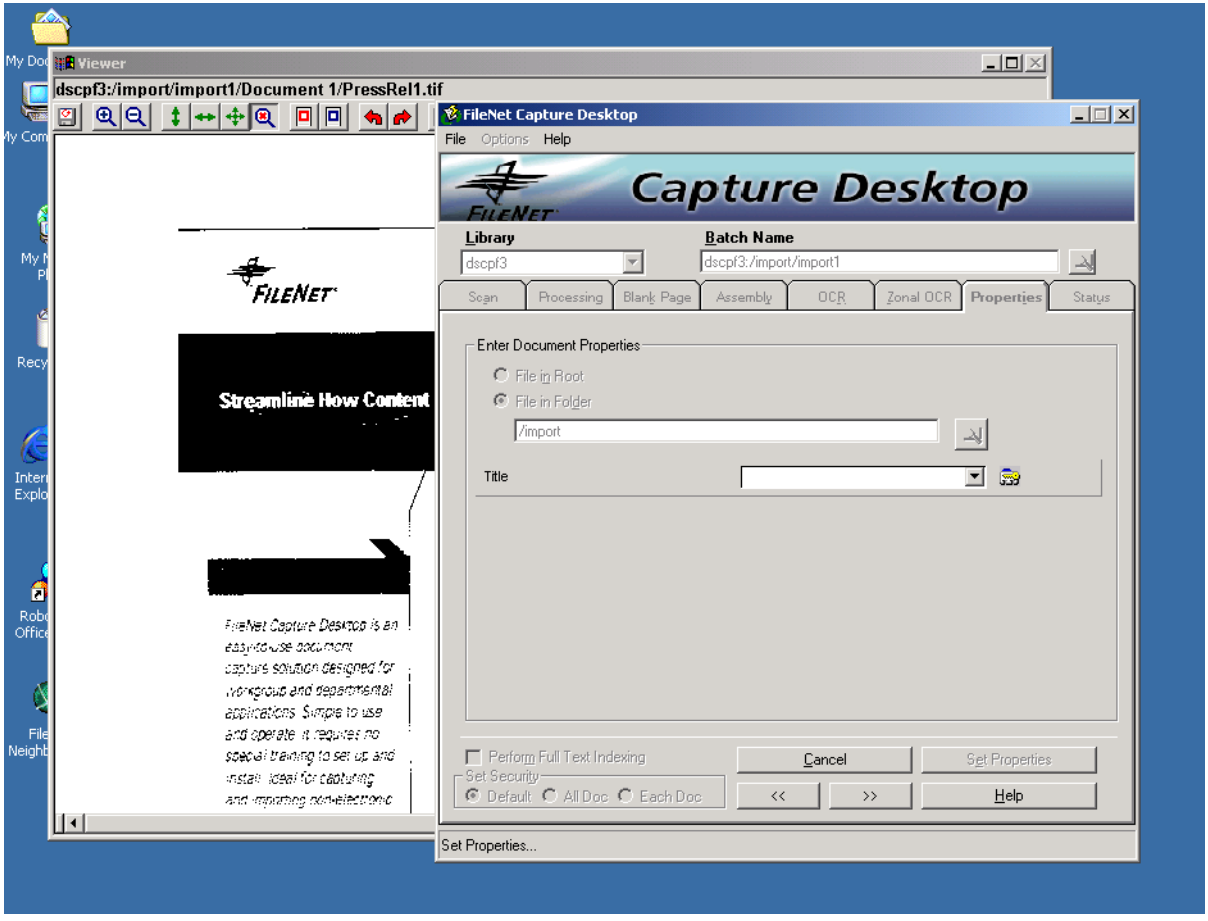
b To add the document to a specific folder, select the **File in Folder** radio button and specify the folder in the box below.

2 To perform full text indexing on the document, select the **Perform Full Text Indexing** check box. (Not recommended for this example, as it may take several minutes.) Refer to the online help for Capture Desktop for more information on this option.

3 Select a security setting for the document using the **Set Security** radio buttons. Refer to the online help for Capture Desktop for more information on this option.

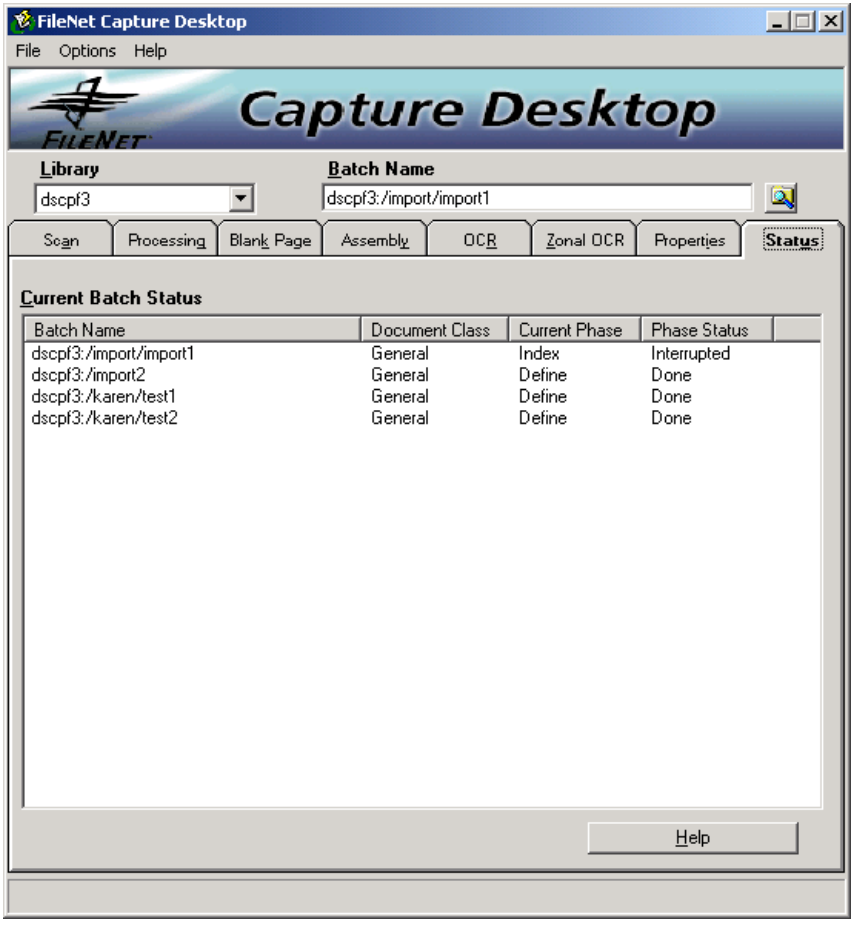


4 Click the **Set Properties** button. The properties fields for the first document appear while the document is displayed in the viewer.



5 Fill in the properties fields for the first document. Press **Enter** after entering each field. After you make the final entry and press **Enter**, your batch is committed to the server and is no longer in Capture Desktop.

6 Select the **Status** tab. If your batch does not appear in the list, that means it has been successfully added (committed) to the library and no longer is in the Capture Desktop system.



Using the Help System

There are three ways to search for information, a specific topic or a word in the online help:

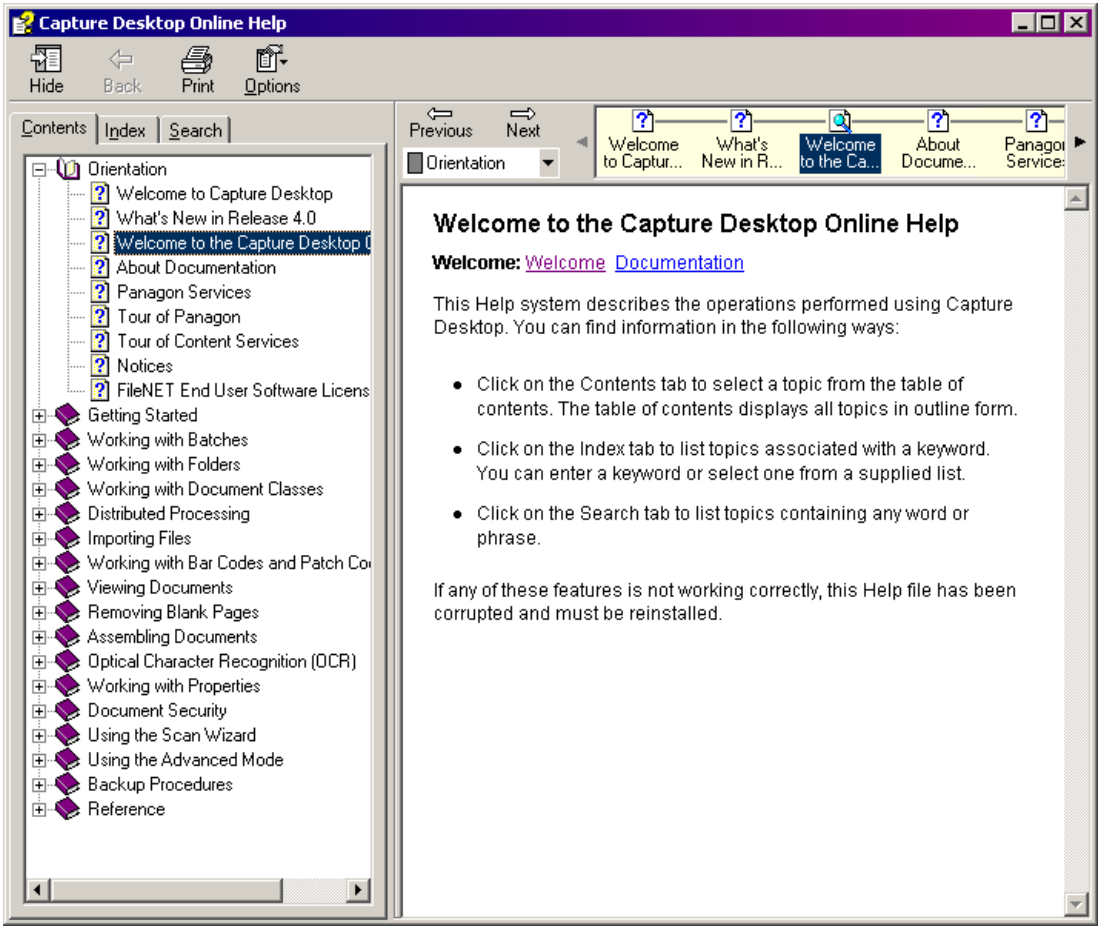
- The Contents tab is organized much like the Table of Contents in a printed book. Related topics and procedures are grouped together.
- The Index tab presents a list of specific words and topics, listed alphabetically.
- The Search tab locates all occurrences of a specific word or group of words.

The following steps present a brief sample of each method.

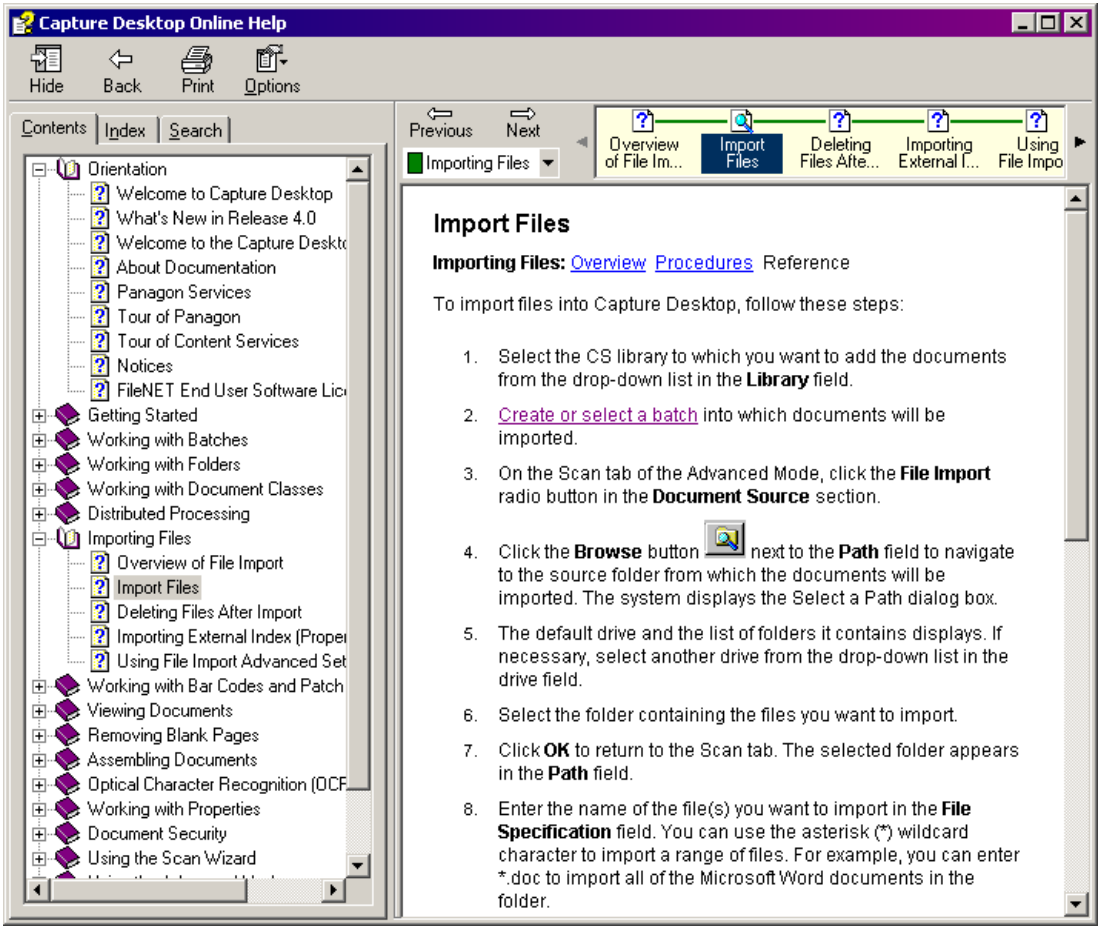
Note To display help for a specific window or dialog box, click the **Help** button or press the **F1** key.

Using the Contents Tab

1. Select the **Help** drop-down menu and choose **Help Topics**. (Refer to the previous Capture Desktop illustration.)
2. In the Help Topics window, select the **Contents** button to display the Table of Contents.



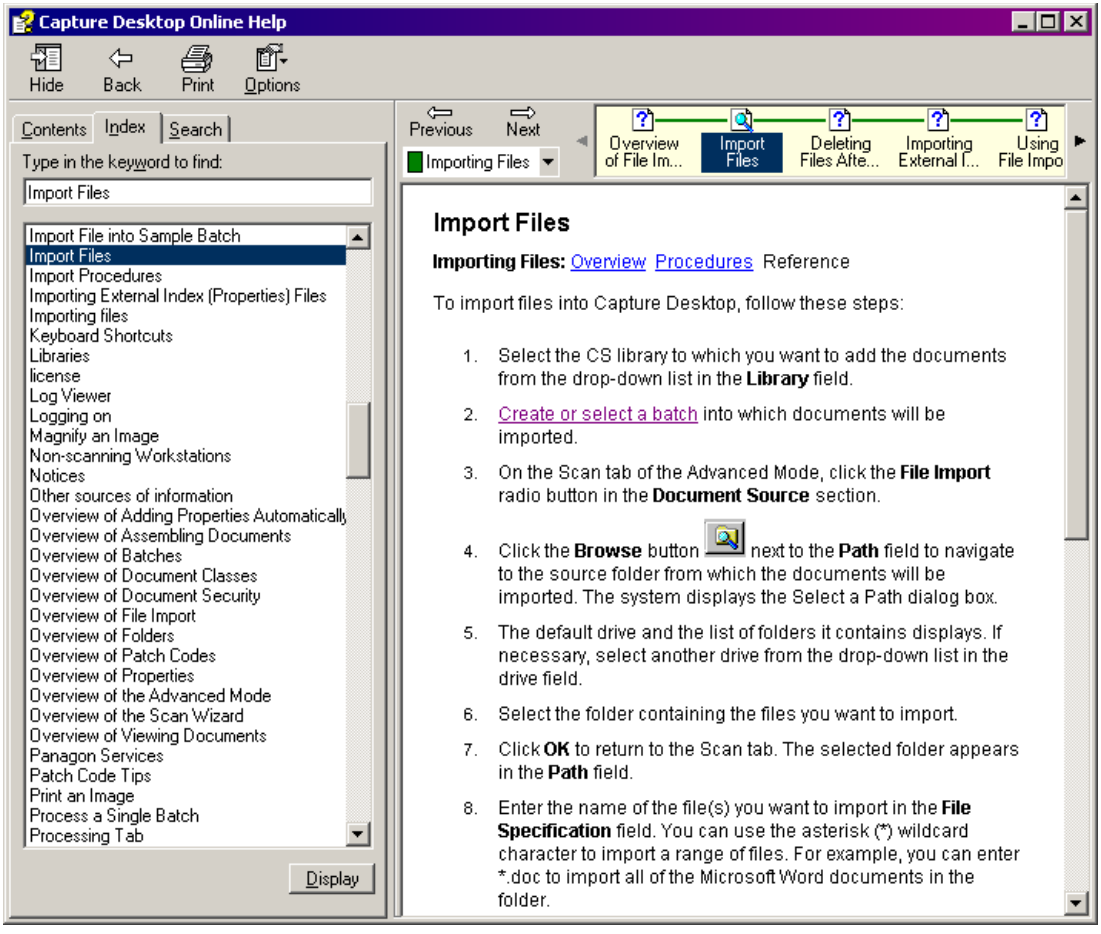
3 Double-click on the topic “Importing Files.” Choose “Import Files” under that topic.


Capture Desktop Online Help
Hide
Back
Print
Options
Contents
Index
Search
Orientation
Welcome to Capture Desktop
What's New in Release 4.0
Welcome to the Capture Deskto
About Documentation
Panagon Services
Tour of Panagon
Tour of Content Services
Notices
FileNET End User Software Lic
Getting Started
Working with Batches
Working with Folders
Working with Document Classes
Distributed Processing
Importing Files
Overview of File Import
Import Files
Deleting Files After Import
Importing External Index (Proper
Using File Import Advanced Set
Working with Bar Codes and Patch
Viewing Documents
Removing Blank Pages
Assembling Documents
Optical Character Recognition (OCF
Working with Properties
Document Security
Using the Scan Wizard
Previous
Next
Importing Files
Overview of File Im...
Import Files
Deleting Files Afte...
Importing External I...
Using File Impo
Import Files
Importing Files: Overview Procedures Reference
To import files into Capture Desktop, follow these steps:
1. Select the CS library to which you want to add the documents from the drop-down list in the Library field.
2. Create or select a batch into which documents will be imported.
3. On the Scan tab of the Advanced Mode, click the File Import radio button in the Document Source section.
4. Click the Browse button next to the Path field to navigate to the source folder from which the documents will be imported. The system displays the Select a Path dialog box.
5. The default drive and the list of folders it contains displays. If necessary, select another drive from the drop-down list in the drive field.
6. Select the folder containing the files you want to import.
7. Click OK to return to the Scan tab. The selected folder appears in the Path field.
8. Enter the name of the file(s) you want to import in the File Specification field. You can use the asterisk (*) wildcard character to import a range of files. For example, you can enter *.doc to import all of the Microsoft Word documents in the folder.

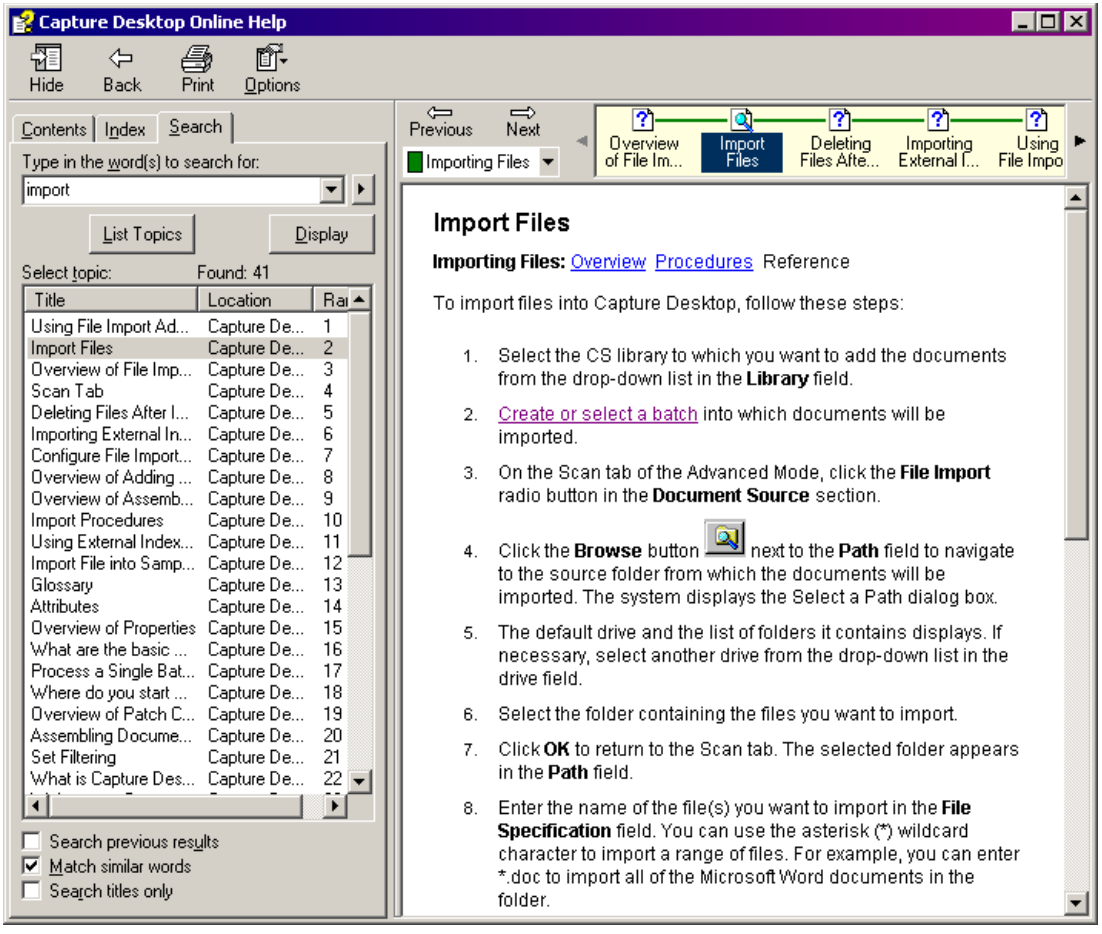
Using the Index Tab

1. Select the **Index** tab and enter “im” to jump to the import topics.

2. Select the **Import Files** topic from the list, then click the **Display** button to display it.



Using the Search Tab

1. Select the **Search** tab. Type “import” in the search field then click List Topics.

2. Select a topic from the list then click Display to display the topic.