

Technical Notes



Capture

Capture Professional Getting Started Guide

August 2005

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FileNet Corporation
3565 Harbor Boulevard
Costa Mesa, California 92626
800.FILENET (345.3638)
Outside the U.S., call:
1.714.327.3400
www.filenet.com

Capture Professional Getting Started Guide

This Technical Note provides basic instructions for users who are new to Capture Professional. This document provides an overview of the steps you need to follow to scan documents. For more information, refer to the online help files provided with the software.

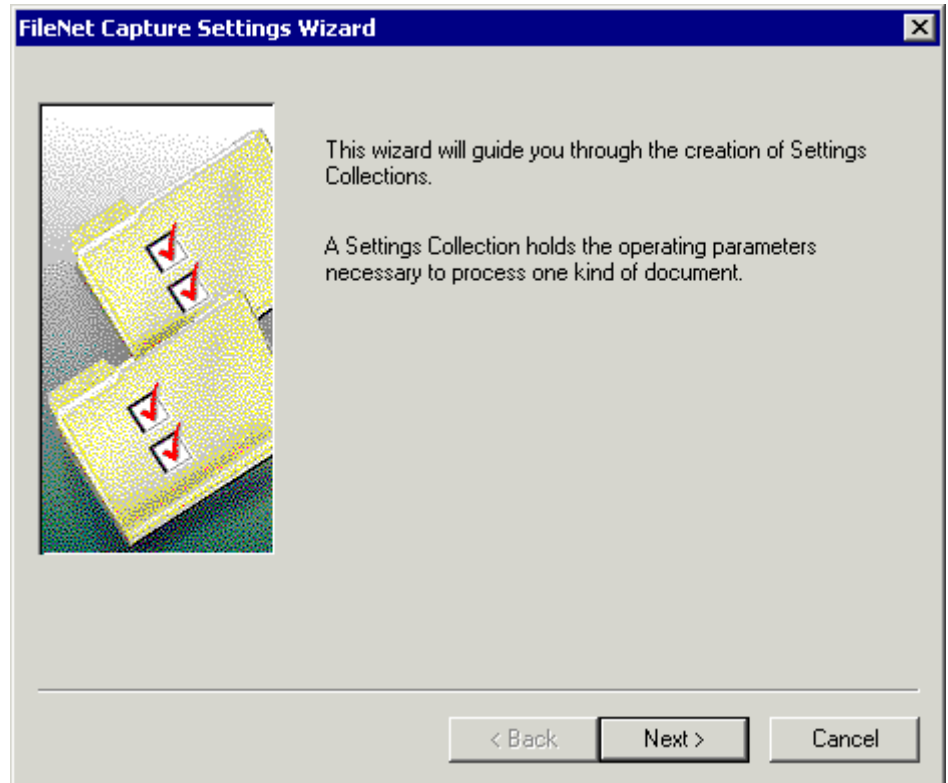
Note The examples in this Technical Note were created using Capture Professional release 4.1. If you are using a different release, your screens may differ slightly. However, the basic principles presented are the same.

Create a Settings Collection Using an Existing Document Class

Before you can capture new documents into a batch with Capture Professional, you must create settings collections to specify values for the many parameters available to you. (Settings collections are essentially configuration files that specify the settings used for scanning, assembly, indexing, and virtually any function performed by a Capture component.) Refer to the online help for information on settings collections.

Create a new settings collection, as follows:

- 1 Open the File menu and click the New command. Select Settings from the secondary menu to start the Settings wizard.

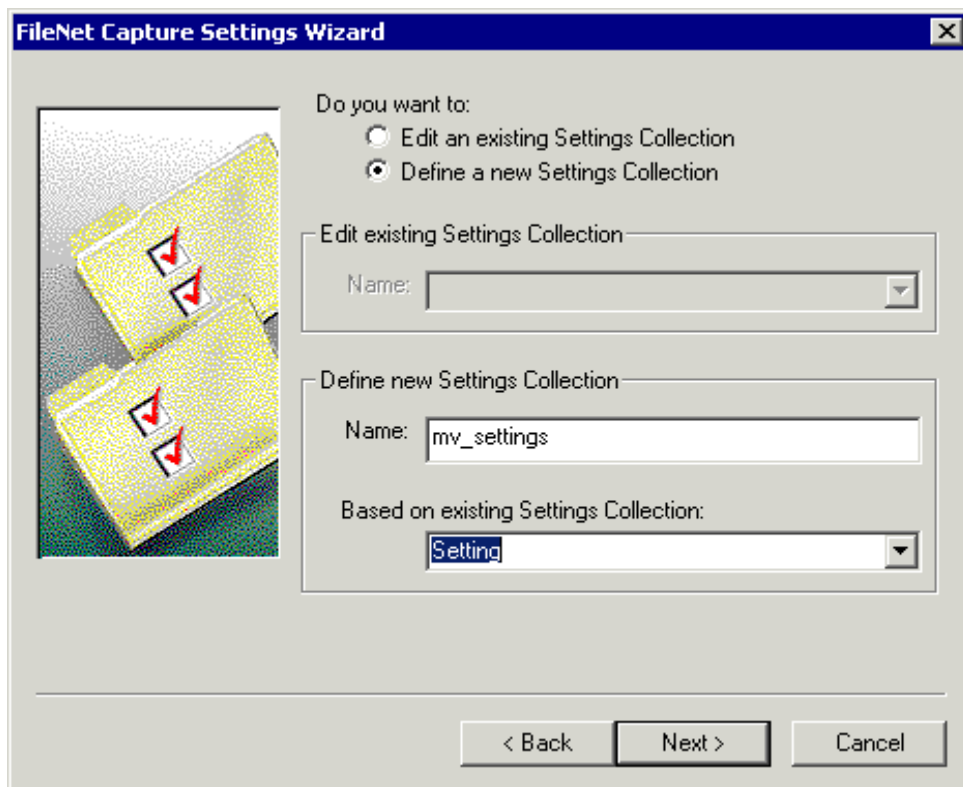


- 2 Click Next to advance to the next screen.

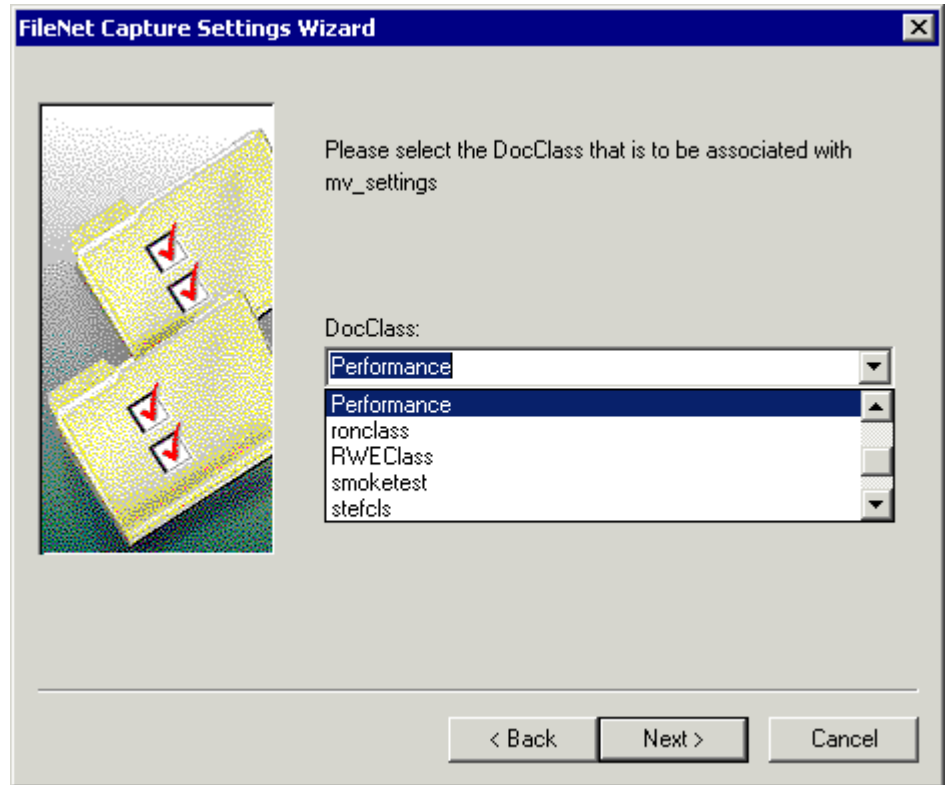
- 3 When prompted for a repository, be sure to enter the name of the Image Services, Content Engine or Content Services library, not the Local Repository.



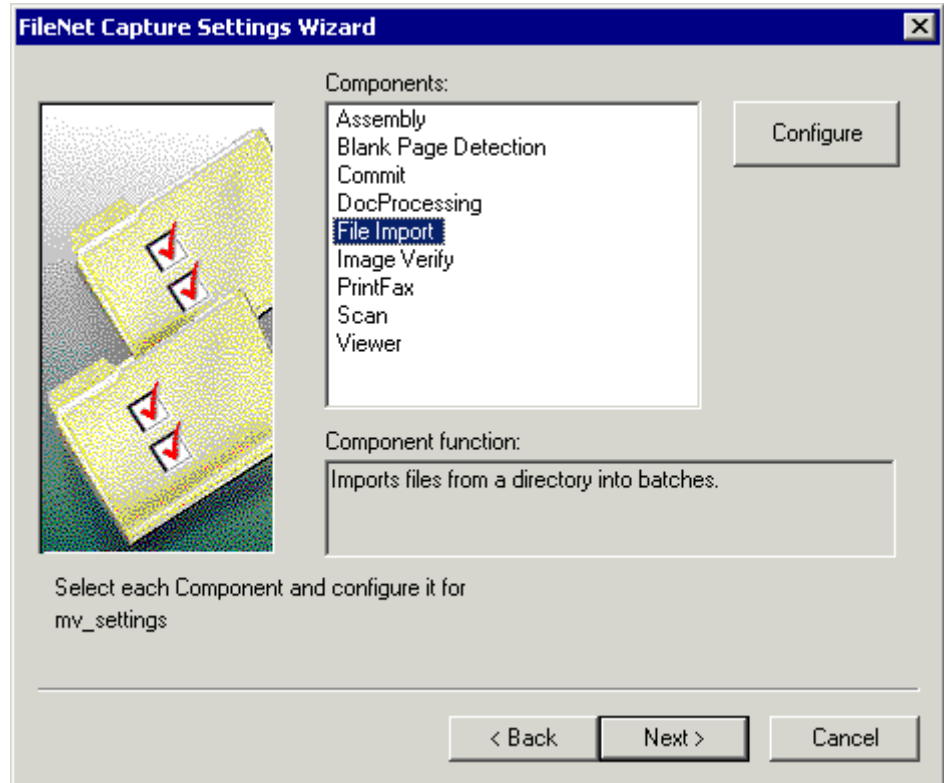
- 4 Enter a name for the settings collection in the name field.



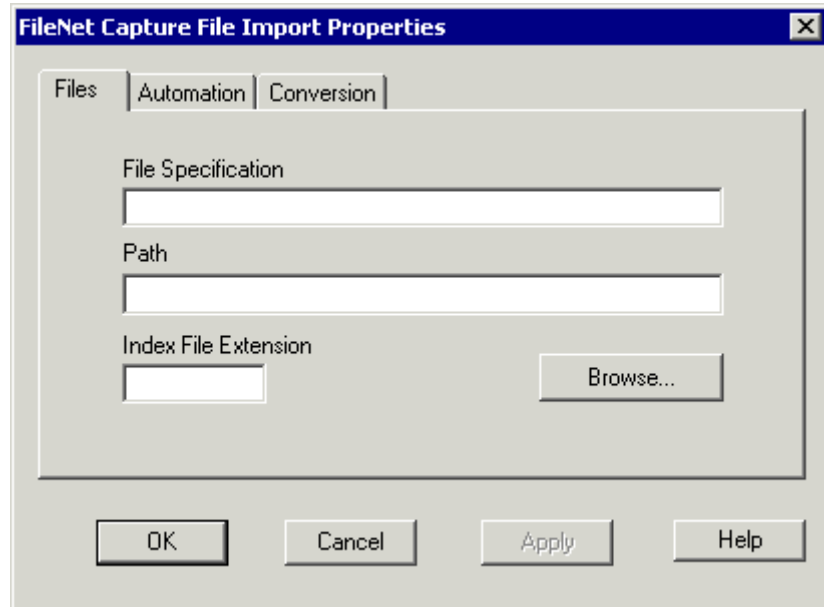
- 5 When prompted for a Doc Class, use one of the document classes present on the library (Content Engine, Content Services or Image Services repository). (Available document classes appear in the scroll box.)



- The next screen displays a list of installed components. Use this screen to select a component to configure within the settings collection. Select a component from the list then click **Configure** to specify settings for the component.



For example, select the File Import component and click the **Configure** button, to display the Capture File Import Property Page:



When you have completed configuration, click **OK** to return to the Settings Wizard.

- 7 Click **Next** to advance through the remaining dialogs and complete the process.

The settings collection appears in the Settings folder, under the Config folder on the library.

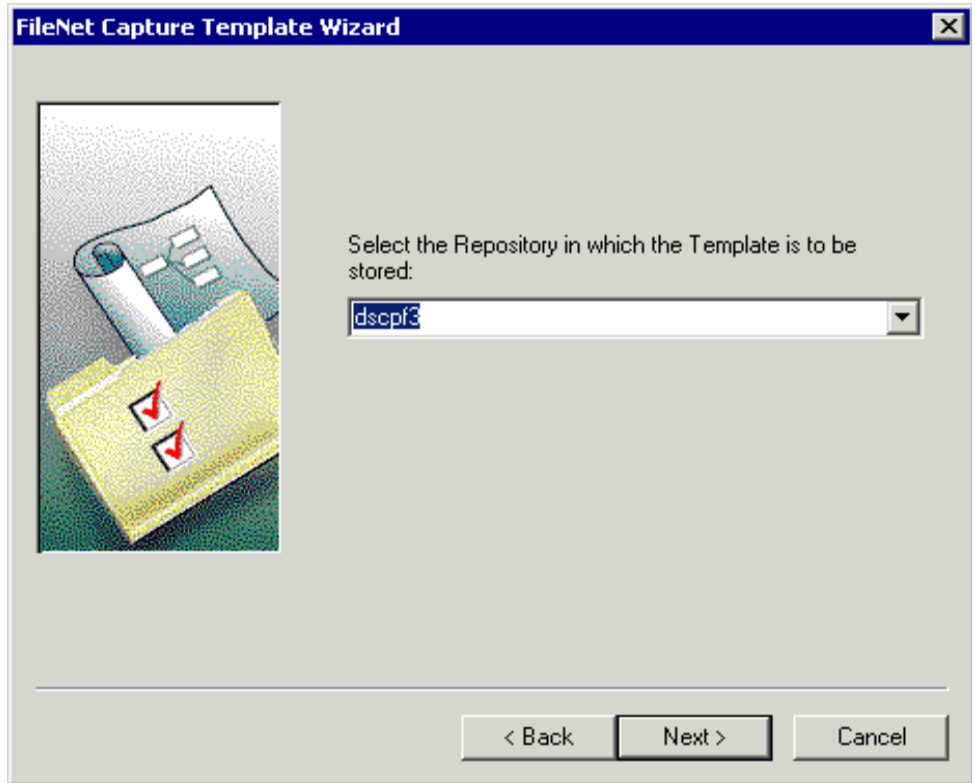
Use this settings collection as the Default Settings Collection for a new template, as described in [“Create a Template Based on the Settings Collection” on page 8](#).

Create a Template Based on the Settings Collection

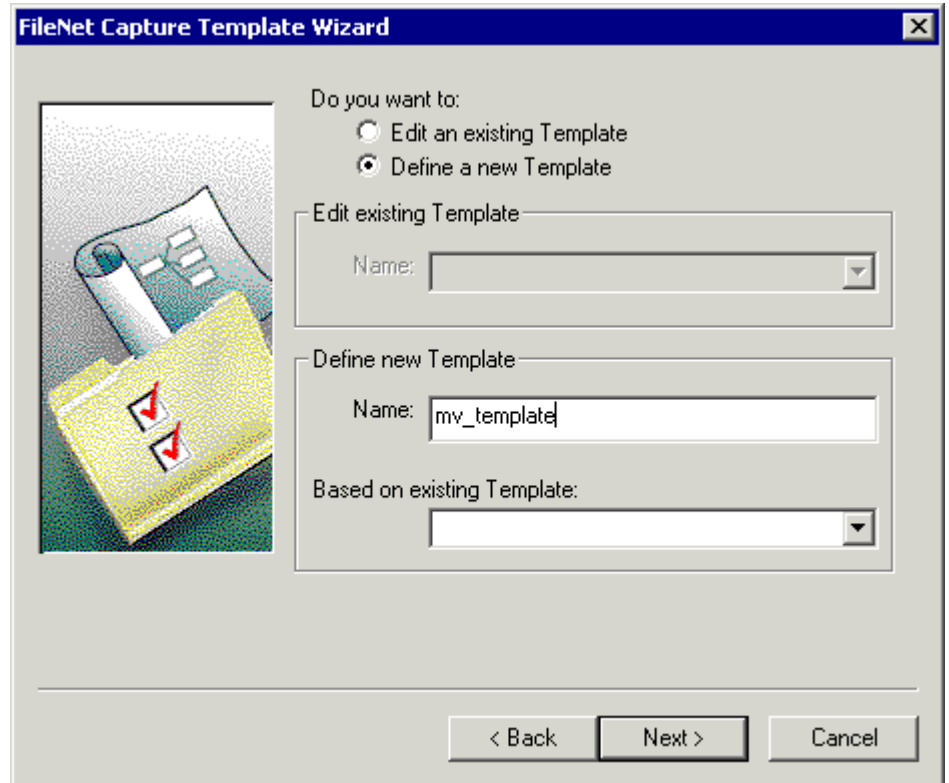
A template provides a basis for a batch. A template defines the settings collections and the capture path associated with a given batch. Each batch has one and only one template. A template has one or more settings collections, and at most one capture path associated with it. Refer to the online help for more information on templates. Use the New Template command to create a template for use on the library, as follows:

- 1 Open the File menu and click the **New** command. Then select **Template** from the secondary menu to start the Template wizard.

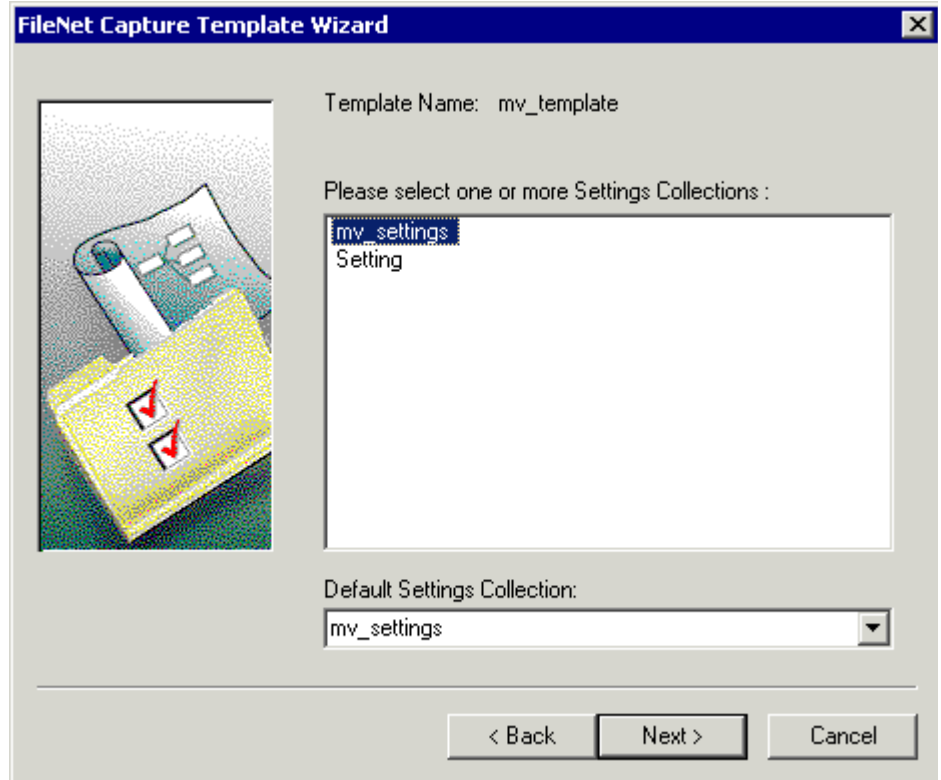
- 2 When prompted to select the repository, be sure to select the name of the library (Content Engine, Content Services, or Image Services library), not the Local Repository.



- 3 Select **Define a new Template**. Enter a name for the template in the Name field under the **Define new Template** section. You can choose an existing template to base your new template on by selecting a template in the **Based on existing Template** menu.



- 4 When prompted to select a settings collection, select the one you created in [“Create a Settings Collection Using an Existing Document Class” on page 1](#). (You can select additional settings collections, if they are available.) Click **Next**. For this example, you do not have to associate a capture path with the template.



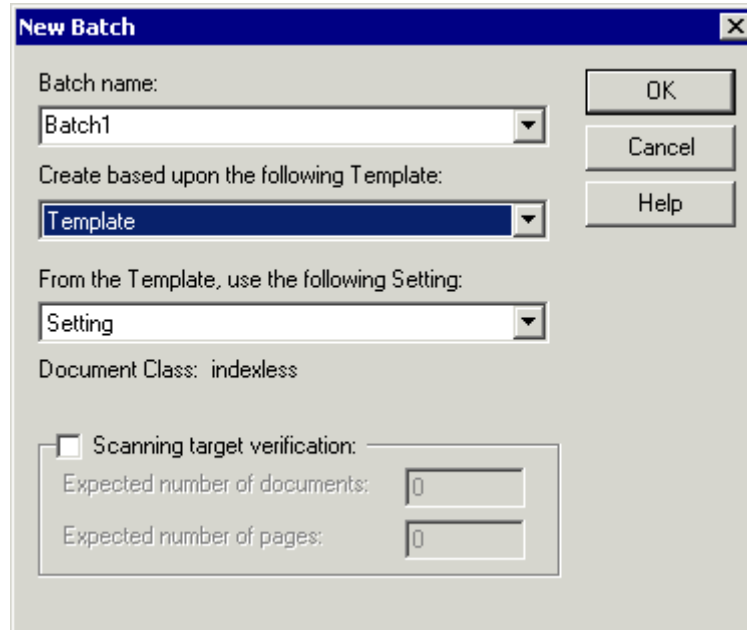
- 5 Click **Finish** to exit the Template wizard. The template is stored in the Template folder within the Config folder on the repository.

Create a New Batch Based on the Template

Once you have created a template, you can use it as the basis for the batch. When you create a batch, the batch inherits all of the configuration settings (the settings collection) that are defined for the template. Refer to the online help for more information on how to change settings for a batch or a template.

Use the New Batch command to create a new batch as follows:

- 1 Select a folder from the Tree view. (Do not select a folder within the Config node unless you are going to delete the batch when you are done with this example exercise.)
- 2 Open the Edit menu and click the **New Batch** command to create a new batch. This new batch will be based on a document class from your repository. Specify the new batch using the New Batch dialog box as follows:
 - a Enter a name for the batch, or leave the batch name field blank to automatically name the batch. (Contact your Image Services, Content Engine or Content Services system administrator for batch naming restrictions on your system.)
 - b Specify the template to use as a basis for the batch. Select the template that you created in [“Create a Template Based on the Settings Collection” on page 8](#).
 - c Select the settings collection you created as the Default Settings Collection in [“Create a Settings Collection Using an Existing Document Class” on page 1](#).



New Batch [X]

Batch name:
Batch1

Create based upon the following Template:
Template

From the Template, use the following Setting:
Setting

Document Class: indexless

Scanning target verification:

Expected number of documents: 0

Expected number of pages: 0

OK
Cancel
Help

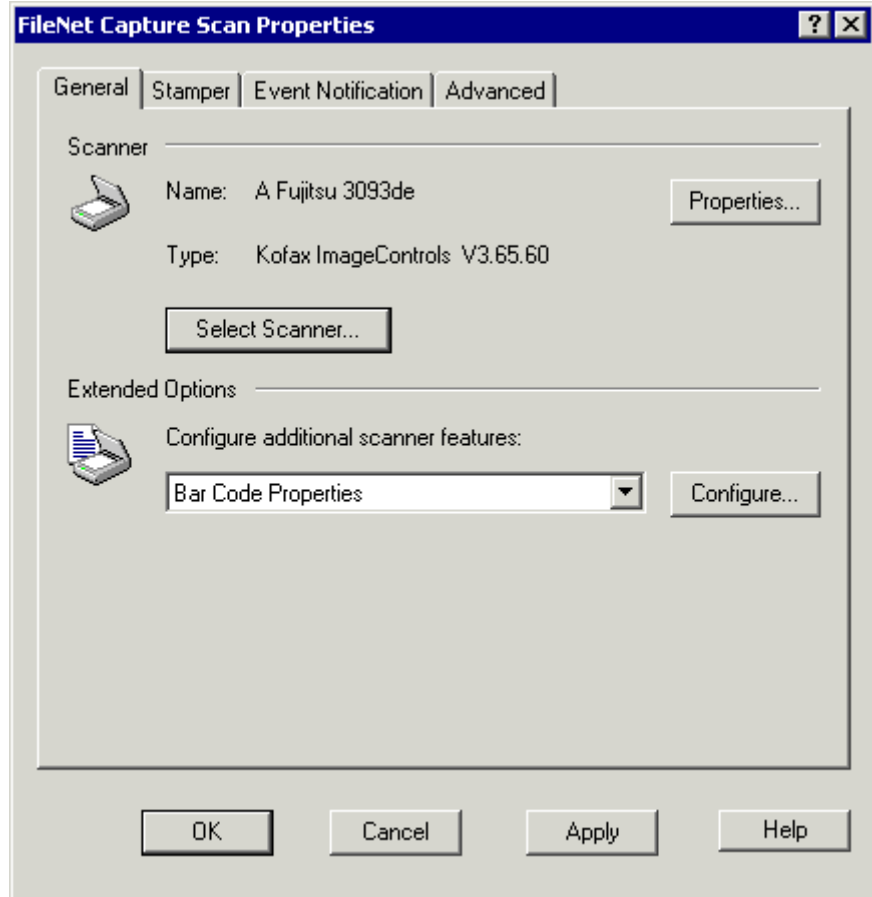
- 3 Click **OK** to create the batch. Continue to [“Load the Documents into the Scanner” on page 14.](#)

Load the Documents into the Scanner

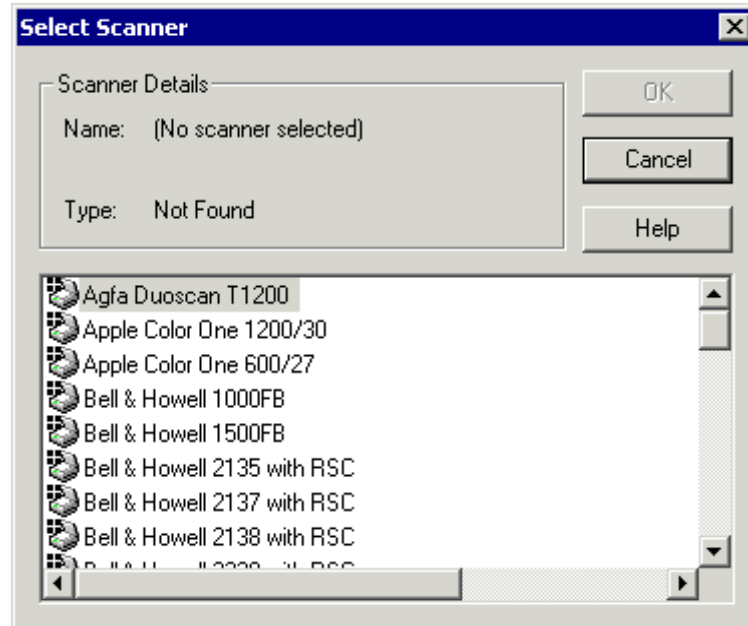
In this section, you will make configuration changes at the batch level. These configuration settings are stored with the batch, not with the settings collection. They are only used for the specific batch, and are not reflected in the settings collection or template.

Place the documents you want to scan into the scanner's feeder (or place a document on the glass for a flatbed scanner).

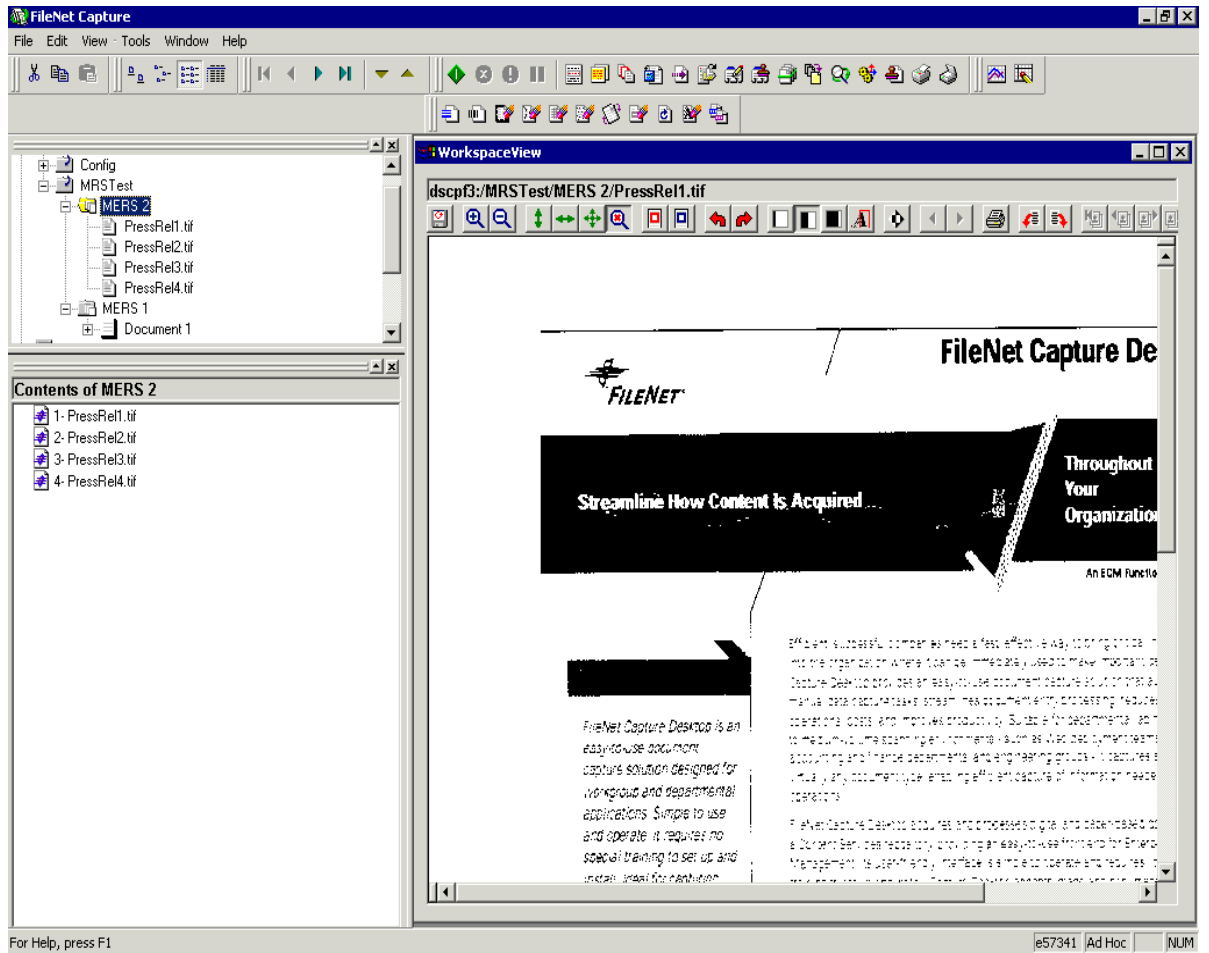
- 1 From the Tree view, highlight the batch you created in the previous procedure.
- 2 From the Tools menu, click the **Configure** command. Then select the **Scan** command to display the Scanner Controls dialog box.



- 3 In the Scanner Controls dialog box, click the General tab.
- 4 If a scanner driver is already configured, it will appear in the Scanner Type field. If the scanner driver is not configured, click **Select Scanner**, and then select your scanner driver from the displayed list.



- 5 Click **OK**.
- 6 From the Tools menu, click the **Start** command. Then select the **Scan** command. You should hear the scanner initialize, and then scan the document(s). A scanner without an auto feeder will prompt you to insert additional pages.
- 7 As each page is scanned, the acquired image displays as a page icon in the List view of the Capture Professional window. Double-click a page icon to display the page in the Workspace view.



You have now captured a batch of documents that you can assemble and process.

Using the Help System

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

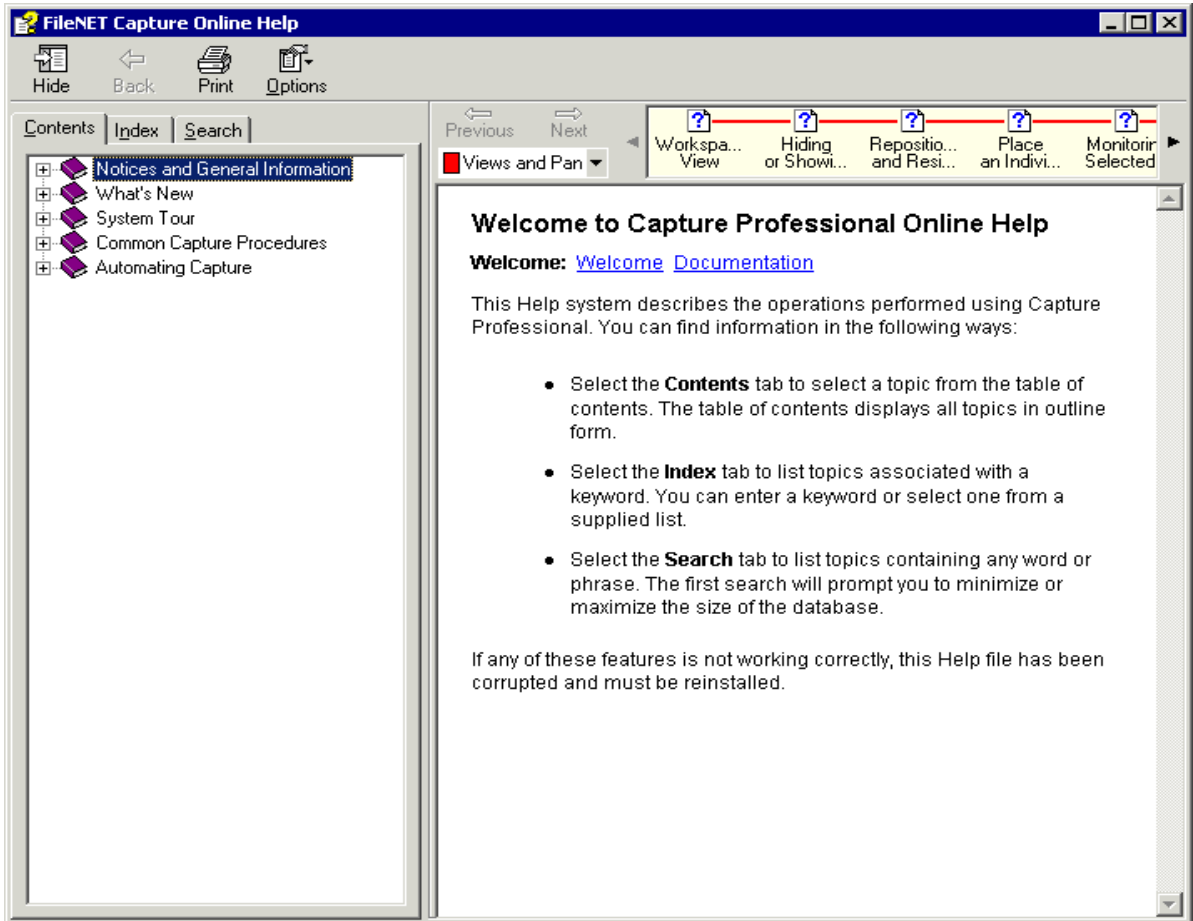
- The Contents tab is organized much like the Table of Contents in a printed book. Related topics and procedures are grouped together.
- The Index tab presents a list of specific words and topics, listed alphabetically.
- The Search tab locates all occurrences of a specific word or group of words.

The following steps present a brief sample of each method.

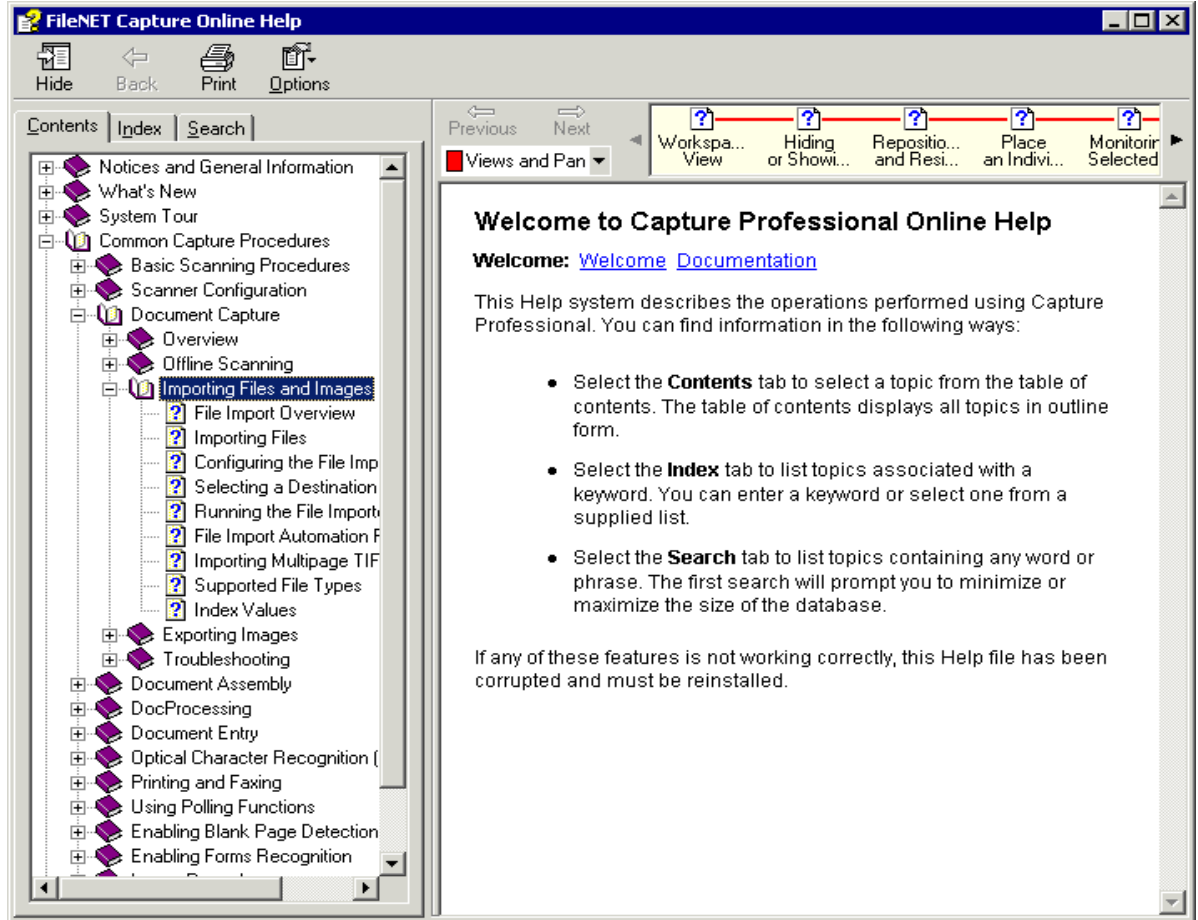
Note To display help for a specific dialog box, click **Help** or press the **F1** key.

Using the Contents Tab

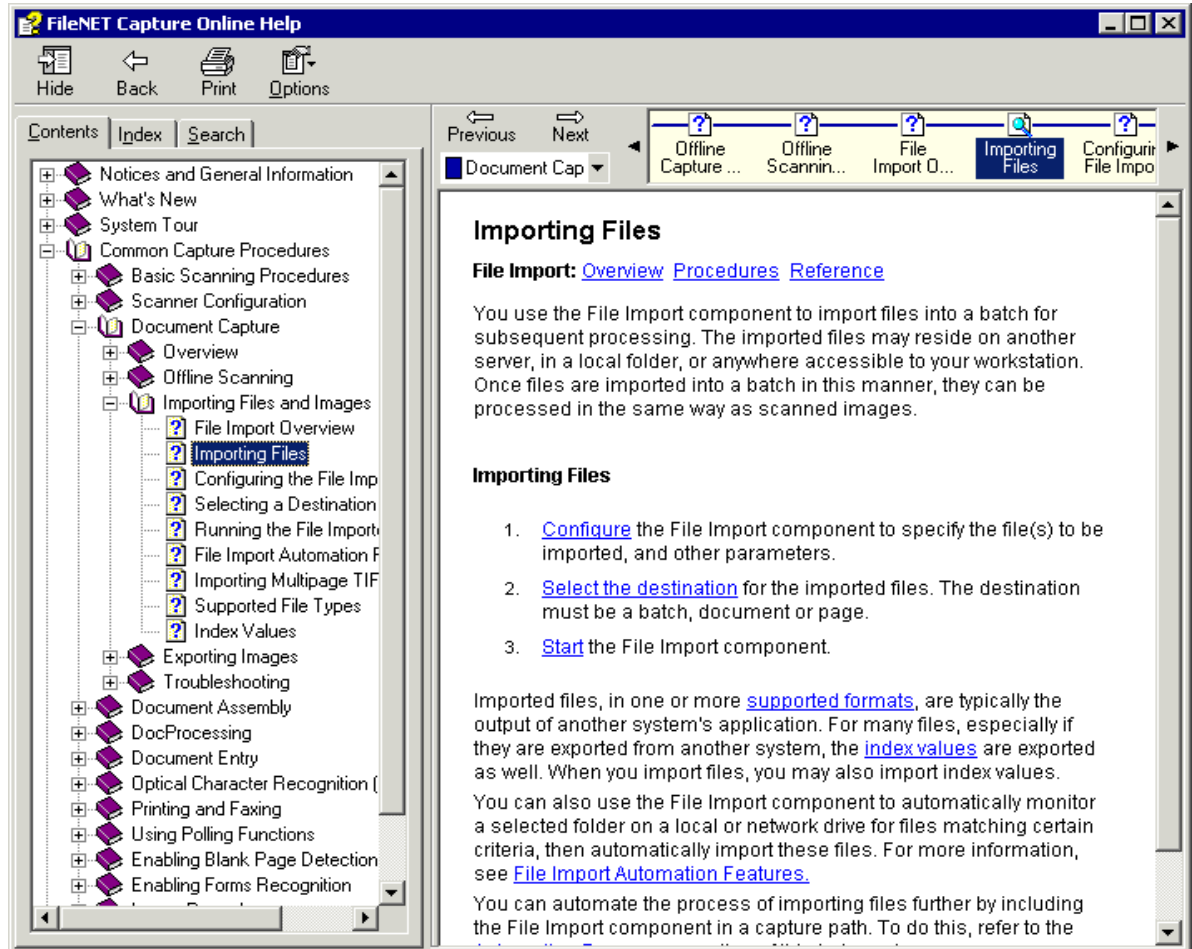
- 1 Select the **Help** menu and choose **Help Topics**. (Refer to the previous Capture illustration.)
- 2 In the Help Topics window, click the **Contents** tab to display the Table of Contents.



- 3 Expand the book titled “Common Capture Procedures,” and then expand the book titled “Document Capture.”
- 4 Expand the book titled “Importing Files and Images” to display a list of topics related to importing files.

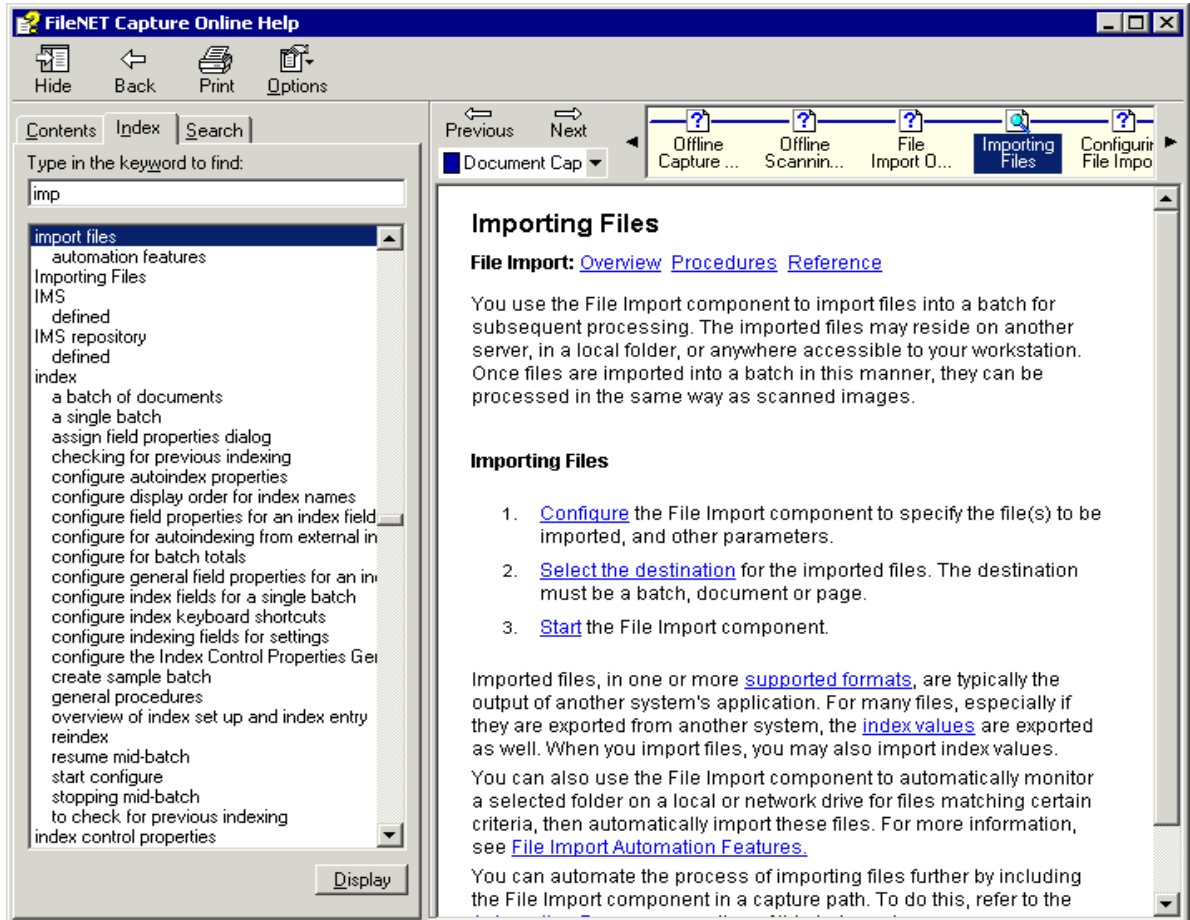


- 5 Double-click on the topic "Importing Files" to display the help topic.



Using the Index Tab

- 1 Click the **Index** tab and enter “imp” to jump to the import topics.



- 2 Click **Display** to display the first selected topic, which is the same as the topic you displayed earlier.

Using the Search Tab

- 1 Click the **Search** tab.
- 2 In the search field type the word “import” then click the **List Topics** button. Select the topic “Importing Files” from the list.

