

Course Guide

IBM Datacap 9.0.1: FastDoc Server mode

Course code F253 ERC 1.0



January 2017 edition

Notices

This information was developed for products and services offered in the US.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not grant you any license to these patents. You can send license inquiries, in writing, to:

*IBM Director of Licensing
IBM Corporation
North Castle Drive, MD-NC119
Armonk, NY 10504-1785
United States of America*

INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some jurisdictions do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM websites are provided for convenience only and do not in any manner serve as an endorsement of those websites. The materials at those websites are not part of the materials for this IBM product and use of those websites is at your own risk.

IBM may use or distribute any of the information you provide in any way it believes appropriate without incurring any obligation to you.

Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are fictitious and any similarity to actual people or business enterprises is entirely coincidental.

Trademarks

IBM, the IBM logo, and ibm.com are trademarks or registered trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the web at "Copyright and trademark information" at www.ibm.com/legal/copytrade.shtml.

© Copyright International Business Machines Corporation 2017.

This document may not be reproduced in whole or in part without the prior written permission of IBM.

US Government Users Restricted Rights - Use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM Corp.

Contents

Trademarks	vi
Course description	vii
Agenda	ix
Unit 1. FastDoc Datacap Server mode	1-1
What this unit is about	1
What you should be able to do	1
How you will check your progress	1
References	1
Unit Objectives	1-2
Lesson 1.1. Introduction to FastDoc Datacap Server mode	1-3
Introduction to FastDoc Datacap Server mode	1-4
Lessons	1-5
Why is this lesson important to you?	1-6
FastDoc Datacap Server interface	1-7
Introduction to FastDoc Datacap Server mode	1-8
Scan Task Interface	1-9
Configure document, pages and fields view	1-11
Configure Ruleset Properties	1-12
Configure workflow view	1-14
Configure Fingerprints	1-16
Run Batches in Datacap Server Mode	1-17
Demonstrations	1-19
Exercise: FastDoc Datacap Server mode	1-20
Exercise objectives	1-21
Lesson 1.2. Create an application with Form template	1-23
Create an application with Form template	1-24
Lessons	1-25
Why is this lesson important to you?	1-26
What is a FastDoc application template	1-27
Template Folder Structure	1-29
Create an Application	1-30
Wizard Mode window	1-31
Create a FastDoc Application	1-33
Create an application with Form template	1-36
Exercise: Create an application with Form template	1-38
Exercise objectives	1-39
Lesson 1.3. Create batch structure	1-41
Create batch structure	1-42
Lessons	1-43
Why is this lesson important to you?	1-44
Datacap Server mode	1-45
Start FastDoc and login to Datacap Server mode	1-46
Configure a document	1-47
Configure a page	1-48
Document integrity	1-49
Add Fields	1-50
Field Settings	1-51

Demonstrations	1-53
Exercise: Configure batch structure	1-54
Exercise objectives	1-55
Lesson 1.4. Configure form template rulesets	1-57
Configure form template rulesets	1-58
Lessons	1-59
Why is this lesson important to you?	1-60
Configure Forms template rulesets	1-61
Import files - Batch level ruleset	1-63
Convert Files To Images – Batch level ruleset	1-65
Image enhancement – Batch level ruleset	1-67
Image Enhancement ruleset	1-69
Recognize Pages and Fields ruleset (page object)	1-70
Fields properties settings	1-72
Fields properties settings	1-74
Recognize Pages and Fields ruleset (field object)	1-76
Demonstrations	1-78
Exercise: Configure form template rulesets	1-79
Exercise objectives	1-80
Lesson 1.5. Define fingerprints and test rulesets	1-81
Define fingerprints and test rulesets	1-82
Lessons	1-83
Why is this lesson important to you?	1-84
Fingerprint - Define Fingerprint	1-85
Fingerprint – Select Zones	1-86
What is design time testing?	1-87
Test pane profiles and rules	1-89
Test page history and results	1-90
Test pane error resolution	1-93
Demonstrations	1-94
Exercise: Define fingerprints and test rulesets	1-95
Exercise objectives	1-96
Lesson 1.6. Populate fields with keyword lookup	1-97
Populate fields with keyword lookup	1-98
Lessons	1-99
Why is this lesson important to you?	1-100
Add the Locate Fields Using Keyword ruleset	1-101
Configure Populate Fields Using Keyword ruleset	1-102
Select population methods	1-103
Locate the lookup term	1-104
Locate value with direction and grouping	1-106
Exercise: Populate fields with keyword lookup	1-108
Exercise objectives	1-109
Lesson 1.7. Configure validate field rulesets	1-111
Configure validate field rulesets	1-112
Lessons	1-113
Why is this lesson important to you?	1-114
Validate Fields ruleset	1-115
Common ruleset options	1-116
Length & Value Content ruleset options	1-118
Date ruleset options	1-120
Currency & Numeric ruleset options	1-121
Lookup ruleset options	1-123
Custom Error Message ruleset options	1-124
Exercise: Configure validate fields ruleset	1-125
Exercise objectives	1-126

Lesson 1.8. Export to IBM FileNet Content Manager	1-127
Export to IBM FileNet Content Manager	1-128
Lessons	1-129
Why is this lesson important to you?	1-130
Delivery options	1-131
Export configuration options	1-133
General export action	1-135
Select a Ruleset	1-136
Configure the Batch parameters	1-137
Configure the Document parameters	1-138
Configure the Field parameters	1-140
View IBM Repositories with Datacap Navigator	1-141
IBM FileNet repository configuration parameters	1-143
View Exported objects in the repository	1-144
Demonstrations	1-145
Exercise: Export to IBM FileNet Content Manager	1-146
Exercise objectives	1-147
Unit summary	1-148

Trademarks

The reader should recognize that the following terms, which appear in the content of this training document, are official trademarks of IBM or other companies:

IBM® and the IBM logo are registered trademarks of International Business Machines Corporation.

The following are trademarks of International Business Machines Corporation, registered in many jurisdictions worldwide:

DB2®

FileNet®

Initiate®

Tivoli®

WebSphere®

Microsoft and Windows are trademarks of Microsoft Corporation in the United States, other countries, or both.

Other product and service names might be trademarks of IBM or other companies.

Course description

IBM Datacap 9.0.1: FastDoc Server mode

Duration: 1 day

Overview

This course shows you how to work with Datacap FastDoc in Server mode. You create an application from Form Template and configure batch structure, rulesets, and fingerprints. You also configure export to an IBM FileNet Content Manager repository.

You work with a fully functioning IBM FileNet Content Manager system configured with IBM Content Navigator and IBM Datacap 9.0.1 students to practice the skills that are required to implement and configure data capture solutions.

Audience

- Application Builders who are responsible for building Datacap applications
- Anyone who needs to know the capabilities of FastDoc in Server mode

Prerequisites

The following courses or equivalent knowledge are required:

- IBM Datacap 9.0.1: Introduction (F251)
- IBM Datacap 9.0.1: FastDoc Local Mode (F252)

Skills taught

After completing this course, you should be able to:

- Build an Application from the FastDoc Form template
- Configure document batch structures in FastDoc
- Configure field recognition and validation rulesets in FastDoc
- Add a page fingerprint
- Design time testing of ruleset
- Populate fields with keyword lookup
- Configure Export rulesets to export to IBM FileNet Content Manager

Course outline

- Introduction to FastDoc Datacap Server mode
 - Create an application from the Form template
 - Configure the batch structure
 - Configure for template rulesets
 - Define fingerprints and test rulesets
 - Populate fields with keyword lookup
 - Configure validate field rulesets
 - Export to IBM FileNet Content Manager
-

Agenda

**Note**

The following unit and exercise durations are estimates, and might not reflect every class experience.

Day 1

Unit 1

(01:00) Lesson: 2.1, Introduction to FastDoc Datacap Server mode

(01:00) Lesson: 2.2, Create an Application with Form template

(01:00) Lesson: 2.3, Create batch structure

(01:00) Lesson: 2.4, Configure form template rulesets

(01:00) Lesson: 2.5, Define fingerprints and test rulesets

(01:00) Lesson: 2.6, Populate fields with keyword lookup

(01:00) Lesson: 2.7, Configure validate field rulesets

(01:00) Lesson: 2.8, Export to IBM FileNet Content Manager

Unit 1. FastDoc Datacap Server mode

What this unit is about

This course provides an overview for using Datacap on the Server mode. You create an application from the FastDoc application Form template using the Forms template.

What you should be able to do

- Create an application with Form template
- Create batch structure
- Configure form template rulesets
- Define fingerprints and test rulesets
- Populate fields with keyword lookup
- Configure validate field rulesets
- Export to IBM FileNet Content Manager

How you will check your progress

- Successfully complete the activities in the Student Exercises book.

References

IBM Knowledge Center

http://www.ibm.com/support/knowledgecenter/SSZRWW_9.0.1/com.ibm.datacap.doc/doc/datacap_9.0.1.htm

Unit Objectives

- Create an application with Form template
- Create batch structure
- Configure form template rulesets
- Define fingerprints and test rulesets
- Populate fields with keyword lookup
- Configure validate field rulesets
- Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-1. Unit Objectives

F2531.0

Notes:

Lesson 1.1. Introduction to FastDoc Datacap Server mode

Introduction to FastDoc Datacap Server mode

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-2. Introduction to FastDoc Datacap Server mode

F2531.0

Notes:

Lessons

- ▶ Introduction to FastDoc Datacap Server mode
 - Create an application with Form template
 - Create batch structure
 - Configure form template rulesets
 - Define fingerprints and test rulesets
 - Populate fields with keyword lookup
 - Configure validate field rulesets
 - Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-3. Lessons

F2531.0

Notes:

Why is this lesson important to you?

- As a Datacap business analyst, you must often quickly scan new data batches without having to go through a long development cycle.
- To do these tasks effectively, you must be familiar with the FastDoc Datacap Server mode interface.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-4. Why is this lesson important to you?

F2531.0

Notes:

FastDoc Datacap Server interface

- Run FastDoc as a Datacap Client. (Datacap Server mode)
 - Scan, index, and run background tasks on documents and image files.
 - This capability is in either the User or Admin Interface.
- Run FastDoc as a rapid application development tool.
 - Use Application Wizard to create Applications from default templates.
 - Standard Jobs and Tasks are defined for you in the templates.
 - Define the Batch Structure (DCO)
 - Configure workflows for capture, recognition validation, and export.
 - Define fingerprints.
 - Use the Test feature to verify that location and recognition are working as configured.
 - This capability is only available in the Admin interface.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-5. FastDoc Datacap Server interface

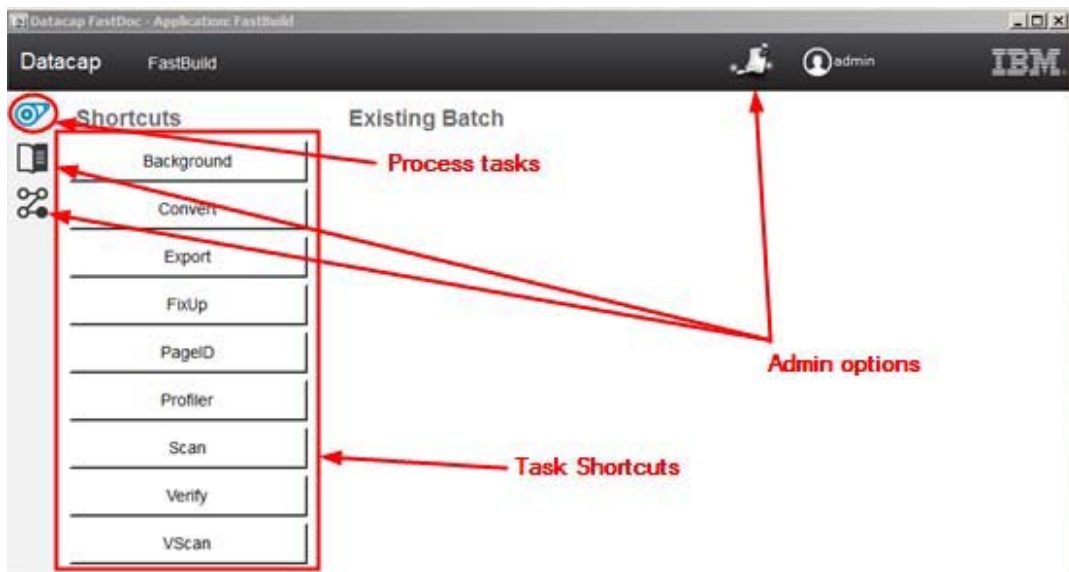
F2531.0

Notes:

FastDoc is a client that you can use to scan, index, and manually run background tasks on documents and image files.

- You can run FastDoc in a stand-alone environment, where FastDoc manages its own batches. Stand-alone mode was covered in the previous unit.
- You can run it as a client to the IBM Datacap Server in place of Datacap Desktop.
- You can also use FastDoc as a rapid application development tool.

Introduction to FastDoc Datacap Server mode



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-6. Introduction to FastDoc Datacap Server mode

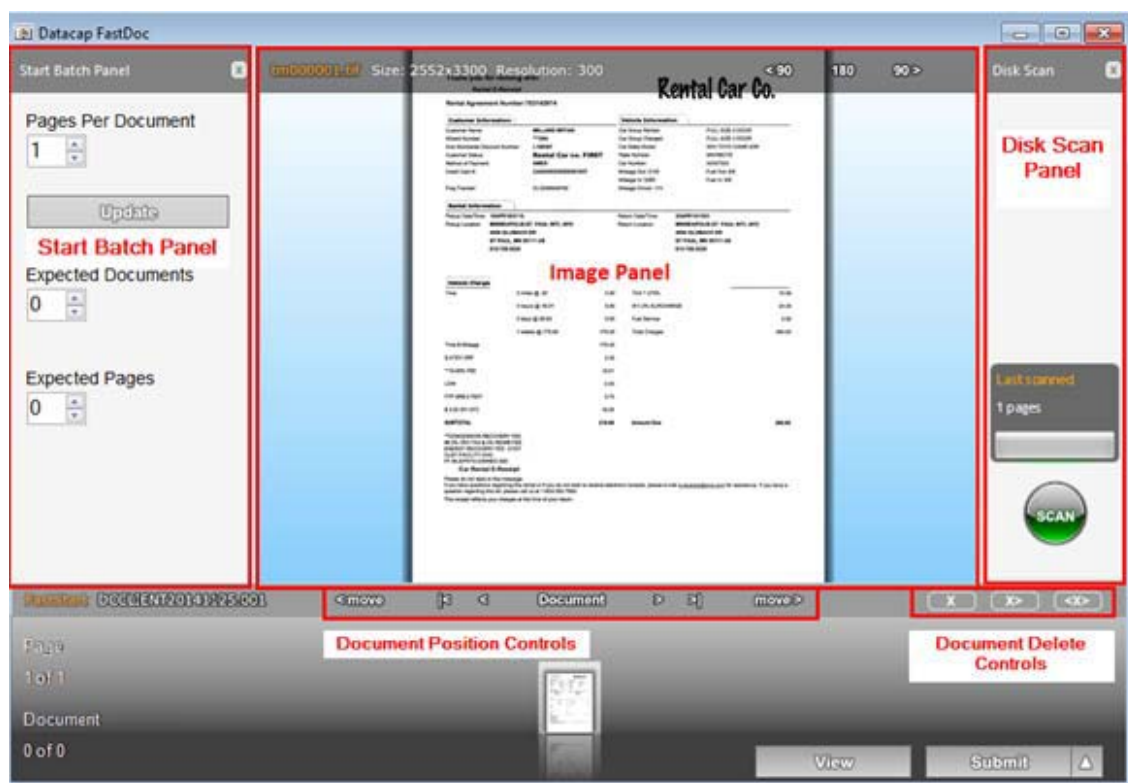
F2531.0

Notes:

The slide image represents the FastDoc online client time interface.

- Datacap Server mode is the online mode.
- The application name is in the heading of the interface.
- Shortcuts reference task profiles in the application.
- Unsupervised tasks – Profiler and Export – don't run automatically as in local mode.
- Therefore, it is necessary to have a task profile link for each so they can run manually.
- Alternatively, tasks that do not require operator intervention like PageID, Profiler, and Export, can be run unsupervised if they are configured to run in Rulerunner.

Scan Task Interface



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-7. Scan Task Interface

F2531.0

Notes:

The Scan Task Options

- Disk Scan (For processing digital images. Email, Fax, or digital images that were previously captured and stored on the disk.)
- ISIS Scan (For ISIS compatible scanners).
- TWAIN Scan (For TWAIN compatible scanners).
- Start Batch Panel. (To display the Start Batch Panel when scanning).

Scan task Interface

- Left Pane – Start Batch Pane. You enabled the Start Batch Panel with:
 - Start Batch Panel Task Option for the Offline mode.
 - tmweb > Administrator > Workflow > <Jobx> > iVScan, VScan, or Scan tasks > Setup FastDoc pane > Show the Start Batch Panel
 - Page Structure controls.

- Pages Per Document (To automatically separate documents when all of the documents have the same number of pages.)
- Expected Documents (The operator sets the expected number of documents in the batch and it checked programmatically during processing.)
- Expected Pages (The operator sets Expected number of pages (images) to limit the number of pages that are read at scan time.)
- Right pane – Scan type Panel. You select what is displayed in the Scan Type Panel from the View menu. The Task Option selections define what populates The View menu.
 - Disk Scan (For processing previously scanned or imported digital images.)
 - ISIS Scan (For scanning paper batches by using an ISIS compatible scanner.)
 - TWAIN Scan (For scanning paper batches by using a TWAIN compatible scanner.)
- Bottom pane with the gray background, Thumbnail images for each scanned page.
- Center pane – Selecting a thumbnail image causes it to be displayed in the Image pane.
- Thumbnail Control Bar.
 - Document Position Controls, you can select the thumbnail and position it to get pages in the correct sequence.
 - Document Delete Controls, you can delete one or more pages from the scanned images.
- Done menu list has three options selectable using the up arrow.
 - Done (Proceed with processing).
 - Hold (Suspend processing and place the Batch in the Active Existing Batches List on the Local View).
 - Cancel (End the batch, Advance it to the finished state).

Scan Procedure

- Click Scan in the Disk Scan Panel.
- Browse to and select one or more images to scan. Alternatively if you are scanning paper documents, click the view and select the ISIS or TWAIN device. If you select one of the scanner options, the Disk Scan Panel is replaced with the ISIS or TWAIN Scan pane. They have more knobs for setting Resolution, Brightness, and Contrast.
- Use the document position commands to arrange the order of the pages.
- Use the Document Delete Controls to delete unwanted images.
- Click Done to proceed with the next processing task.

Configure document, pages and fields view

- FastDoc (Admin) Datacap Server mode



- Configure the Batch Structure.
 - Add documents, pages, and fields.
- Configure Ruleset Properties.
 - Configure ruleset properties and Test profiles and rulesets.
- Configure fingerprints.
 - Add fingerprint classes, add a fingerprint page, and map page fields to image zones.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-8. Configure document, pages and fields view

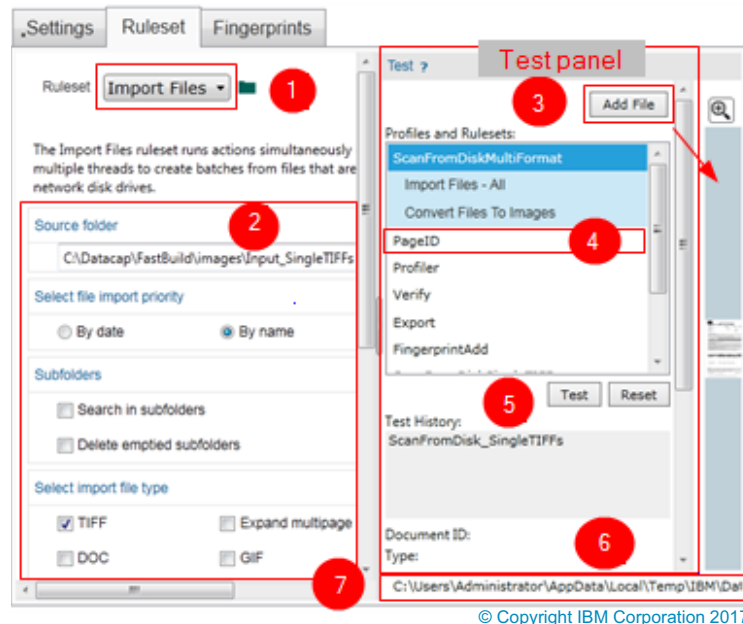
F2531.0

Notes:

Configure Ruleset Properties

- Configure Ruleset Properties and Test profiles

1. Select a Ruleset.
2. Configure ruleset properties.
3. Add an image file.
4. Select a profile.
5. Test profiles.
6. Scroll down and check results.
7. Check error log.



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-9. Configure Ruleset Properties

F2531.0

Notes:

Error log location

C:\Users\Administrator\AppData\Local\Temp\1\IBM\Datacap\FastDoc\<application name>\TestBatch

Log files

- You enable Rulerunner error log in the Rulerunner Manager on the “Logging” tab and the “RRS Log” subtab.
- A log file is created for each job task that is run.
- When you run profiles in the FastDoc test mode, you can disable rulesets in the profile.
- If no rulesets are disabled, (That is the complete profile is run) then the errorlog file that is created is named by using the following pattern:
 - <task name>_rrs, log (Generic example).
 - convert_rrs.log (Errorlog file for the Convert task profile).

- pageid_rrs.log (Errorlog file for the PageID task profile).
- profiler_rrs.log (Errorlog file for the Profiler task profile).
- If one or more rulesets are disabled, then the profile task name is dropped from the error log file name.
 - _rrs.log (Used for partial task profile).

Log content

- The type of information that is captured is the progress Rulerunner records as each action in the ruleset is run.
- The type and quantity of data that is logged is set in the Rulerunner Manager on the “Logging” tab and the “RRS Log” subtab.

Example:

- Which actions are being run.
- Parameter that is passed into the action.
- Results that are returned from the action.
- Logging Application ID (Rulerunner).
- Severity level.
- Thread and Process ID.
- Time and Date stamps.
- Time difference between entries.

Configure workflow view

- Jobs.
- Profiles.
- Rulesets.

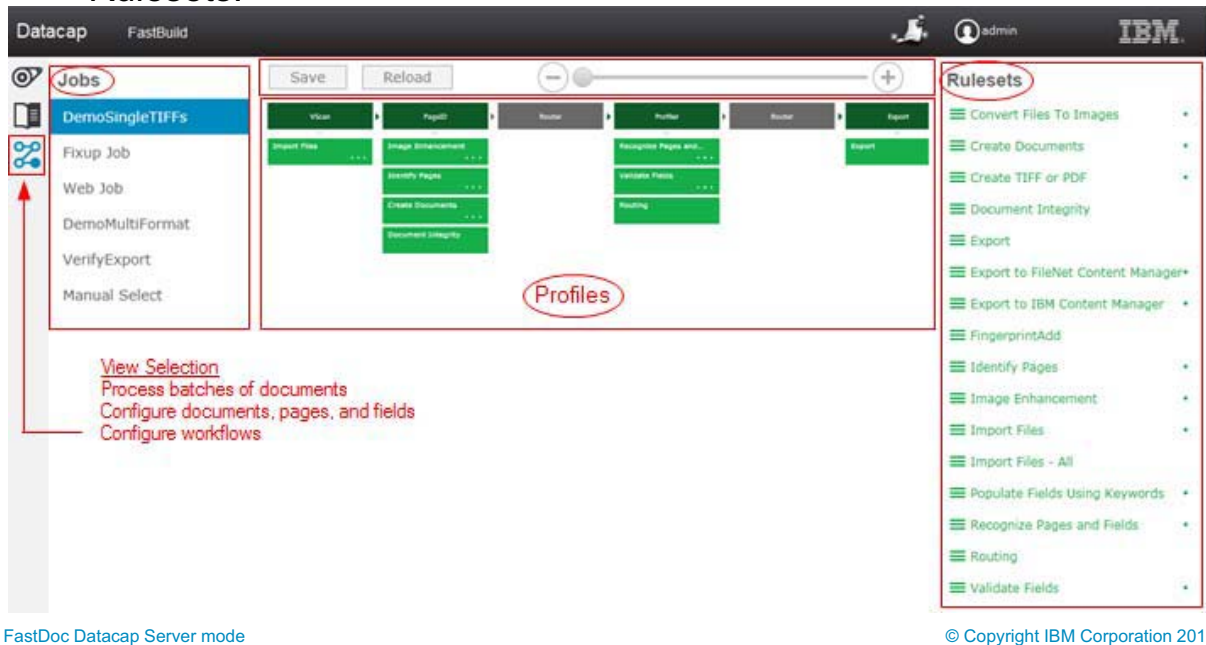


Figure 1-10. Configure workflow view

F2531.0

Notes:

Configure workflow view – has three primary areas.

Jobs - pane for selecting the defined job that you want to view or configure.

Profiles - pane for configuring the rulesets in profile. Drag rulesets into the profiles and order them.

Ruleset - selection pane. Select rulesets from here to build profiles.

- The Rulesets that are listed down the right side of the window are the rulesets available to this application.
- The list is a combination of all of:
 - The **.Rul.dll** files that are in the **C:\Datacap\<application>\dco_<application>\rules** folder.
 - The **.Rul.dll** files that are in the **C:\Datacap\RRS** folder.
- If you look at the **.rul.dll** files in these two folders, you see that most have an accompanying **.config** file. These rulesets are the UI or Compiled rulesets. Any new

rulesets that you create in Datacap Studio or that are carried over from earlier Datacap versions, do not have .config files. Therefore, these rulesets falls into the category of a conventional ruleset.

Ruleset Types - There are now two classes of rulesets.

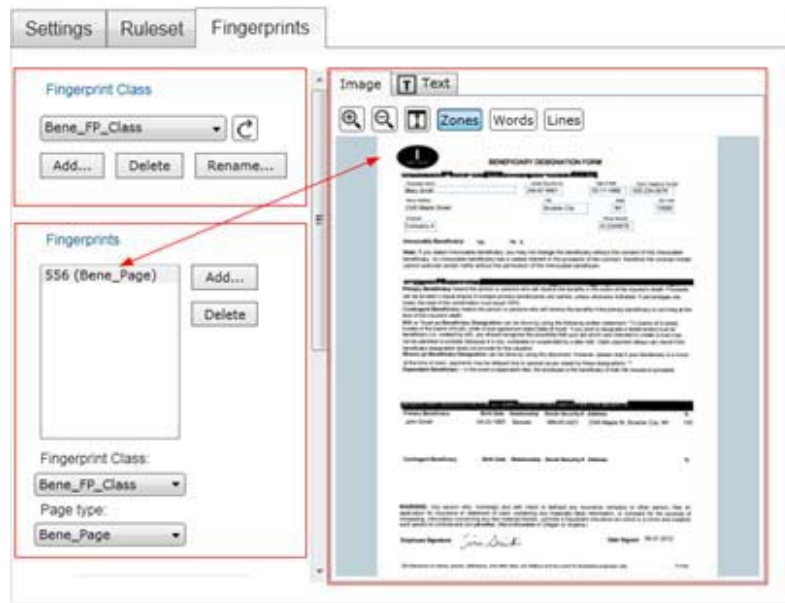
- Conventional rulesets - legacy or custom rulesets.
- UI Rulesets also referred to as Compiled Ruleset. Compiled Rulesets have additional information that is defined in a .config file that accompanies the rule file, which allows configuration of parameters for the ruleset within FastDoc.

Notice that in the FastDoc view the UI or Compiled rulesets are represented with three dots.

In FastDoc, the rulesets that are associated with a profile or task are listed in green boxes under the task name.

Configure Fingerprints

1. Add a Fingerprint class.
2. Add a Fingerprint image.
3. Select a Fingerprint class.
4. Select page type.



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-11. Configure Fingerprints

F2531.0

Notes:

- Fingerprints are defined to enable the identification of images by the position of data items on a page.
- When an image is identified by matching it to a fingerprint, it is quick to extract the data values from the fields that the zonal information defines that is stored in the fingerprint.
- Locating data on an image with the zonal information stored in the fingerprint is more efficient than other methods of locating data like doing key word searches.
- You can assign the fingerprints that you create to fingerprint classes to differentiate the forms that you receive from various sources.
- Fingerprint classes can be used to group fingerprints based on the source of the form.

Run Batches in Datacap Server Mode

- Start FastDoc(User).
- Click the VScan task to read documents.
 - Select image source.
- Run PageID task and watch the activity.
 - Image Enhancement, Identify Pages, Create Documents, Document Integrity.
- Run Profiler task and watch the activity.
 - Recognize Pages and fields, Validate fields, Routing.
- Verify task.
 - Validate and Correct fields, and Submit corrected pages.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-12. Run Batches in Datacap Server Mode

F2531.0

Notes:

- The profiles that are configured in FastDoc in the Datacap Server mode are saved on the Datacap Server.
- When Tasks are run in the Datacap Server mode, the profiles that are defined on the Datacap Server that FastDoc created, are used.
- These profiles are typically generic profiles and rulesets that are defined in the template that you used to build the application.
- The Application can be customized to any degree necessary using the Datacap Studio tool.
- Batch results are in <server>\Datacap\<Application>\batches\<date.num>.

Definitions:

- Image Enhancement – a process of correcting physical aspects of the image to make data extraction more reliable.

Examples are:

- Aligning the page so the rows are perfectly horizontal.
- Removal of horizontal or vertical lines.
- Despeckeling to remove irrelevant marks on the page.
- Inversion to convert black background to white or vice versa.
- Document Integrity – the process of checking the validity of data that is read from the image. Two methods of integrity checking are:
 - The use of built-in algorithms to determine the degree of confidence that a character read correctly.
 - The use of validation rules for checking other field attributes like:
 - Format, string, date time, integer, float, and so on.
 - Range, for number maximum and minimum, numeric, or alphabetic.

Demonstrations

- Explore the Process Batches view in Datacap Server mode
- Explore the Configure documents, pages, and fields view
- Explore Configure Workflow view in Datacap Server mode



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-13. Demonstrations

F2531.0

Notes:

If you are taking this course as a self-paced virtual class, return to the main course menu to play the pre-recorded demonstrations.

Exercise: FastDoc Datacap Server mode

Requires:
Course Exercise Guide
Student system

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-14. Exercise: FastDoc Datacap Server mode

F2531.0

Notes:

Exercise objectives

- Explore FastDoc Datacap Server mode



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-15. Exercise objectives

F2531.0

Notes:

Lesson 1.2. Create an application with Form template

Create an application with Form template

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-16. Create an application with Form template

F2531.0

Notes:

Lessons

- Introduction to FastDoc Datacap Server mode
- ▶ Create an application with Form template
 - Create batch structure
 - Configure form template rulesets
 - Define fingerprints and test rulesets
 - Populate fields with keyword lookup
 - Configure validate field rulesets
 - Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-17. Lessons

F2531.0

Notes:

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.
- To do this operation, you must be familiar with using the FastDoc user interface in the Datacap Server mode to configure documents capture types. In this lesson, you focus on using the Form template to configure a new application.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-18. Why is this lesson important to you?

F2531.0

Notes:

What is a FastDoc application template

- An advanced framework for creating an application.
- There are two templates released with Datacap 9.0.
 - Form.
 - Learning.
- Templates are provided to speed up application development.
- Templates can be used with Datacap Studio.
- Templates are functional applications.
- Developers can create their own templates.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-19. What is a FastDoc application template

F2531.0

Notes:

- A template is an advanced framework for creating a new Datacap application.
- There are two templates that are released with Datacap 9.0.
 - Forms Template - For fixed form layouts like application forms, and beneficiary forms.
 - Learning Template - For more dynamic forms like invoices.
- Templates were created to speed up application development with FastDoc.
- Templates can also be used when creating an application with Datacap Studio.
- Templates are functional applications with:
 - A built-in basic document hierarchy structure.
 - A batch workflow that is made up of the basic task profiles.
 - Commonly used configurable rulesets that are already built into the task profiles.
 - A pool of more rulesets for easily expand the task profiles capability.

- FastDoc has form design capabilities for further configuring your application.
- Save your own custom template.
 - If you have a base application that you routinely use for creating new application, you can save it as a template.
 - Your templates are just another application but it is good practice to never access them like an application w any of the development and production tools.
 - Always use the Application Wizard to copy and rename, then access the copy.

Template Folder Structure

- Template has the same folder structure as any other application.
 - batches.
 - dco_<Template Name>.
 - export.
 - fingerprints.
 - images
- Template has the same basic internal configuration as other applications.
 - Document Hierarchy (DCO).
 - A collection of Rulesets.
 - Task profiles.
- Template definitions are in the Datacap > Templates folder.
 - Templates from the Templates folder populate the templates list to choose from in the Application Wizard.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-20. Template Folder Structure

F2531.0

Notes:

- Template definitions are in the Datacap > Templates folder
 - Templates that are placed in the Templates folder populate a list of templates to choose from when creating a new application with the Application Wizard.

Create an Application

- When to create a new application:
 - A new process is required.
 - A new document type.
- Before you begin.
 - Decide on an application name.
 - Decide on a template or application for a starting point.
 - Decide where to place the new application.
- Start Application Wizard.
 - From Datacap Studio.
 - From FastDoc Admin interface.
- In the Application Wizard.
 - Click Next to see the Wizard Mode options.



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-21. Create an Application

F2531.0

Notes:

When to use

The procedure to create a new FastDoc application is done whenever there is a need for a new application to process different types of documents. Also, when a capture solution is required for a new department or a document handling procedure is being implemented.

Before you begin

Know which Application or template you want to copy.

Forms Template - For fixed form layouts like application forms, and beneficiary forms.

Learning Template - For more dynamic forms like invoices.

Know what you want to name the newly created application.

Know where you want to place it.

If you are going to use it in the Datacap Server mode or mixed Datacap Server and Local mode, then the Datacap Server is the better location.

Wizard Mode window

- Select your create option:
- Create an RRS application.
 - Create an application from a template.
- Create a CMIS-based application.
 - Create a CMIS compatible application from a template.
- Copy an application.
 - Create an application from an existing application.
- Convert an 8.0.1 application to 9.0 format.
 - Convert an application that is created on Datacap 8.0.1.
- Click Next to advance.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-22. Wizard Mode window

F2531.0

Notes:

CMIS Content Manager Interoperability Services:

- Is an open standard that CMISClient actions use to enable communication between Datacap applications and content management systems over the internet.
- This mode has the added advantage of automatically creating your document hierarchy from the document class definition on the repository.

The CMISClient actions:

- Configure the connection between Datacap applications and the IBM CMIS server.
- You run these actions to:
 - Access the CMIS server.
 - Set up document attributes and folders on the server.
 - Upload documents to the server for storage.

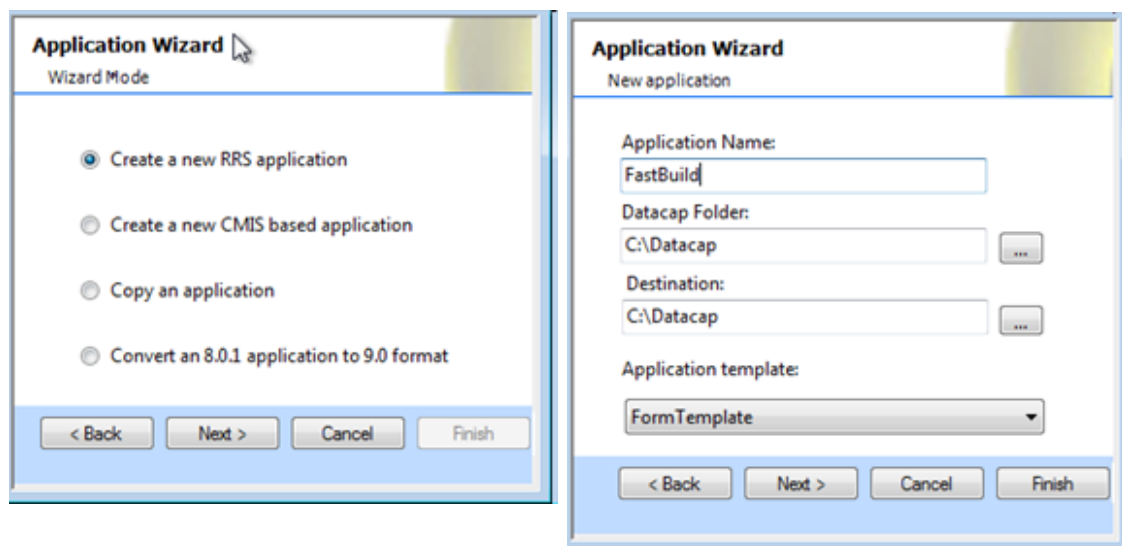
Note:

Convert 8.1 to Datacap 9.0

- There is automatic conversion process for converting application that is created on Datacap 8.1.
- Be aware of certain pitfalls when adapting Datacap 8.1 applications to run on Datacap 9.0.

Create a FastDoc Application

- Copy an existing application.
- Create an application from a template. (See procedure in the notes)



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-23. Create a FastDoc Application

F2531.0

Notes:

Preserve template integrity

It is a good practice to never connect to C:\Datacap\templates\Form or Learning templates directly. Preserve the templates and create a renamed copy of the template when creating a FastDoc application.

- Start FastDoc (Admin).
- Click Datacap Application Wizard icon in the upper right.
- Click Next.
- Click Create a new RRS application.
- Click Next.

Application Name:

- Type in a name for your new application.

Datacap Folder:

- Is the root folder for locating the templates that are displayed in the application template list.
- The Datacap folder is normally on the local system but it might be on another server.
- To select a folder on another server, the path would appear as:
`\\<server name>\Datacap`
- The wizard would expect to find a Template folder in this root folder.

Destination:

- Is the root folder for placing the application.
- This location might be on the local system but it more likely to be on the Datacap Server.
- To select a folder on another server, the path would appear as:
`\\<server name>\Datacap.`
- The wizard would create the new application at:
`\\<server name>\Datacap\<application name>`

Application template:

- Select a template to copy from the list. Type a name for the application that you are creating.
- For Datacap Folder browse to the Root folder on the Datacap server.
(Network\<server name>\Datacap) or (C:\Datacap)
- For Destination, select where you want the new application to be hosted.
(Network\<server name>\Datacap) or (C:\Datacap)
- Select an Application Template:
 - Form Template for known static page formats.
 - You know the types of data you want to capture.
 - You know where the data is on each image.
 - Usage examples: Application forms or Beneficiary form.
 - Learning for more dynamic documents.
 - You know the types of data you want to capture.
 - You do not know where the data is contained in the image on each image.
 - It might be different on each image.
 - Usage examples: Invoices or Shipping Inventories.
- Click Finish to complete the Application creation process.

- Click Next to advance to the Document Hierarchy and Add sample images windows.
- There is no need to configure Document Hierarchy here because it is normally done in the next phase of application creation in the FastDoc Admin Configuration interface. It can also be done in the Datacap Studio interface.
- Sample images can also be copied into the images folder later with Windows Explorer.
- Examine the Application Wizard log to verify that no errors occurred.
 - Click the Creation log link.

Next Steps

- Verify that a folder with the application name is created in the Folder that is identified in the Destination parameter.
- Start Datacap Application Manager - Start > All Programs > IBM Datacap Services > Datacap Application Manager
 - Verify that your new application appears in the menu in the left pane.
 - Select your new application and verify that database paths are created for at least the Adm, Eng, and Fingerprint database.
- **Local mode configuration**
 - While you are logged, in to FastDoc (Admin) in the Local mode and if you plan to process batches in the Local mode:
 - Configure a local batch for local processing
 - Configure an upload batch for uploading the batch to the Datacap Server for further processing.
 - How to do local mode configuration was the subject of the previous three lessons.
- Run FastDoc Admin interface in the **Datacap Server – Online mode**.
- Start customizing your application to recognize, identify, and process the expected pages.

Create an application with Form template

- Application Templates.
 - Are the starting point for rapid application development.
 - Form template for structured forms.
 - Learning template for dynamic document images.
 - Custom application templates.
- Applications.
 - Any Datacap client can run them.
 - You use a template to create a FastDoc application.
 - Applications samples that are used for class exercises:
 - FastStart is a legacy Datacap 8.1 application that is built from the FastApp template.
 - FastBuild you use the Form template to develop this application.
 - TravelDocs is a sample application released with Datacap 9.0.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-24. Create an application with Form template

F2531.0

Notes:

FastDoc Application

- A FastDoc application is just another Datacap application that any Datacap client can run. The distinguishing factor about FastDoc applications is that they use FastDoc actions that are defined specifically to interface with the FastDoc rapid application development capability.

Application Templates

- It is a good practice to keep the original copy of the application templates unmodified. When using the Datacap Application Wizard, create a new application from a template as the starting point for FastDoc Rapid Application Development. The FastDoc Rapid Application Development capability is explained later in this lesson.
 - Form template is the starting point for developing an application that processes document batches of images that have a static format with a predictable data layout like forms.

- Learning template is the starting point for developing an application that processes documents with a more dynamic layout. That is, they require more sophisticated locate rules. An example of an application for a Learning template application is an invoice.
- Developers can create their own custom application templates and place them in the C:\Datacap\templates folder. By placing an application in the templates folder, you enable it to be selected from a template list when you create an application with Datacap Application Wizard.

Applications

- Any Datacap client or service can run any Datacap application, irrespective of whether it was created by using Datacap Studio, FastDoc, or both.
- An application might be referred to as a FastDoc application if it is created from one of the templates and initially configured by using the FastDoc rapid development capabilities. This development process does not prevent any client from running its tasks nor does it prevent Datacap Studio from enhancing its functions.
- FastStart - Is a FastDoc application unique to this course. It was developed with Datacap release 8.1 from the FastApp template. It was configured with FastDoc to recognize and process three different document types. FastStart was created specifically for this class and is used in Lesson 1.2. to demonstrate the processing of the three document types in the FastDoc Local mode. FastDoc Local mode is explained later in this lesson.
- FastBuild - Is a FastDoc application that you build in this course. It is created starting from the Form application template. FastBuild is created in Lesson 1.3 and configured to recognize and process two different formats of the same document type.
- TravelDocs – Is a sample application that is released with the Datacap 9.0 release. It process car rental receipts, air ticket receipts, and hotel accommodation receipts.

Exercise: Create an application with Form template

Requires:
Course Exercise Guide
Student system

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-25. Exercise: Create an application with Form template

F2531.0

Notes:

Exercise objectives

- Create an application with the Form template



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-26. Exercise objectives

F2531.0

Notes:

Lesson 1.3. Create batch structure

Create batch structure

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-27. Create batch structure

F2531.0

Notes:

Lessons

- Introduction to FastDoc Datacap Server mode
- Create an application with Form template
- ▶ Create batch structure
 - Configure form template rulesets
 - Define fingerprints and test rulesets
 - Populate fields with keyword lookup
 - Configure validate field rulesets
 - Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-28. Lessons

F2531.0

Notes:

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.
- To do this operation, you might be called upon to configure an application in FastDoc after it is created from a template with the Application Wizard. Or, you might be required to add the document recognition, and validation configuration for a document. In this lesson, you learn Configuring the Document Hierarchy for the document.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-29. Why is this lesson important to you?

F2531.0

Notes:

Datacap Server mode

- FastDoc in the Datacap Server mode can:
 - Be used as an administrator or user interface.
 - Run as a client on a Datacap Workstation.
 - Run tasks on the Datacap server machine.
 - Configure document structure and workflows. (Admin Interface only)
- This mode is referred to as the Datacap Server Mode.
 - Also, the Online mode.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

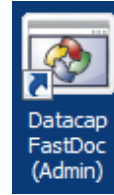
Figure 1-30. Datacap Server mode

F2531.0

Notes:

Start FastDoc and login to Datacap Server mode

- Start FastDoc (Admin) interface in the Datacap Server mode.
 - Administrator Version, FastDoc (Admin).
- Run Mode.
 - Datacap Server – Online.
- Password = admin.



Welcome to Datacap

☐ Local ☒ Datacap Server

Application
FastBuild
User
admin
Password
Station
1

Login

IBM

FastDoc Datacap Server mode

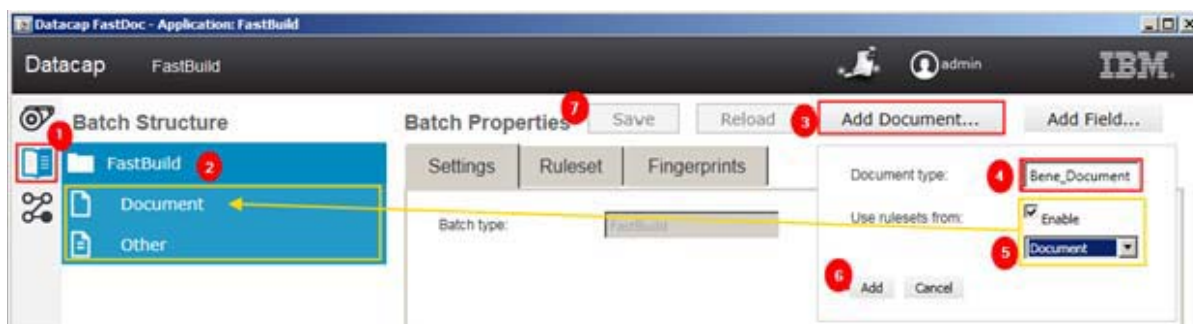
© Copyright IBM Corporation 2017

Figure 1-31. Start FastDoc and login to Datacap Server mode

F2531.0

Notes:

Configure a document



- Select Configure Documents, Pages, and Fields view.
- Select Batch.
- Add documents, click Add document... See Note 1.
- Name the Document type.
- Specify which ruleset group to use. See Note 2
- Complete the process, click Add.
- Save changes.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-32. Configure a document

F2531.0

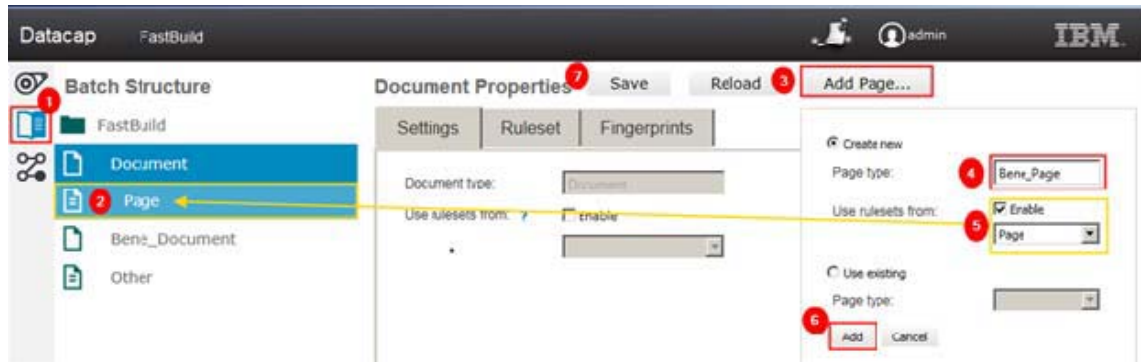
Initiate the add documents procedure

- Never edit the default document (Document).
- Always create new documents.
- Treat the Document default objects as templates that should not be changed.
- When your DCO configuration and Rulesets are customized, you can always use them as templates for other document types.

Specify which ruleset group to use

- If you don't specify, your documents are not processed as expected.
- Selecting Document in the "Use rulesets from" list causes you to use the rulesets directly out of the Form template.
- When you have defined, other documents you can select their rulesets for your new document.
- Rules are set to be shareable.

Configure a page



- Select Configure Documents, Pages, and Fields view.
- Select Bene_Document.
- Add page, click Add Page. See Note 1
- Name the Document type.
- Specify which ruleset group to use. See Note 2
- Complete the process, click Add.
- Save changes.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-33. Configure a page

F2531.0

Notes:

Initiate the add documents procedure

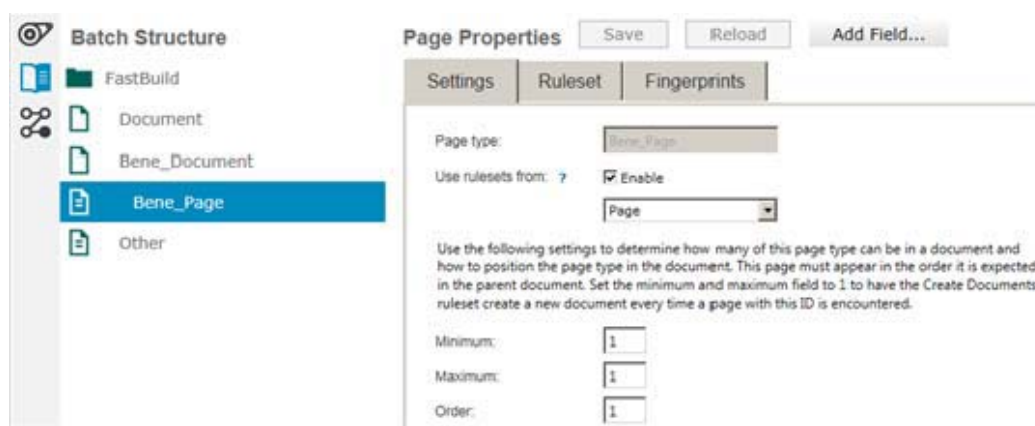
- Never edit the default pages (Page and Other).
- Always create new pages.
- Treat the Other and Page default objects as templates that should not be changed.

Specify which ruleset group to use.

- If you don't specify, your documents are not processed as expected.
- Selecting Page in the "Use rulesets from" list causes you to use the rulesets directly out of the Form template.
- When you defined other pages, you can select their rulesets for your new document.

Document integrity

- Verify “Use Rulesets from” Document.
 - “Use ruleset from” in enabled and Document is selected.
- Verify “Use Rulesets from” Page.
 - “Use ruleset from” in enabled and Page is selected.
 - Set Minimum, Maximum, and Order all to 1.
- Save.



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-34. Document integrity

F2531.0

Notes:

Verify Use Rulesets from Document

- On the Bene-Document object in the Batch Structure on the Settings tab, verify that “User ruleset from” in enabled and Document is selected.

Verify Use Rulesets from Document

- On the Bene-Page object in the Batch Structure on the Settings tab, verify that “User ruleset from” in enabled and page is selected.

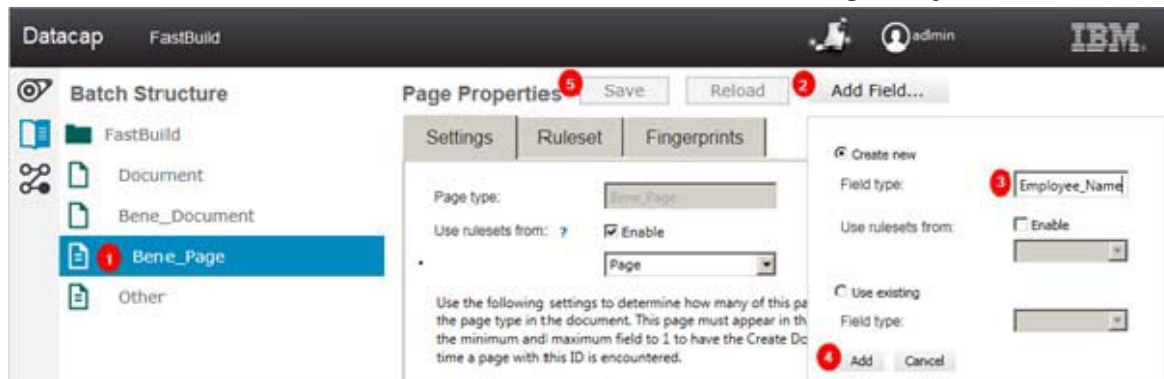
Set Minimum, maximum, and Order

- These properties are:
 - Not inherited from page rulesets.
 - Required otherwise the document is not created for each page.

Remember to always save your changes.

Add Fields

You can add fields at the Batch, Document, and Page objects.



- Select Object in the Batch Structure.
- Start the add field procedure, click Add field ...
- Name the field.
- Complete the process, click Add.
- Save changes.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-35. Add Fields

F2531.0

Notes:

No fields are defined in the form template so there are no field Rulesets to inherit.

Field Settings

- Visible option must always be set
- Other options:
 - Display name: is the label on the Verify panel.
 - Use rulesets from: Enable. See note
 - SQL select: for getting selection list components from a database.
 - SQL lookup: populate a field with the selected value.
 - Data type mask: Select the type of value. See notes
 - Optical mark: Enable
 - Dictionary: Add an entry for each optical mark.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-36. Field Settings

F2531.0

Notes:

Visible option

- If Visible option is not set, then the field does not appear on the verify panel.

Use rulesets from:

- On the previous create field slide, this option was not selected because there were no fields that are defined in the Forms template. If you are defining a new page, and a field of the same type is already configured with the same processing requirement, you can select it here.

Data type:

- Alphabetic
- Integer
- Floating Point
- Date

- Time hh:mm:ss
- Currency

Context help

Some options have a live? for help. Click the? mark to display context-sensitive help for those options.

Demonstrations

- Create a batch structure in FastDoc Server mode



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-37. Demonstrations

F2531.0

Notes:

If you are taking this course as a self-paced virtual class, return to the main course menu to play the pre-recorded demonstrations.

Exercise: Configure batch structure

Requires:
Course Exercise Guide
Student system

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-38. Exercise: Configure batch structure

F2531.0

Notes:

Exercise objectives

- Create a batch structure



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-39. Exercise objectives

F2531.0

Notes:

Lesson 1.4. Configure form template rulesets

Configure form template rulesets

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-40. Configure form template rulesets

F2531.0

Notes:

Lessons

- Introduction to FastDoc Datacap Server mode
- Create an application with Form template
- Create batch structure
- ▶ Configure form template rulesets
 - Define fingerprints and test rulesets
 - Populate fields with keyword lookup
 - Configure validate field rulesets
 - Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-41. Lessons

F2531.0

Notes:

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.
- You are required to configure an application in FastDoc after it is created from a template with the Application Wizard. In this lesson, you learn to configure the page identification and field recognition rulesets.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-42. Why is this lesson important to you?

F2531.0

Notes:

Configure Forms template rulesets

- Batch level.
 - Import Files.
 - Identify Pages.
 - Convert Files To Images.
- Create Documents.
- Document level.
 - None.
- Page level.
 - Image Enhancement.
 - Recognize Pages and Fields.
- Field level.
 - Recognize Pages and Fields.
 - Validate Fields.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-43. Configure Forms template rulesets

F2531.0

Notes:

Configuring rulesets for the application

- After you set up the documents and fields to process, you can configure the rulesets to run on the application that is based on the template that you are using.
- You configure rulesets to run on the batches, documents, pages, and fields that are in the application in Datacap Server mode.

Batch level rulesets

- Import Files - no configuration is required for Form template.
- Identify Pages – no configuration is required for Form template.

Configure how Page Identification is done.

Default settings:

- Fingerprinting.
- Convert files To Images.

Convert file images to a different format before processing. This ruleset is only needed if the import files are other than TIFF.

- Create Documents.

Default settings: No Options set.

Document level rulesets

No Document Rulesets.

Page level rulesets

- Image Enhancement.

Default settings:

- Deskew.
- Remove Lines.
- Border Removal.

- Recognize Pages and Fields.

Default settings: No Options set.

Field level rulesets

- Recognize Pages and Fields.

Default settings: No Options set.

- Validate Fields.

Default settings: No options set.

Configure rulesets general procedure:

1. Start FastDoc in Datacap Server mode.
2. On the Datacap window, click the Configure workflow icon.
3. Select the job that you want to run and click the Configure documents, pages, and fields icon.
4. In the Batch Structure pane, select the name of the application and click the Rulesets tab.
5. Configure the following rulesets for the appropriate batch structure level in the application:
6. Use the Test tab to confirm that the processing is working correctly and make corrections as needed.
7. Process real documents.

Import files - Batch level ruleset

- Create batches from files that are stored on a local or network drives.
- Import Files UI properties.
 - Source folder.
 - Example: C:\Datacap\<application name> images\Input_SingleTIFFs
 - Priority by date or alphabetically by name.
 - Subfolders.
 - Search in subfolders.
 - Delete emptied subfolders.
 - Select import file type.
 - Maximum number of files to import.
 - Copy image folder.
 - Problem image folder.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-44. Import files - Batch level ruleset

F2531.0

Notes:

Import Files - no configuration required.

- Default settings are:
- Source and Copy folder = C:\Datacap\<application name> images\Input_SingleTIFFs.
- Select file import priority = By name.
- Import File type = TIFF.
- Maximum number of files to import = 50.

Import Files UI properties

- Source folder.
- Define the folder to read input files from.
- Priority by date or alphabetically by name.
- By date - causes documents in the batch to be sorted by date.
- By name - causes documents in the batch to be sorted by name.

- Subfolders.
- Search in subfolders.

Also, search the subfolders of the Source folder for more images to scan.

- Delete emptied subfolders.

When images are read and relocated delete remaining empty subfolders.

- Select import file type

Select the file types to expect in the source files.

If more than one file type is expected, then you can use the Convert Files To Images ruleset to convert them all to .TIFF format before processing.

- Maximum number of files to import.

This option allows large volumes of pages to be read in manageable size batches.

Options are: 1, 10, 25, 50, 100, All or set some custom value.

- Copy image folder

Images are copied to this folder when the batches are queued.

- Problem image folder.

- Any unidentifiable pages are placed here.

Convert Files To Images – Batch level ruleset

- Convert file images to a different format before processing.
- This ruleset is only needed if the import files are other than TIFF.
- Convert Files To Images UI properties.
 - File naming pattern.
 - Hierarchical – name = ADADADAD.xxx.
 - Sequential – name = TMnnnnnnn.xxx.
 - Source Page.
 - Remove page after processing.
 - Set page to DELETED after processing.
 - Leave Pages in batch after processing.
 - Only process pages with status scan OK.
 - File formats to convert.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-45. Convert Files To Images – Batch level ruleset

F2531.0

Notes:

Convert Files To Images

- Default settings:
- File naming pattern = Sequential.
- Remove pages after processing.
- All file formats selected for conversion.

Convert Files To Images ruleset UI properties

- File formats to convert
- Bitmap
- Multi-page TIFF
- ZIP Archive Expansion
- PDF
- Microsoft Word Conversion

- Microsoft Excel Conversion
- HTML Conversion
- RTF Conversion

Image enhancement – Batch level ruleset

- Goal of image enhancement.
 - Eliminate artifacts that interfere with recognition.
- Affects of image enhancement.
 - Option that you select affect all images that the application processes.
- When to complete image enhancement.
 - On fingerprint images, when you are setting up the fingerprint library.
 - Again on your document images after input but before page identification.
- Configure image enhancement.
 - In Batch Structure, select page.
 - Click the Ruleset tab and select Image Enhancement ruleset.
 - Open image file...
 - Configure options and view results immediately in the dual image pane.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-46. Image enhancement – Batch level ruleset

F2531.0

Notes:

Goal of image enhancement

- To eliminate lines, shading, misalignment, and other artifacts that can interfere with the recognition process.

Affects of image enhancement

- Image enhancement is typically done before the page type is known, in other words, before page identification. You must set up the image-processing properties in a way that works well for all page types.

When to complete image enhancement

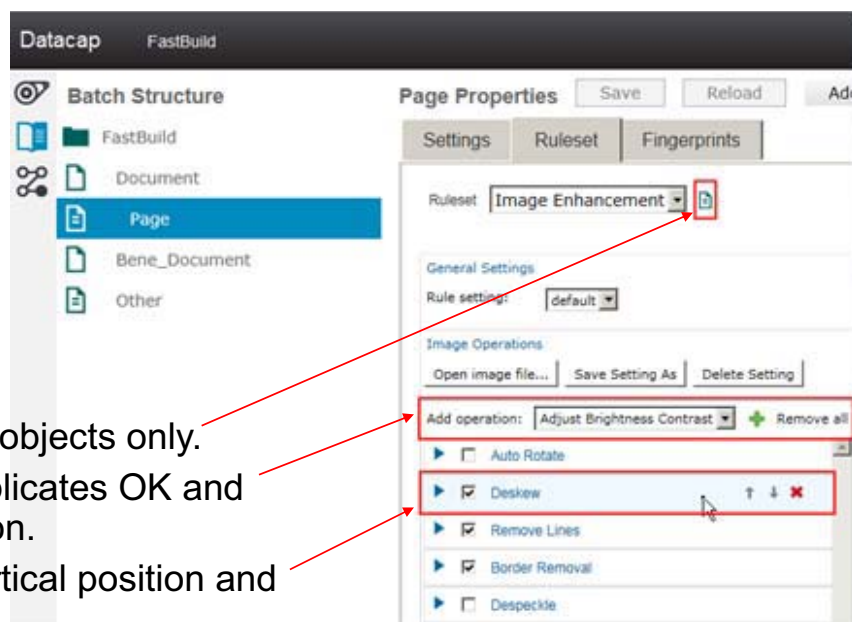
- You complete image enhancement on fingerprint images when you are setting up the fingerprint library.
- You must complete it again on your document images after input but before page identification.

Configure image enhancement

- Default options that are inherited from the Form template Page object are:
- Deskew
- Remove Lines
- Boarder Removal

Image Enhancement ruleset

- Applies to Page objects only.
- Add options Duplicates OK and Remove all option.
- Hover to see vertical position and remove controls.



FastDoc Datacap Server mode

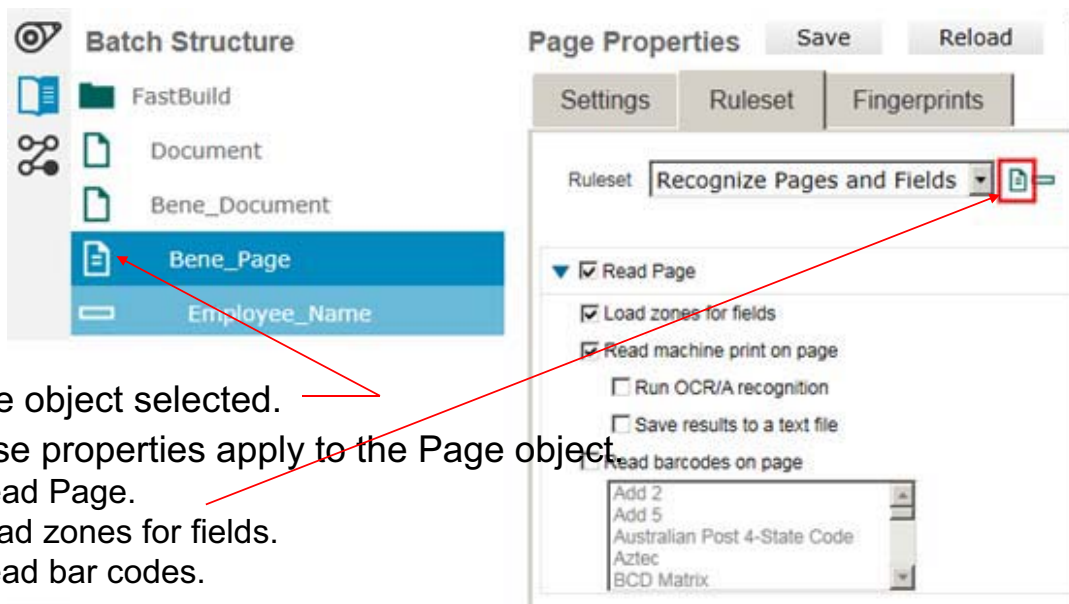
© Copyright IBM Corporation 2017

Figure 1-47. Image Enhancement ruleset

F2531.0

Notes:

Recognize Pages and Fields ruleset (page object)



- Page object selected.
- These properties apply to the Page object.
 - Read Page.
 - Load zones for fields.
 - Read bar codes.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-48. Recognize Pages and Fields ruleset (page object)

F2531.0

Notes:

Page Properties

- Read Page
- You need to select read the page to read all of the page content. The resulting finger print is compared against saved fingerprints to identify the page.
- Load Zones for field.
- Load the defined field zones from the fingerprint file.
- Read machine print on page.
- Select the option for reading machine print.
- Don't use this option if your fields are handwritten. It is very time consuming to continually search for machine code with many hand written fields.
 - Run OCR/a recognition.
 - Save Results to a text file.

Place a text file in the batches folder that contains all of the text that is read from the page. It is the text version of the fingerprint.

- Read bar code on page
- Select this option if you identify the page with a bar code.

Fields properties settings

- Field type.
- Display name.
- Use rulesets from.
- Visible.
- SQL select.
- SQL lookup.
- Data type mask.
- Optical mask.
- Allow multiple settings.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-49. Fields properties settings

F2531.0

Notes:

Field type

- Name that is assigned when the field was created.

Display name

- An optional name to substitute for the Field type when the field is displayed.

Use rulesets from Enable

- Inherit rulesets for this field from another field.

Visible

- It is important that this field is always set or the field does not appear on the verify panel.

SQL select

- A SQL statement to extract the required value from a SQL database.

SQL lookup

- A SQL statement to populate the field with a lookup on a SQL database.

Data type mask

- A list to select a specific data type:
- Alphanumeric.
- Integer.
- Floating Point.
- Date.
- Time HH:MM:SS.
- Currency.

Optical mask Enable

- Define this field as an Optical Mask Recognition field.
- See next slide for more detail.

Allow multiple settings Enable

- See next slide.

Dictionary

- See next slide.

ADD

- See next slide.

Fields properties settings

Optical mark: ☒ ?

Dictionary:

☒ Enable

☐ Allow multiple selections

Value	Display Text			
	One Time	↓	↑	✕
	Monthly	↓	↑	✕
	Quarterly	↓	↑	✕
	Annual	↓	↑	✕

Add

- Optical mask Enable.
- Allow multiple settings.
- Dictionary.
- Add.

Figure 1-50. Fields properties settings

F2531.0

Notes:

Data type mask

- A list to select a specific data type:
- Alphanumeric
- Integer
- Floating Point
- Date
- Time HH:MM:SS
- Currency

Optical mask Enable

- Define this field as an Optical Mask Recognition field.
- The field consists of one or more:
- Check boxes

- Radio buttons
- Other mark objects

Allow multiple settings Enable

- If the field is an OMR field, allow multiple options to be checked or selected.

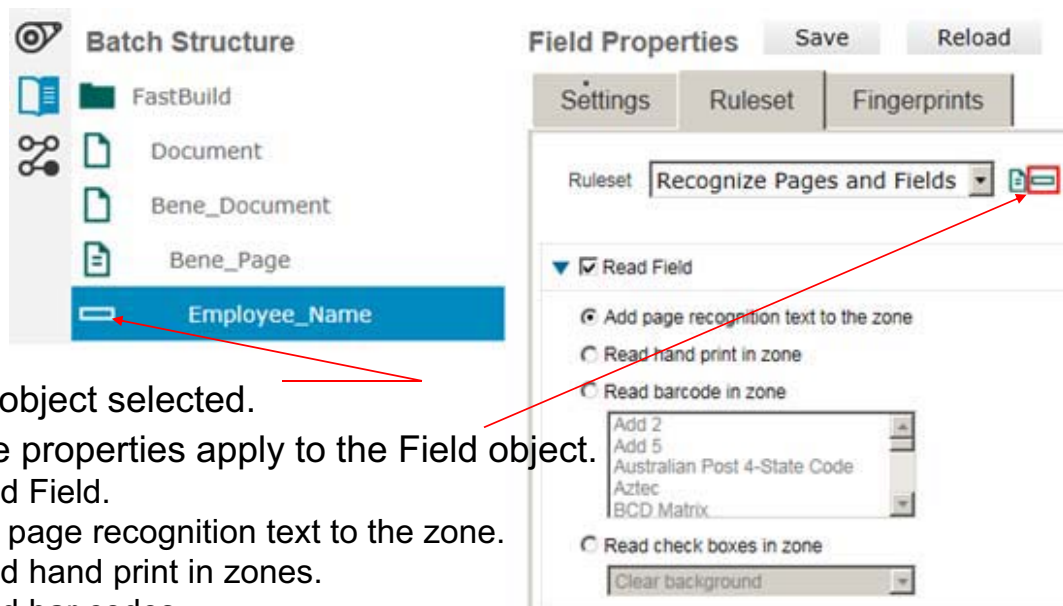
Dictionary

- Define optical marks fields in the OMR group

ADD

- Option to initiate adding OMR items to the dictionary.
- As items are added to the dictionary, the mark object is added to the mark field group.
- Frequency_OMR1 ? One Time
- Frequency_OMR2 ? Monthly
- Frequency_OMR3 ? Quarterly
- Frequency_OMR4 ? Annual

Recognize Pages and Fields ruleset (field object)



- Field object selected.
- These properties apply to the Field object.
 - Read Field.
 - Add page recognition text to the zone.
 - Read hand print in zones.
 - Read bar codes.
 - Read check boxes in zone.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-51. Recognize Pages and Fields ruleset (field object)

F2531.0

Notes:

Field recognition methods are:

- Zonal.
Most reliable and most widely used for forms applications.
- Key word search.
Used the position of a value can be at different places on the image.
Example: the total of a list of purchased item. Position varies depending on the length of the list.
- Regular Expression.
Used to recognize fields with a specific format.
Examples: Social security number xxx-xx-xxxx or a 10 digit phone number xxx-xxx-xxxx

Field Properties

- Read Field

Read field is always required for zonal recognition.

- Add page recognition text to the zone.

Populate the zone with fields read during page recognition.

- Read hand print in zones.

Select this option if the zone has hand printed data.

- Read bar code in zones.

Select this option if the zone has a bar code.

- Read check boxes in zone.

Select this option if the zone has a check boxes.

Zonal recognition engines that are currently used are Abby or ICRC.

Demonstrations

- Configure form template rulesets in FastDoc Server mode



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-52. Demonstrations

F2531.0

Notes:

If you are taking this course as a self-paced virtual class, return to the main course menu to play the pre-recorded demonstrations.

Exercise: Configure form template rulesets

Requires:
Course Exercise Guide
Student system

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-53. Exercise: Configure form template rulesets

F2531.0

Notes:

Exercise objectives

- Configure form template rulesets



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-54. Exercise objectives

F2531.0

Notes:

Lesson 1.5. Define fingerprints and test rulesets

Define fingerprints and test rulesets

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-55. Define fingerprints and test rulesets

F2531.0

Notes:

Lessons

- Introduction to FastDoc Datacap Server mode
- Create an application with Form template
- Create batch structure
- Configure form template rulesets
- ▶ Define fingerprints and test rulesets
 - Populate fields with keyword lookup
 - Configure validate field rulesets
 - Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-56. Lessons

F2531.0

Notes:

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.
- You are required to configure an application in FastDoc after it is created from a template with the Application Wizard. In this lesson, you learn to configure a fingerprint for a page image.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

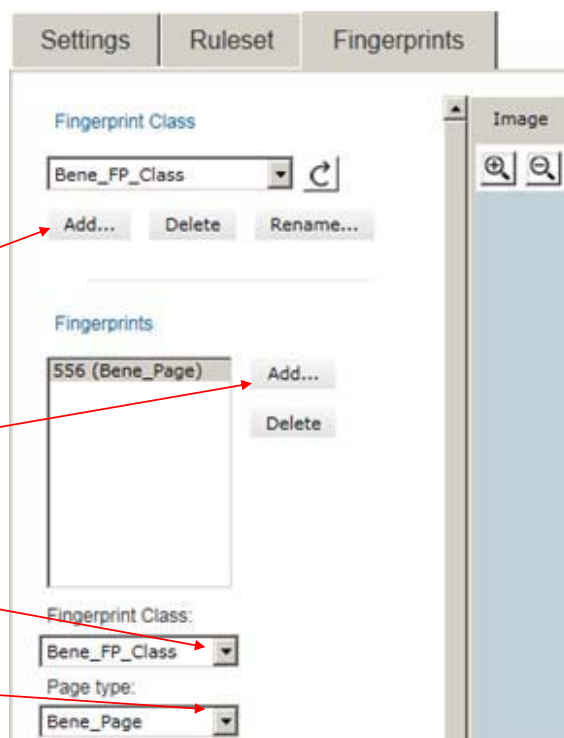
Figure 1-57. Why is this lesson important to you?

F2531.0

Notes:

Fingerprint - Define Fingerprint

- Add Class.
- Add Fingerprint.
- Select a fingerprint class.
- Select a fingerprint page type.



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-58. Fingerprint - Define Fingerprint

F2531.0

Notes:

To configure a Fingerprint for your image

1. Optionally define a fingerprint class with the Fingerprint Class > Add....
If you don't define a class, your fingerprint is added to the New class.
2. Add a fingerprint image to the image pane with Fingerprint > Add.
3. Select a fingerprint class.
4. Select a fingerprint page type.
5. Select each field in the batch structure for the selected page type and use click'n'key to identify the field zones on the image.

Warning: Use Datacap Studio to define check boxes.

Fingerprint – Select Zones

The screenshot shows a 'BENEFICIARY DESIGNATION FORM' with various fields. A red arrow points from the 'Employee Name' field to the 'Zone' selection area. The 'Zone' area displays the following coordinates:

Name:	EmployeeName			
Position:				
Left:	206	Top:	375	
Right:	1010	Bottom:	442	

Below the coordinates is a 'Clear zone' button.

The form fields include:

- Employee Name: Mary Smith
- Social Security No: 245-67-8901
- Date of Birth: 05-11-1966
- Home Telephone Number: 555-234-5678
- Home Address: 2345 Maple Street
- City: Smarter City
- State: NY
- Zip Code: 10026
- Employer: Company A
- Group Number: A12345678
- Irrevocable Beneficiary: Yes No X

5. Select each field with click'n'key
Coordinates are displayed in the Zones area.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-59. Fingerprint – Select Zones

F2531.0

Notes:

To configure a Fingerprint for your image

1. Optionally define a fingerprint class with the Fingerprint Class > Add....
If you don't define a class, your fingerprint is added to the New class.
2. Add a fingerprint image to the image pane with Fingerprint > Add.
3. Select a fingerprint class.
4. Select a fingerprint page type.
5. Select each field in the batch structure for the selected page type and use click'n'key to identify the field zones on the image.

Warning: Use Datacap Studio to define check boxes.

What is design time testing?

- FastDoc's built in ability to test:
 - The page identification to identify the page and document types.
 - Page and field recognition to recognize and extract the data.
- Test Steps (see test procedure in the notes)
 - Read an image.
 - Run the PageID task profile.
 - Run the Profiler task profile.
- Verify results
 - In the Test pane.
 - In the Test batches folder.
- Test batch folder path at the bottom of the Test pane.
 - C:\Users\Administrator\AppData\Local\Temp\1\IBM\Datacap\FastDoc\FastBuild\TestBatch
 - Click Open.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-60. What is design time testing?

F2531.0

Notes:

FastDoc Built-in test interface

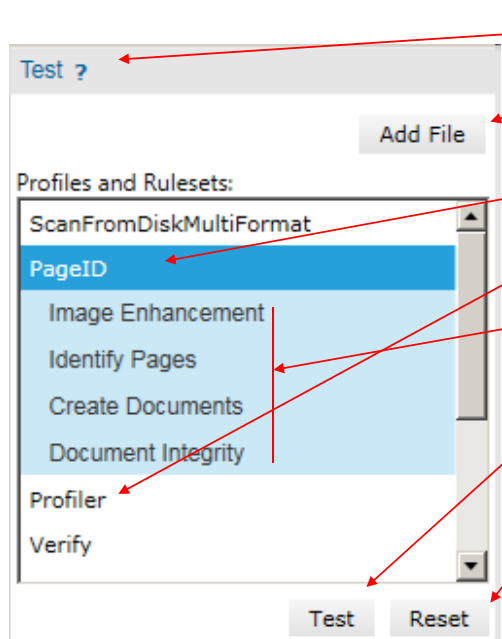
FastDoc c immediately run the PageID and Profiler task to verify that the Fingerprint is correctly defined and the rulesets are correctly configured.

Test procedure

1. Click the Ruleset tab.
2. Add a file c:\DC9-Lab Exervices\FastBuild\Input_SingleTIFFsBene001.tif (Equivalent to VScan step).
3. Select the PageID profile in the test panel Profiles and Rulesets pane. (PageID is the next task after VScan).
4. Verify results:
 - Document type is Bene_Document.
 - Page type is Bene_Page.

- Fingerprint is 556.
- 5. Select the Profile profile.
- 6. Click the Routing ruleset to disable it.
- 7. Click Test.
- 8. Verify the results:
 - Click each field in the Batch Structure pane on the Bene_Page page.
 - Verify that the value is correctly interpreted for each.
 - Verify that the status is Pass for each field.

Test pane profiles and rules



- Test pane on the Ruleset tab.
- Add a file to process.
- Run task profiles.
 - PageID.
 - Profiler.
- Rulesets.
- Test (Run the profile).
- Reset.
 - Clear the image.
 - Flush the batch folder.
 - Clear the history.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-61. Test pane profiles and rules

F2531.0

Notes:

Test page history and results

Test History:
Validate Fields
Recognize Pages and Fields
PageID

Document ID: 1234.01
Type: Bene_Document

Page ID: TM000001
Type: Bene_Page
Status: Pass
Fingerprint: 556

Field ID: Employee_Name
Type: Employee_Name
Value: Mary Smith
Status: Pass
Message:

- Results from the batches folder.
 - Test History.
 - From history.xml file.
 - PageID results.
 - From batch.xml file.
 - D Type.
 - P Type.
 - Status = 0.
 - TemplateID.
 - Profiler results.
 - From tm000001.xml file.
 - F Type.
 - Text value.
 - Status = 0.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-62. Test page history and results

F2531.0

Notes:

history.xml

```
<History>
```

```
<Item>Validate Fields</Item>
```

```
<Item>Recognize Pages and Fields </Item>
```

```
<Item>PageID</Item>
```

```
</History>
```

batch.xml

```
<?xml-stylesheet type="text/xsl" href="..\..\dco.xsl"?>
```

```
<B id="1234">
```

```
<V n="STATUS">0</V>
```

```
<V n="TYPE">FastBuild</V>
```

```
<D id="1234.01">
```

```

<V n="TYPE">Bene_Document</V>
<V n="STATUS">0</V>
<P id="TM000001">
  <V n="TYPE">Bene_Page</V>
  <V n="STATUS">0</V>
  <V n="IMAGEFILE">tm000001.tif</V>
  <V n="processingSettings"></V>
  <V n="OriginalImage">
c:\users\administrator\appdata\local\temp\1\ibm\datacap\fastdoc\fastbuild\testba
tch\ TM000001.tio</V>
  <V n="s_srCreateCCO">1</V>
  <V n="UseOutOfProcessRecog">TRUE</V>
  <V n="Confidence">1</V>
  <V n="Image_Offset">0,0</V>
  <V n="TemplateID">556</V>
  <V n="Fingerprint Created">No</V>
  <V n="DATAFILE">tm000001.xml</V>
  <V n="RecogStatus">0</V>
  <V n="CCOFILE">
c:\users\administrator\appdata\local\temp\1\ibm\datacap\fastdoc\fastbuild\testba
tch\ tm000001c.xml</V>
  <V n="ZoneRead">FPXML</V>
  <V n="ErrorMessage"></V>
</P>
</D>
</B>
tm000001.xml
<?xml-stylesheet type="text/xsl" href="..\..\dco.xsl"?>
<P id="TM000001">
<F id="Employee_Name">
  <V n="TYPE">Employee_Name</V>
  <V n="Position">206,375,1010,442</V>
  <V n="STATUS">0</V>

```

<C cn="10" cr="216,395,247,425">77</C>

<C cn="10" cr="250,402,272,425">97</C>

<C cn="10" cr="273,402,287,425">114</C>

<C cn="10" cr="287,403,307,434">121</C>

<C cn="10" cr="424,394,425,426">32</C>

<C cn="10" cr="321,394,344,426">83</C>

<C cn="10" cr="348,402,378,425">109</C>

<C cn="10" cr="384,395,389,425">105</C>

<C cn="10" cr="391,396,402,425">116</C>

<C cn="10" cr="404,395,424,425">104</C>

</F>

Test pane error resolution

- PageID task.
 - Document and page not correctly identified.
 - Check the fingerprint tab. Make sure Fingerprint 556 is set to Bene_Page type and not the Other type.
- Profiler task.
 - Field value was not read.
 - Make sure the PageID successfully identified the page as a Bene_Page.
 - Check your RuleSet tab and make sure that the settings are correct on the Recognize Pages and Fields ruleset for the Bene_Page and each of the fields.
- Still have a problem?
 - Look at the log files in the batches folder.
 - pageid_rrs.log and _rrs.log.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-63. Test pane error resolution

F2531.0

Notes:

Still have a problem?

- TestBatche folder is at:
C:\Users\Administrator\AppData\Local\Temp\1\IBM\Datacap\FastDoc\FastBuild\TestBatch

Note: At the bottom of the test pane, click Open to get to the TestBatch folder

Demonstrations



- Add a page fingerprint in FastDoc Server mode
- Design time testing of rulesets in FastDoc Server mode

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-64. Demonstrations

F2531.0

Notes:

If you are taking this course as a self-paced virtual class, return to the main course menu to play the pre-recorded demonstrations.

Exercise: Define fingerprints and test rulesets

Requires:
Course Exercise Guide
Student system

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-65. Exercise: Define fingerprints and test rulesets

F2531.0

Notes:

Exercise objectives

- Add a page fingerprint
- Design time testing of rulesets



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-66. Exercise objectives

F2531.0

Notes:

Lesson 1.6. Populate fields with keyword lookup

Populate fields with keyword lookup

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-67. Populate fields with keyword lookup

F2531.0

Notes:

Lessons

- Introduction to FastDoc Datacap Server mode
- Create an application with Form template
- Create batch structure
- Configure form template rulesets
- Define fingerprints and test rulesets
- ▶ Populate fields with keyword lookup
- Configure validate field rulesets
- Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-68. Lessons

F2531.0

Notes:

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.
- You are required to configure an application in FastDoc after it is created from a template with the Application Wizard. In this lesson, you learn to recognize the field and extract the data with the keyword lookup method rather than the zonal recognition.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-69. Why is this lesson important to you?

F2531.0

Notes:

Add the Locate Fields Using Keyword ruleset

- On the FastDoc Configure workflow view.
- Add the Populate Fields Using Keywords ruleset to the Profiler task profile.

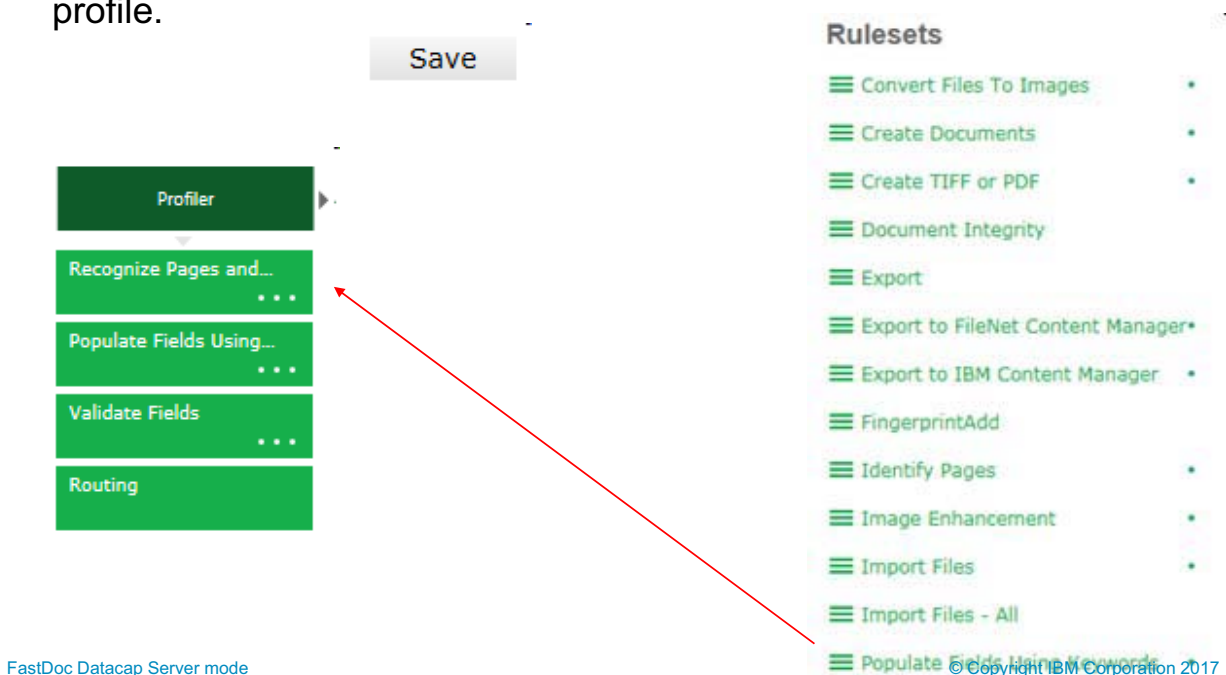


Figure 1-70. Add the Locate Fields Using Keyword ruleset

F2531.0

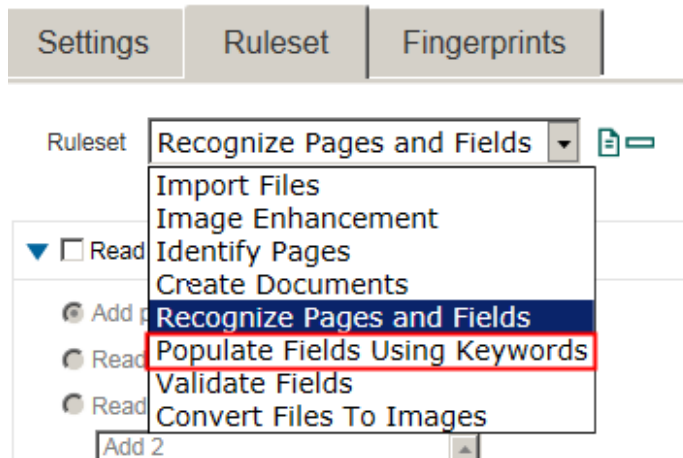
Notes:

Add the Populate Fields Using Keywords ruleset:

- The Rulesets column on the right pane contains all of the global rulesets from the Datacap\RRS folder.
- Drag the “Populate Field Using Keywords” ruleset from the Rulesets column to the Profiler task profile.
- Place the “Populate Field Using Keywords” ruleset after the “Recognize Pages and Fields” ruleset.
- Use the Save control to save your changes.

Configure Populate Fields Using Keyword ruleset

- On the Configure documents, pages, and fields view.
- Select the Field in the Batch Structure pane.
- On the Ruleset tab, select the Populate Fields Using Keywords.



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-71. Configure Populate Fields Using Keyword ruleset

F2531.0

Notes:

Select population methods

Settings Ruleset Fingerprints

Ruleset Populate Fields Using Keywords

Field Information

The field Date_Signed will be located.

Select the method to use to populate the field from full page recognition:

- ☐ Populate from the zone only
- ☒ Locate by keyword only
- ☐ Populate from the zone when it exists. Otherwise use locate by keyword
- ☐ Locate by keyword when it exists. Otherwise use populate from the zone

- Always set the Field information check box.
- Select populate option.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-72. Select population methods

F2531.0

Notes:

- Always set the Field information check box.
 - If not set then no field population is done.
- Population options are:
 - Use zone.
 - Use keyword search.
 - Use a prioritized combination of both options to ensure reliable field recognition.

Locate the lookup term

- Sample search label and value.

Date Signed 08-31-2012

- Click Add Term.
 - Type the label to search for.
- Select search options.

Enter the terms to locate:

LocateTerm

Date Signed

Add Term

Select the search type:

- ☒ Locate terms allowing for common recognition errors
☐ Locate terms using regular expression syntax

Select to locate the first occurrence or last occurrence on the page:

- ☐ Locate first occurrence
☒ Locate last occurrence

Select the order of the search terms:

- ☒ Search for terms in sequential order
☐ Search for all of the terms at the same time

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-73. Locate the lookup term

F2531.0

Notes:

Add Term

- You can add more than one term to search for. When you are searching for a total value, possible key words to search for might be:

Examples:

Total

Total:

Total Sale

Total Sale:

Sum

If any of these terms are found on the page, then the subsequent directions are followed to locate the value.

Select Search options

- Select the search type.
 - Locate terms and allow for common recognition errors.

This option does a normal test search.
 - Locate terms by using regular expressions syntax.

This option uses regular expression to search for patterns or specific characters or character ranges.
- Select to locate the first occurrence or last occurrence on the page:
 - Locate first occurrence.

This option results in a search from the top of the page to locate the first occurrence.
 - Locate last occurrence.

This option results in a search from the bottom of the page to locate the first occurrence.
- Select the order of the search terms:
 - Search for the terms sequentially

This option searches the entire document for each defined term sequentially.
 - Search for all of the terms at the same time.

This option checks each term for each test field on the page and ends when the first term is found.

:

Locate value with direction and grouping

- Select direction options
- Select grouping options
 - See notes for option descriptions

Specify movement to the desired word starting from the located word:

Direction: Count:

Specify grouping of words to include in the found field:

Group direction:

Group spacing count:

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-74. Locate value with direction and grouping

F2531.0

Notes:

Add Locate Movement

- Direction options.
 - Move down a line.
 - Move to next word.
 - Move to previous word.
 - Move up a line.
- Direction count.
 - Specify the number of lines to move up or down or the number of words to move left or right.
- Group directions options.
 - Group leading and trailing word.
 - Group leading words.

- Group trailing words.
- No grouping.

Examples:

For the Employee name, you select "group trailing words" to make sure that the employee first and surnames were read.

Therefore, for the Date Signed field no grouping is required because the date consists of contiguous characters, 08-31-2012 and interpreted as one word.

- Group spacing count.
 - The number of words that separate the words that should be considered the same word.

Exercise: Populate fields with keyword lookup

Requires:
Course Exercise Guide
Student system

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-75. Exercise: Populate fields with keyword lookup

F2531.0

Notes:

Exercise objectives

- Populate fields with keyword lookup



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-76. Exercise objectives

F2531.0

Notes:

Lesson 1.7. Configure validate field rulesets

Configure validate field rulesets

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-77. Configure validate field rulesets

F2531.0

Notes:

Lessons

- Introduction to FastDoc Datacap Server mode
- Create an application with Form template
- Create batch structure
- Configure form template rulesets
- Define fingerprints and test rulesets
- Populate fields with keyword lookup
- ▶ Configure validate field rulesets
- Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-78. Lessons

F2531.0

Notes:

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. The preferred way of creating new application is with FastDoc rapid application builder capabilities.
- You are required to configure an application in FastDoc after it is created from a template with the Application Wizard. In this lesson, you learn to configure validation rules to establish the validity of fields that are extracted from the image.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-79. Why is this lesson important to you?

F2531.0

Notes:

Validate Fields ruleset

- Validate Selected fields.
- Validate this field, <field name>.
 - Must be set for any validation to take place.
- Skip validation if the field if the field is empty.
- Each enabled validation section is evaluated in order.
- Validation check groups.
 - Common.
 - Length.
 - Value Content.
 - Date.
 - Currency and numeric.
 - Lookup.
 - Custom Error Message.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-80. Validate Fields ruleset

F2531.0

Notes:

The Validate Fields ruleset is a compiled (UI) ruleset that provides a wide range of field validation options for the selected value. If the required degree of validation cannot be accomplished with these validation options, then you must use Datacap Studio to create a conventional ruleset from the validate action libraries. The use of Datacap for creating specialized rulesets is covered in a later class.

Common ruleset options

- Common.
 - Overridable. (**default** option in Form template)
 - Trim spaces.
 - Covert characters options:
 - No change (**default** option in Form template)
 - To lowercase.
 - Convert to uppercase.
 - Allow only characters.
 - Filter strings.
 - Replace.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-81. Common ruleset options

F2531.0

Notes:

Common

Sets up the validation characteristics for the captured values of the current field.

- Overridable. (**default** option in Form template)

The verify operator can override the recognized value.
- Trim spaces

Delete spaces at the beginning and end of the captures value.
- Covert characters options:
 - No change – Do not change the case of the captured field value.
 - To lowercase - Convert to lowercase.
 - To uppercase case - Convert to uppercase.
- Allow only characters.
 - You specify the list of allowable character.

- All others characters are eliminated.
- Filter strings.
 - You specify the list of characters that must be removed.
- Replace.
 - Replace one text string with another.

Length & Value Content ruleset options

- Length.
 - Validate the number of characters or identified OMR boxes, such as check boxes, in the captured value of the current field.
 - Minimum of one character (**default** option for Form template).
- Value Content.
 - You provide an exact match value, a Partial Match value, or a Regular expression match value against which the recognized value is compared.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-82. Length & Value Content ruleset options

F2531.0

Notes:

Length

- Validate the number of characters or identified OMR boxes, such as check boxes, in the captured value of the current field.

Minimum of one character (**default** option for Form template).

- Minimum: Specify the minimum character length of the current field value.
- Maximum: Specify the maximum character length of the current field value.
- Minimum OMR: Specify the minimum number of identified OMR boxes to validate.
- Maximum OMR: Specify the maximum number of identified OMR boxes to validate.

Value Content

- Validate that the value of the parameter that was entered matches the captured value of the current field.
- You provide comparison parameter options:

- Exact match value.
- Partial Match value.
- Regular expression match value against which the recognized value is compared.

Date ruleset options

- Date.
 - Check date format.
 - Any valid date.
 - Range of dates.
 - Within # of days.
 - Reformat.
Examples: yyyy-mm-dd or mm/dd/yy

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-83. Date ruleset options

F2531.0

Notes:

Date Ruleset Options

Validate that the captured value of the current field has an acceptable date format.

- Check date format.
 - Range of dates.
 - Check that the date is within the Range start and Range finish dates. (Use “Date start” and “Date finish” parameters)
 - Within # of days.
 - Check that the captured date lies within the “Number of days” value before or after the current date. (Use “Number of Days” property)
 - Reformat.
 - You provide a new format that you want the date value to be converted to.

Currency & Numeric ruleset options

- Currency and numeric.
 - Sum name.
 - Percent numeric.
 - Currency format check box.
 - Less than or equal to.
 - Greater than or equal to.
 - Calculate.
 - Specify a formula for calculating the field value.

Calculate:

Examples:

```
'SubTotal' + 'Shipping' + 'Tax' = 'Total'
```

```
('SubTotal' + 'Shipping' + 'Tax') - '0.05' = 'Total'
```

```
('Wages' + 'Interest' + 'Unemployment') >= ('Gross' - '.05')
```

```
('Wages' + 'Interest' + 'Unemployment') <= ('Gross' + '.05')
```

Home Address Field

2 Decimals ☐ Propagate failure to all fields

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-84. Currency & Numeric ruleset options

F2531.0

Notes:

Currency and numeric

Validate whether the captured value of the current field meets the currency format of the current locale.

- Sum name.

The name to use to locate the field or variable to sum the children of the current variable.
- Percent numeric.

Check that the characters in the captured value are n% numeric.
- Currency format check box.

Check whether the value meets the currency format specification for the locale.
- Less than or equal to.

The maximum value that is allowed for the field.

- Greater than or equal to.

The minimum value that is allowed for the field.

- Calculate.

Calculate the equation that is entered as a parameter and compares the result to the captured value of the current field object.

- Specify a formula for calculating the field value.

Lookup ruleset options

- Lookup.
 - Database.
 - Select the database to use for lookup.
 - SQL statement.
 - Look up the value to compare the field value against.
 - Populate fields from values returned from a database lookup.
 - Populate field check box.
 - This option specifies that you populate the field with the value from the database.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-85. Lookup ruleset options

F2531.0

Notes:

Lookup

Validate the current field value by allowing it to be used in a database query, optionally populating fields with lookup.

- Database: Select the database to use for lookup
- SQL statement

Look up the value to compare the field value against.

Example: validate that a zip code really exists by looking it up in a database.

Populate fields from values returned from a database lookup.

Example: Populate the City and State fields based on the parameters returned from a zip code lookup operation.

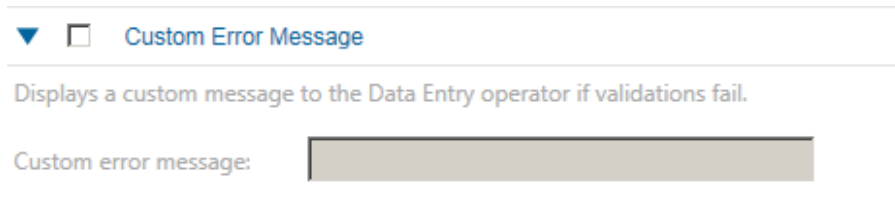
- Populate field check box

This option specifies that you populate the field with the value from the database.

Custom Error Message ruleset options

Display a custom message to the operator if the validation fails.

- Custom Error Message.



The screenshot shows a configuration window for 'Custom Error Message'. It features a dropdown arrow and a checkbox. Below the checkbox is a description: 'Displays a custom message to the Data Entry operator if validations fail.' At the bottom, there is a label 'Custom error message:' followed by a text input field.

Notes:

Exercise: Configure validate fields ruleset

Requires:
Course Exercise Guide
Student system

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-87. Exercise: Configure validate fields ruleset

F2531.0

Notes:

Exercise objectives

- Configure validate field rulesets
- Configure a new page fingerprint



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-88. Exercise objectives

F2531.0

Notes:

Lesson 1.8. Export to IBM FileNet Content Manager

Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-89. Export to IBM FileNet Content Manager

F2531.0

Notes:

Lessons

- Introduction to FastDoc Datacap Server mode
- Create an application with Form template
- Create batch structure
- Configure form template rulesets
- Define fingerprints and test rulesets
- Populate fields with keyword lookup
- Configure validate field rulesets
- ▶ Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-90. Lessons

F2531.0

Notes:

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system.
- This lesson describes how to configure the Form rulesets to export to an IBM FileNet Content Manager repository.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-91. Why is this lesson important to you?

F2531.0

Notes:

Delivery options

- What does Export mean?
 - When Capture processing is complete, send documents and index parameters to a data repository or the next business process.
- Content Management Systems.
 - IBM Content Managers.
 - Third-Party Content Managers.
 - All CMIS compatible systems.
 - (See notes for details)
- Business-specific export options.
 - LOB applications.
 - Case and Business Process Management Workflows.
 - Databases and Electronic Data Interchange services.
 - (See notes for details)

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-92. Delivery options

F2531.0

Notes:

IBM Content Management Systems

- IBM FileNet Content Manager
Use the FileNet P8 actions to export data to a FileNet Content Manager repository.
- IBM Content Manager
Use the IBMCM actions to upload documents into an IBM Content Manager repository.
- IBM Content Manager OnDemand (CMOD)
You can configure Datacap to export index data and files into Content Manager OnDemand.
- IBM FileNet IDM Export
Use the FileNetIDM actions to upload documents into an FileNet Image Services library.

- IBM Navigator on Cloud

Third-party Content Manager

- Microsoft SharePoint

Use the SPExport actions to upload documents to a Microsoft SharePoint library.

- Any CMIS repository

Content Management Interoperability Services (IBM CMIS) is an open standard.

Use the CMISClient actions to communicate with compliant content management systems over the internet.

Business-specific export options

- Line of Business (LOB) applications
- Case Based Applications
- Business Process Management solutions
- Electronic Data Interchange (EDI).

Other export options.

- Relational Databases

Use the ExportDB actions to set up and write information to an export database.

- XML Export

Datacap can export data to an XML file by using the actions in the ExportXML action library.

The ExportXML library includes actions that you can use to write data to an XML file.

- Local or network text file

Export configuration options

- FastDoc built-in Export Support:
 - Form and Learning template options:
 - A local text file with the Export ruleset. (Default)
 - IBM Content Manager with the “Export to IBM Content Manager” ruleset.
 - IBM FileNet Content Manager with the “Export to IBM FileNet Content Manager” ruleset.
- Export rulesets that are built with Datacap Studio from action libraries.
 - ExportDB action library exports to a connected database.
 - ExportXML action library exports as XML files.
 - CMISClient action library exports to CMIS compatible systems.
 - SPExport action library exports to Microsoft Share Point Manager.
 - FileNetIDM action library exports to FileNet Image Services Repository.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-93. Export configuration options

F2531.0

Notes:

FastDoc built-in Export Support

There are four Export related Rulesets that are defined in Datacap that are used and are configurable with Ruleset UI from The FastDoc administrator interface.

- Export ruleset - Conventional ruleset that is configured to export text parameters to the application export folder.

Default Export configuration that is implemented in the Form and Learning templates is:

- Export to a local text file with the Export Ruleset.
- Use the Export actions to set up and write information to an export text file on the local system.
- The Export actions can set up line item values, batch, document, and page variables, path locations, before exporting the information.

- ExportAllFields action writes a comma-separated list of all index values to the text file.

Sample Text Output from the ExportAllFields action:

*,Mary Smith,245-67-8901,05-11-1966,Company A,,A12345678,2345 Maple Street,Smarter City,NY,10026
,Jose Flores,567-55-3456,06-05-1955,Company C,,C34567890,3434 Cypress Road,Smarter City,NY,10026*

- PreExport Compiled (UI) ruleset to convert output image to TIFF or PDF format.
- “Export to IBM Content Manager” Compiled (UI) ruleset to configure export to IBM Content Manager.
- “Export to IBM FileNet Content Manager” Compiled (UI) ruleset to configure export to IBM FileNet Content Manager.

Datacap Studio builds rulesets from action libraries.

- ExportDB action library exports to a connected database.
- ExportXML action library exports as XML files.

Use the ExportXML actions to set up and write information to an export XML file.

- CMISClient action library exports to CMIS compatible systems.
- SPExport action library exports to Microsoft Share Point Manager.
- FileNetIDM action library exports to FileNet Image Services Repository.

General export action

- In General each of the export action libraries mentioned in the previous slides, all have actions to do the following operations.
- Export actions:
 - Set up document attributes.
 - Build the record in memory.
 - Create folders and documents or data records.
 - Locate or open a connection to the file, database, repository, or business-specific process.
 - Authenticate with the destination server.
 - Upload documents to the server for storage or more processing.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-94. General export action

F2531.0

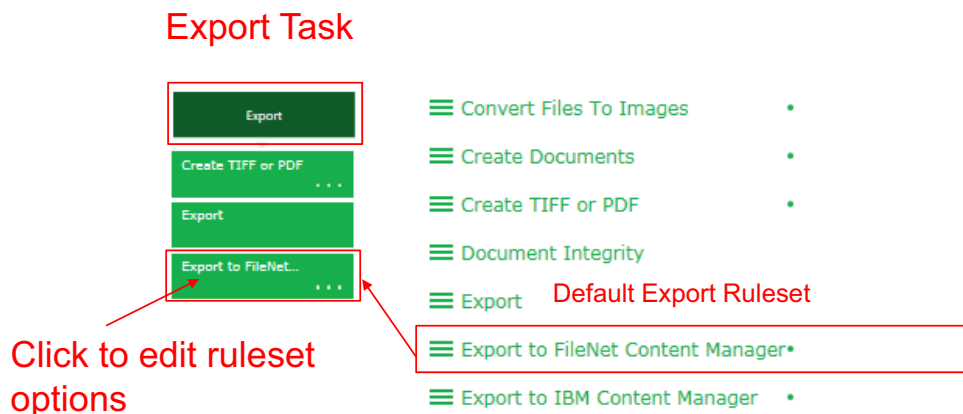
Notes:

Help Path:

- Datacap > Datacap 9.0.1 > Reference > Action library summaries > Global actions
http://www.ibm.com/support/knowledgecenter/SSZR WV_9.0.1/com.ibm.dc.develop.doc/dcadg702.htm?lang=en

Select a Ruleset

- Form and Learning template options:
 - A local text file with the Export ruleset. (Default)
 - IBM FileNet Content Manager with the “Export to FileNet Content Manager” ruleset.
 - IBM Content Manager with the “Export to IBM Content Manager” ruleset.



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-95. Select a Ruleset

F2531.0

Notes:

The image on the slide shows the Export task and the Ruleset list from the Configure Workflow view of the FastDoc Admin interface.

- In the exercise for this Lesson, you configure the Export to FileNet Content Manager ruleset.
- Copy the Export to IBM Content Manager ruleset into the Export Task.
- Normally you would remove the Export ruleset, which writes index parameters to a text file but it is also OK to leave it in while you are debugging the application. Remove it before the application is released for production.
- The three dots in the lower right corner of the ruleset box, indicates that the ruleset is a compiled UI ruleset. This identification means that it has parameters that can be configured with FastDoc

Configure the Batch parameters

- Export to FileNet Content Manager ruleset has three levels of parameters to configure:

- Batch level
- Document level
- Field level

Ruleset: **Export to FileNet Content Manager**

FastBuild

- Document
- Bene_Document
- Other

Batch Information

FileNet Content Manager URL:*

User ID:*

Password:*

Confirm password:*

Locale:

Storage object id:*

Parent folder:

Subfolder to create for batch:

Number of upload attempts:

Upload timeout:

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-96. Configure the Batch parameters

F2531.0

Notes:

The image on the slide shows one image that indicates that the Export to FileNet Content Manager ruleset has three levels of configuration option. The second image shows the configurable options for the batch level parameters.

- The following parameters are Custom Values and must be configured in the Datacap Application Manager.
 - FileNet Content Manager URL - FileNetURL
 - User ID* - FileNetUserID
 - Password – FileNet Password
- Storage object ID: defines the Repository name.
- Parent Folder: defines the folder name within the repository.
- Subfolder to create for batch: defines a subfolder that can be provided for each batch.

Configure the Document parameters

- The upload file name must match the document ID.
- Document class ID must match the repository DocClass.
- Document file extension tif is assumed unless overridden here.
- See notes comment about Add Rows

The screenshot shows the 'FastDoc Datacap Server mode' interface. On the left, a sidebar lists 'FastBuild', 'Document', 'Bene_Document' (selected), 'Bene_Page', and 'Other'. The main area is titled 'Document Information' and contains the following fields:

- Document title: * @ID
- Document class ID: * BeneForm
- Document file extension: pdf

Below these fields is a section for 'Document properties' with a table structure:

Symbolic name	Value	Type	Multi
<div>Add Row</div>			

At the bottom right, there is a copyright notice: © Copyright IBM Corporation 2017.

Figure 1-97. Configure the Document parameters

F2531.0

Notes:

The image on the slide shows the configurable options for the document level parameters.

Document title:

- The FNP8_Upload action requires that the upload file names match the document ID.
- The file name must match @ID.pdf or @ID.tif, where @ID is the ID of the document level.
- The document file for export must exist before calling the FileNet export actions.

Document class ID:

- All index parameters must be matched to the properties defined in the IBM FileNet Content Manager document class ID defined here.
- If Index parameter names do not match Document class property names then, they must be mapped to the property symbolic name.

Document file extension:

- This field is used to append to the document name to match the name of the document that must be uploaded.
- If the field is blank, then TIF is assumed

Document properties: Add Row control

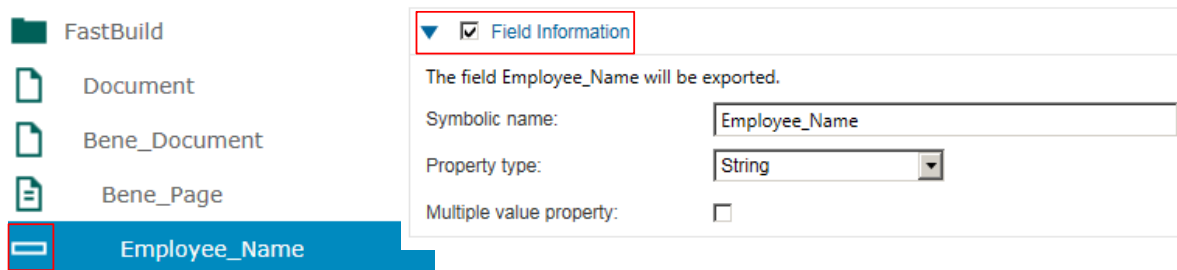
- The document level option is useful for exporting document variables, which are document level metadata.
- Document variable values come from various sources:
 - Data that is entered by an operator when the entire batch was scanned.
 - Data that persists from document to document and many others.
- The syntax for referring to page level parameters is as follows.

@D\myPageType\myFieldType

Note: It is not recommended that you define page level parameters for export at the document level by using the Add Row control. The preferred method is to define the parameter for export at the field level. See the next slide.

Configure the Field parameters

- This is the preferred method of exporting page parameters.
 - Click the Field Information check box to enable export for the field.
 - The Symbolic name must match the Document Class Symbolic Name.
 - The property type must match the Document Class property type.
 - Multi-value property is used to identify array type properties.



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-98. Configure the Field parameters

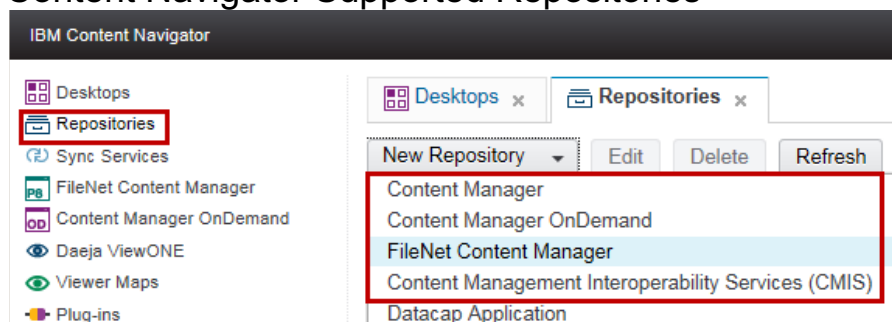
F2531.0

Notes:

The image on the slide shows the configurable options for the Field level parameters.

View IBM Repositories with Datacap Navigator

- IBM Content Navigator Supported Repositories



- <http://<navigator server name>:9080/navigator > Repositories>
- Configure Repository access.
 - For visibility into the supported repositories.
- Configure Datacap application access.
 - For Navigator process, and monitor control of Datacap applications.

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-99. View IBM Repositories with Datacap Navigator

F2531.0

Notes:

The image on the slide shows the supported repository types in the New Repository selection list.

To configure access to a repository from IBM Content Navigator (ICN):

1. Open a Browser window and browse to <http://<navigator server name>:9080/navigator>.
<navigator server name> = ecmedu01 for the class image.
2. Log in as navigator administrator. (p8admin/IBMFileNetP8) for class image.
3. Click the Repositories option in the left side toolbar.
4. Click New Repository.

Configure Repository access

The supported repositories are:

- Content Manager – IBM Content Manager (CM8)
- Content Manager On Demand – CMOD

- FileNet Content Manager – IBM FileNet Content Manager (P8)
- Content Manager Interoperability Services (CMIS)

Configure Datacap application access

- Datacap Application
 - Each application that Datacap Navigator controls must be defined by using the Datacap Application option on the repositories view.
 - You must connect to the repository before you configure parameters, system Properties, Folders, and so on.

IBM FileNet repository configuration parameters

- IBM FileNet Content Manager repository configuration parameters.

FileNet Content Manager repository: **DCExport**

General Configuration Parameters System Properties Browse Search

You must connect to the repository before you configure parameters, system properties, folders, and so on.

* Display name: ? DCExport

* ID: ? DCExport

* Protocol: EJB

* Server URL: ? iiop://ecmedu01:2809/FileNet/Engine

* Object store symbolic name: ? DCExport

* Object store display name: ? DCExport

Connect...

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-100. IBM FileNet repository configuration parameters

F2531.0

Notes:

The image on the slide shows the required parameters for configuring a connection to an IBM FileNet Content Manager repository.

Parameters are:

- Display name: DCExport
- Server URL: iiop://ecmedu01:2809/FileNet/Engine
- Object store symbolic name: DC Export
- Object store display name: DC Export

View Exported objects in the repository

- Use the Datacap Navigator desktop to view export objects in the IBM FileNet Content Manager repository.

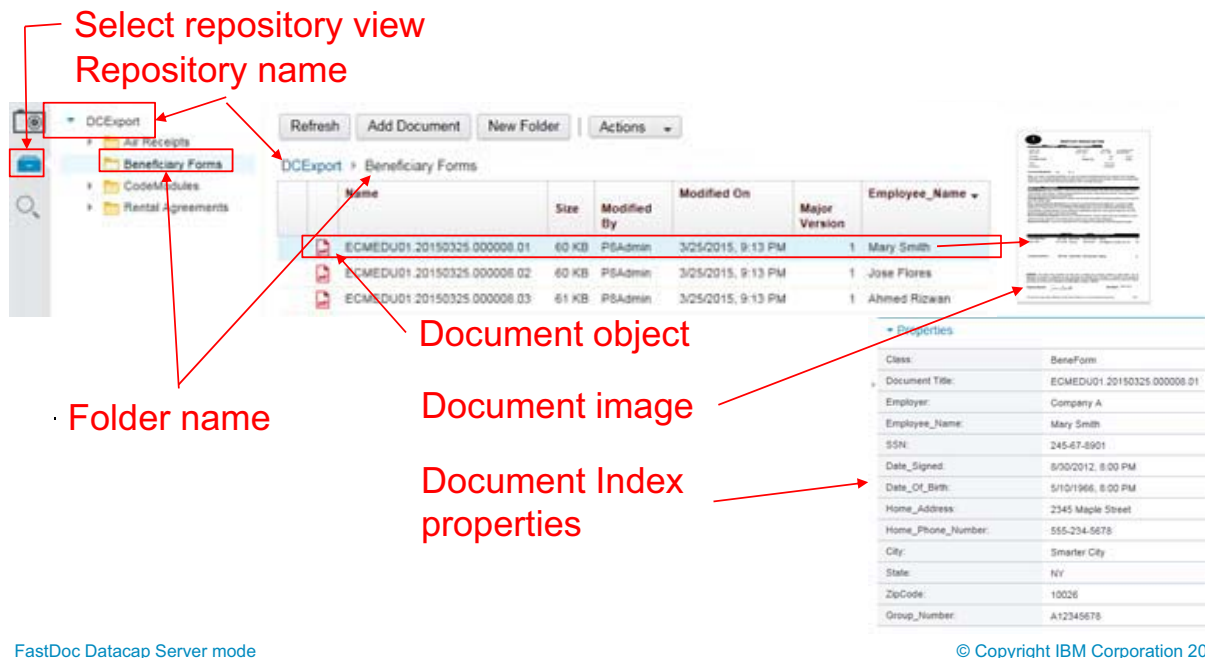


Figure 1-101. View Exported objects in the repository

F2531.0

Notes:

The image on the slide shows the view of an IBM FileNet Content Manager repository.

You use the Datacap Navigator desktop to view the repositories.

- Open a Browser window and browse to `http://<navigator server name>:9080/navigator/?datacap&metaie=10`.
`<navigator server name>` = `ecmedu01` for the class image.
- Log in as navigator administrator. (admin/admin) for class image.
- Click the Repositories option in the left side toolbar.
- Double-click the folder used Datacap export. For this lesson Beneficiary Forms

Demonstrations

- Export to IBM FileNet Content Manager



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-102. Demonstrations

F2531.0

Notes:

If you are taking this course as a self-paced virtual class, return to the main course menu to play the pre-recorded demonstrations.

Exercise: Export to IBM FileNet Content Manager

Requires:
Course Exercise Guide
Student system

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-103. Exercise: Export to IBM FileNet Content Manager

F2531.0

Notes:

Exercise objectives

- Export to IBM FileNet Content Manager



FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-104. Exercise objectives

F2531.0

Notes:

Unit summary

- Create an application with Form template
- Create batch structure
- Configure form template rulesets
- Define fingerprints and test rulesets
- Populate fields with keyword lookup
- Configure validate field rulesets
- Export to IBM FileNet Content Manager

FastDoc Datacap Server mode

© Copyright IBM Corporation 2017

Figure 1-105. Unit summary

F2531.0

Notes:



IBM Training

