Course Exercises Guide

IBM Datacap 9.0.1: FastDoc Multi-Page Document

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Unit . Add a Multi-Page Document

Estimated time

03:00 Hours

Unit overview

This unit contains these lessons.

Lessons

Lesson .1, "Create a multi-page form application," on page -3

Lesson .2, "Recognize with ICR and OMR," on page -15

Lesson .3, "Validate with database lookup," on page -22

Unit dependencies

The activities in this unit must be done in the provided order.

Requirements

The activities in this unit assume that you have access to the student system configured for these activities.

Do this first

1. If you are prompted to log in to the system, use:

Type	User ID	Password
Operating system	Administrator	passw0rd

2. Start the Datacap Server.
   a. Click Start > All Programs > IBM Datacap Services > Datacap Server Manager.

   The Datacap Server Manager window is shown.

   a. Click the Service tab.
   b. Click Start to start the The Datacap Taskmaster Server Service if it is not already started. The Start operation is disabled if it is already started.
   c. Click close to close the Datacap Taskmaster Server Manager window.

3. Start WebSphere Application Server.
   a. Double-click the WebSphere Admin folder on the Desktop.
   b. Double-click the Start Server1.bat script file.

      This action starts the IBM FileNet Content Manager, and the Content Navigator.

System check

The activities in this unit assume that all system services are running when you begin an activity session. Perform a system check whenever you start a IBM FileNet Content Manage system or start working on a system that is in an unknown state.

1. Go to the Content Navigator Ping page to verify that the IBM FileNet Content Management services are started. This page displays the version information for Content Navigator and the operating system.

   URL: http://ecmedu01:9080/navigator/Ping
2. Log in to Datacap Studio as admin/admin to verify that the Datacap Server is active and connected.
   a. Double-click the Datacap Studio icon on the desktop.
3. See Appendix B for procedures to Start, Check, and Restart components on the student system.

End of exercise

Lesson .1. Create a multi-page form application

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap Capture system and communicate solution details to the solution architect, administrator, and users.

To configure most Datacap capture applications, you must know how to configure a document with multiple pages. The page images that you use in the class are rigid forms and therefore they are best processed with Form Template based application. Also, important is configuring Recognition rulesets for ICR (Intelligent Character Recognition) for handwriting and OMR (Optical Mark Recognition) for check boxes.

Activities

- Exercise 1: Create a Form Template based Application, on page -4
- Exercise 2: Add a second page, on page -12

User accounts

Type	User ID	Password
Operating System	Administrator	passw0rd
Datacap	admin	admin

Note

Passwords are always case-sensitive.

Exercise 1: Create a Form Template based Application

Introduction

This activity gives you a familiarity with the requirements for processing a document with multiple pages. You will first create a FastDoc application by using the Forms template and then configure it to recognize and process a multi-page document.

The last thing you will do is configure a database of zip codes that you will use to do a database lookup. If you find a match, you will display the database City and State for the user. If you don't find a match, you will display the Value of the ICR'd City and State fields on the form.

Procedures

Procedure 1, "Create and configure an application," on page -4

Procedure 2, "Configure a document type," on page -5

Procedure 3, "Configure rulesets," on page -6

Procedure 4, ": Add a fingerprint for the first page of HRF_Document," on page -9

Procedure 5, "Identify the master image file.," on page -11

Procedure 6, "Review the Output," on page -11

Procedure 1: Create and configure an application

Use the Application Wizard to create an application by using the Form Template and name the application HRF_Form.

1. Start the FastDoc Admin interface and log in to the Local mode.
   a. Double-click the Datacap FastDoc (Admin) icon on the Desktop.
   b. Click Local.
   c. Click Login.
2. Create the application.
   a. Click the Datacap Application Wizard  icon on the right side of the header bar and click Next.
   b. Click "Create a new RRS application" and click Next.
   c. Type the application name "HRF_Form".
   d. Select the Form Template, and click Finish.
   e. Verify that no errors or warnings are shown on the Summary window and click close.
3. Log out of FastDoc Local mode.
4. Check application paths for the new "HRF_Form" application.
   a. Open the Datacap Application Manager. Double click the icon on the desktop.
   b. Select the "HRF_Form" application in the navigation panel on the left.

c. On the Main tab, make sure that none of the paths are still pointing at the template folder. They should all be pointing at C:\Datacap\HRF_Form and not C:\Datacap\Template\HRF_Form. If any paths are incorrect, then correct them (especially the Database connection strings).

d. Close the Datacap Application manager.

Procedure 2: Configure a document type

1. Log in to FastDoc (Admin) in the Datacap Server mode.
   a. Select HRF_Form from the Application list.
   b. Type Password: admin.
   c. Click Login.
2. Add Document Type.
   a. Click the icon for Configuring Documents, pages, and fields  .
   b. In the Batch Structure Pane, select HRF_Form.
   c. Click Add Document… to add a Document Type.
   d. Name the Document type HRF_Document.
   e. Click the "Use rulesets from" check box to enable the option.
   f. Select Document.
   g. Click Add to add this document type.
3. Add the first of two Page Types.
   a. Select HRF_Document in the Batch Structure pane and click Add Page.
   b. Name the page HRF_Page.
   c. Click the "Use rulesets from" check box to enable the option.
   d. Select Page.
   e. Click Add to add this page type.
4. Set the Document Integrity Rule.
   a. In the Batch Structure Pane, select the HRF_Page.
   b. Type the following Values to enforce the requirement that there be only one HRF_Page and it is always the first page of the document.

      Minimum: 1
      Maximum: 1
      Order: 1

   c. Click Save.
5. Add Fields to the new page type.
   a. Click the HRF_Page in the Batch Structure pane.
   b. Click Add Field.

c. Type one of the following names in for Field type.

   Zip
   City
   State
   Frequency

d. Click Add after you 've typed in the name.

e. Repeat steps 5.b - 5.d for each field.

Procedure 3: Configure rulesets

Implement basic ICR recognition of the HRF_Page and the Zip code, City, and State fields of the HRF page. Also, configure Frequency to read both the field and check boxes in the zone.

1. Configure ICR recognition of the HRF_Page and fields.
   a. Select the HRF_Page in the Batch Structure.
   b. Click the Ruleset tab.
   c. Select the Ruleset 'Recognize Pages and Fields'.
   d. Check the following options:

      Enable: Read Page
      Enable: Load Zones for Fields

2. Configure the fields
   a. Select the field Zip on the HRF_Page under the Batch Structure.
   b. Select the Ruleset 'Recognize Pages and Fields'.

      Enable: Read Field
      Enable: Read hand print in zone.

   c. Repeat steps 2a and 2b for the City and State fields.
   d. Select the Frequency field.

      Enable: Read Field
      Enable: Read Check Boxes in Zone

   e. Select ‘Clear background’ from the ‘Read check boxes’ in zone field.
3. Click Save to preserve your configuration.
4. Continue the Frequency field configuration.
   a. Click the Settings tab.
   b. Click the Frequency field under the Batch Structure.
   c. Click the ‘Optical mark’ Enable check box.

Note

Define a choice list with the four Frequencies with the values in the Choice List parameter table. You do the zoning of the Frequency field and the four OMR boxes in Lesson 3.2.

Notice at the bottom of the settings interface for the Frequency field, there is an area where you can define a dictionary table with two columns:

- Value
- Display Text.

d. Click Add four times.

e. Type the four values and Display Text entries from the table.

Choice List parameters

Value	Display Text
1	One Time
12	Monthly
4	Quarterly
2	Annually (this year and next)

These choices populate a choice list in the verify panel interface.

5. Click Save to preserve your configuration.
6. Configure the Image Enhancement ruleset.
   a. Click the HRF_Page object in the Batch Structure pane.
   b. Click the Ruleset tab.
   c. Select the Image Enhancement ruleset.
   d. Click the dark gray vertical bar between the Ruleset pane and Test pane to maximize the area to view the images.
   e. Click ‘Open image file ...’ under the ‘Image operations’ heading.
   f. Go to C:\DC9-Lab Exercises\HRF_Form\HR and select any one of the Sample Image pages and click open.
   g. The image is displayed in the two image view panes to the right of the Image Enhancement options.

Note

You already had some exposure to Image Enhancement in an earlier lesson when you were configuring the learning templates. There are many improvements in this ruleset compared

to the Datacap 8.1 version. It is important that you configure and run image enhancement to improve the quality of your pages before they are fingerprinted.

Before you start:

Use your mouse wheel to zoom in on the image and click and drag the image to focus on the specific area where you expect change to happen as you adjust the image enhancement options.

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h. Experiment with the settings while you observe the instant changes to the image in the right side image pane. Choose settings that are likely to result in the most readable image.

   Examples:

   - Click the Remove Lines rule, change the parameters, and observe the results. Make some changes to the parameters and see what affect it has.
   - Click the Deskew rule and test various parameters. Deskew is one of the most important image enhancement capabilities that directly affects fingerprint matching, so become familiar with the options that are available to configure it and how those options affect the results.
   - Click the de-speckling option, which removes extraneous dots and smudges on the page.
   - Click the Dilate option. This option helps with dot-matrix printers where the dots don't quite touch so character recognition is challenging.
   - Click the Remove Blobs option. This option locates and removes large black objects.

Note

Optional actions:

- If you want to preserve the Image Enhancement settings that you made to use on other page types, you can use click 'Save Settings As' Image Operation.
- If you do save your configuration the 'General Settings > Rule settings:' option, is updated to use your new settings file.
- You can revert to the default settings by selecting it from the 'Rule settings:' list

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7. Configure the Import Files ruleset.
   a. Click HRF_Form at the top of the Batch Structure.
   b. Select the 'Import Files Ruleset' on the Ruleset tab.
   c. The default setting for the 'Source folder' parameter is: C:\Datacap\HRF_Form\images\Input_SingleTIFFs. If it is not set to this location, then browse to this folder.
   d. Scroll down to the 'Copy image folder' parameter.
   e. The default setting for the 'Copy image folder' parameter is: C:\Datacap\HRF_Form\images\Input_SingleTIFFs. If it is not set to this location, then browse to for this folder.

f. The settings described in Step 7.c and 7.e are the default settings so there is no need to save.

8. Look at the Identify Pages ruleset.
   a. Click HRF_Form at the top of the Batch Structure.
   b. Click the Ruleset tab in the Batch Properties pane.
   c. Select the 'Identify Pages' choice in the ruleset list.

      Notice there are lots of choices of ways to identify pages, but for this exercise use the default settings. The default method is to identify with fingerprints.

9. Configure Validate Fields ruleset.

   The validate ruleset in FastDoc has a comprehensive set of validation configuration options. You might find it necessary to create custom rules in Datacap Studio if what you want to achieve is not available through the FastDoc configuration options.

   a. In the Batch Structure pane, expand the HRF_Form > HRF_Document > HRF_Page.
   b. Select the Validate Fields ruleset on the Ruleset tab.
   c. Click the Zip field under the Batch Structure and click the ‘Validate this field' check box.

      Set Zip > Common > ‘Allow only these characters’ to '0123456789'.
      Set Zip > Length > Minimum to 5 and Maximum to 9.

   d. Click the City field under the Batch Structure and click the ‘Validate this field' check box.

      Set City > Length > Minimum length to 3.

   e. Click the State field under the Batch Structure and click the ‘Validate this field' check box.
   f. Set > State >Length Minimum length to 2.

Become familiar with, the various functionalities in the Validate Fields configuration interface.

10. Click Save to preserve your configuration changes.

Procedure 4: : Add a fingerprint for the first page of HRF_Document

1. Add Fingerprint class.
   a. Click the Fingerprints tab.
   b. Select <New> to create a new Fingerprint Class.
   c. Click Add.
   d. Enter the name HRF_FP_Class.
   e. Click Add.
   f. Click close.
2. Add a Fingerprint by using the Master Image file.
   a. Click "Add…" next to the empty Fingerprints box, then browse to C:\DC9-LabExercises\HRF_Form\HR\ and select the "Master Image.tif" file and click Open.

It is added to the Fingerprints box as a fingerprint of type 'Other' with a number like 556. It is also visible in the Image interface to the right of the Fingerprint setup.

b. Select the Fingerprint class HRF_FP_Class in the Fingerprint Class box and the page type "HRF_Page" in the Page type box.

View the Master Image, which is automatically run through Image Enhancement and is cleaned and straightened. Notice that it has square braces that mark the fields, which makes it easy to mark zones on those fields. This image is used to set up ICR on the Zip, City, and State fields and OMR on the Frequency field.

c. Fingerprint changes are saved automatically so no manual save of the configuration is necessary.

Note

Image adjustment:

You can adjust the image magnification with zoom in and zoom out icons at the top of the Image view. You can click the  sign multiple times since that makes zoning the fields easier and more accurate. You can also use the wheel on your mouse for zoom in and zoom out.

Use right-click to adjust the image position to get a good view of the fields that you want to zone.

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3. Identify the zones for all four fields: Zip, City, State. You configure the Frequency and four OMR fields by using Datacap Studio later when the OMR topic is covered.
   a. Click the Zip field in the Batch Structure pane.
   b. Draw a box with the mouse pointer in the Image, by using the brackets, which mark the Zip field.
   c. Observe that the Zone Position / Coordinates are updated. You must scroll down on the image to see the coordinates to the left of the page.

Note

Redrawing or clearing zones:

Consider the width and height of the field. Be generous with your zoning since users typically don't stay within the boxes.

If you want to rezone a field, you select the field again and redraw the zone. If you mistakenly drew a zone for a field that does not require a zone, use the Clear zone option below the zone position coordinates.

---

   d. Repeat steps 3a through 3c to draw zones for the City, and State fields.
4. Fingerprint changes are saved automatically so no manual save of the configuration is necessary.

5. Log out of the FastDoc and close the window.

Procedure 5: Identify the master image file.

1. Make sure all the configuration you just completed is working correctly. Use the Datacap Desktop client to do that testing.
   a. Open Windows Explorer and find the "Master Image.tif" file in C:\DC9-Lab Exercises\HRF_Form\HR, copy it to C:\Datacap\HRF_Form\images\Input_singleTIFFs. Remove any other images in that folder.
   b. Close Windows Explorer.
2. Open up the Datacap Desktop client and log in as admin/admin/1.
   a. Select the HRF_Form application from the Application list.
   b. Run the VScan and PageID tasks.

Procedure 6: Review the Output

1. Use Windows Explorer to look in the batches folder C:\Datacap\HRF_Form\batches\<date.00000n> and open PageID.xml.
   a. Ensure that the page type of the master image is HRF_Page and that the ScanSrcPath is Master Image.tif.
   b. Close the PageID.xml file.
   c. Close Windows Explorer.
2. Close the Datacap Desktop window.

End of exercise

Exercise 2: Add a second page

Introduction

This activity gives you a familiarity with techniques for identifying multiple instances of a second page type which result in variable-sized multi-page documents.

Procedures

Procedure 1, "Add the Donation_Receipt page to the HRF Document," on page -12

Procedure 2, "Configure the ‘Recognize Pages and Fields’ ruleset," on page -13

Procedure 3, "Add a fingerprint for the second page of the HRF_Document," on page -13

Procedure 1: Add the Donation_Receipt page to the HRF Document

1. Open the HRF_Form application with Datacap FastDoc Admin.
   a. Select Datacap Server mode and log in as admin/admin/1.
2. Add a second page.
   a. Click the Configure documents, pages, and fields icon.
   b. Go to the Batch Structure pane and click HRF_Document.
   c. Click Add Page in the right panel.
   d. Name the second page type Donation_Receipt.
   e. Click the ‘Use rulesets from’ check box to enable the option.
   f. Select Page.
   g. Click Add to add this page type.
3. Set the Document Integrity Rule.
   a. In the Batch Structure Pane, select the Donation_Receipt.
   b. Enter the following values:

      Minimum: 0
      Maximum: 0
      Order: 0

      Initially you set the page to allow documents with no added donation receipts. If you set the Minimum to 1, this setting would ensure that each HRF document has at least one Donation_Receipt with no maximum number of Donation_Receipt pages allowed in an HRF_Document.
4. Click Save.
5. Add Fields to the new page type.
   a. Click the Donation_Receipt page type in the Batch Structure pane.

b. Click Add Field and add the following fields:

Donor_Name
Value

c. Be sure to click 'Add' after you have typed in the name of the field.

6. Click Save.

Procedure 2: Configure the 'Recognize Pages and Fields' ruleset

Implement basic OCR recognition of the Donor_Name and Value fields of the Donation_Receipt page type. This configuration is different than the configuration you did for the first page of the document because that page had hand print information whereas the page type you're working with now is machine print.

1. Configure OCR recognition of the Donation_Receipt fields.
   a. Click the Donation_Receipt page type in the Batch Structure.
   b. Click the Ruleset tab and select the Recognize Pages and Fields ruleset.
   c. Check the following options:

      Enable: Read Page
      Enable: Load Zones for fields
      Enable: Read Machine print on page

2. Configure the fields.
   a. Click the Donor_Name field on the Donation_Receipt page type under the Batch Structure.
   b. The Recognize Pages and Fields ruleset is still selected.
   c. Check the following options:

      Read Field
      Add page recognition text to the zone

   d. Repeat steps 2b and 2c for the Value field.

Procedure 3: Add a fingerprint for the second page of the HRF_Document

1. Add Fingerprint class.
   a. Click the Fingerprints tab.
   b. Select <New> in the Fingerprint Class list to create a new Fingerprint Class.
   c. Click Add.
   d. Enter the name Donation_Receipt_FP_Class.
   e. Click Add.
   f. Click close.
2. Add a Fingerprint by using a typical Donation Receipt image file.
   a. Select the Fingerprint class Donation_Receipt_FP_Class.
   b. Click 'Add' next to the Fingerprints box.

c. Go to C:\DC9-Lab Exercises\HRF_Form\Donation Receipts and click BGill2.tif.

d. Click Open.

The fingerprint is added to the list in the Fingerprints box. The image that you selected displays in the image window. Image enhancement also cleans and straightens the image.

e. Select the fingerprint: 557 (Other) or a similarly numbered fingerprint of type (Other).

f. Select the Donation_Receipt_FP_Class from the Fingerprint Class list.

g. Select the page type Donation_Receipt from the Page type list.

Configure Image Enhancement.

- Image Enhancement is one of the most important rulesets to run before defining fingerprint zones. How you configure it depends on the quality of your images, which in turn determines Datacap's ability to accurately match fingerprint. And even if your initial image are high quality, later scanned images might not be good. It is important to configure Image enhancement to handle those possibilities.
- Take the time to test various types of cleanup that are available in this powerful function. Become familiar with the ways in which you can enhance the accuracy of Document capture and the user experience.

3. Draw zones for the two fields: Donor_Name and Value to extract values from the page.

a. In the Batch Structure pane, select the Donor_Name field.

b. In the Fingerprint Image Pane, draw a box around the name of the donor. Zoom in on the image to make zoning the fields easier and more accurate.

c. Observe that the Zone Position / coordinates are updated. You must scroll down on the image to see the coordinates to the left of the page.

d. Repeat steps 3.a to 3.c to draw a zone for the Value field.

4. Save the completed configuration if the Save control is enabled. If it isn't enabled, it automatically saved it.

5. Log out of FastDoc Admin and close the window.

End of exercise

Lesson .2. Recognize with ICR and OMR

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap capture system and communicate solution details to the solution architect, administrator, and users.

To build a multi-page Datacap application, you must improve your ability to recognize pages and fields with more advanced techniques. In this lesson, you use Datacap Studio to expand on the configuration for hand written text field recognition with ICR, and multiple option check boxes recognition with OMR.

Activities

- Exercise 1: Configure the ICR and OMR fields, on page -16

User accounts

Type	User ID	Password
Administrator	Administrator	passw0rd
Datacap	admin	admin

Note

Passwords are always case-sensitive.

Exercise 1: Configure the ICR and OMR fields

Introduction

This lesson extends the fingerprint configuration that you completed in the last lesson. In this exercise, you do the extended configuration that is required to optimize the accuracy of handwritten field data you capture on the HRF_Page. You also detect the filled-in bubbles on the OMR field.

All the additional configuration must be done in Datacap Studio.

Procedures

Procedure 1, "Configure OMR and add zones.," on page -16

Procedure 3, "Configure ICR of the zip code numeric field," on page -18

Procedure 4, "Configure ICR of the city field," on page -19

Procedure 5, "Configure ICR of the state field," on page -19

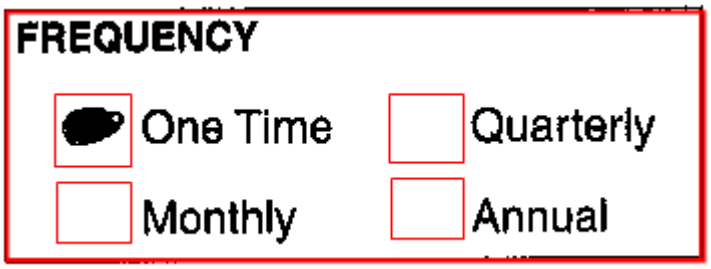
Procedure 6, "Test the ICR and OMR recognition rules," on page -20

Procedure 1: Configure OMR and add zones.

1. Check the results of the fingerprint configuration that is done in FastDoc in the previous activity.
   a. Start Datacap Studio from the desktop.
   b. Log in to the HRF_Form application as admin/admin/1.
   c. Click the Zones view.
   d. If you do not see the HRF_FP_Class fingerprint class, click the Reconnect to Database icon  .
   e. If the HRF_Page fingerprint isn't visible, expand the HRF_FP_Class fingerprint class and click the [HRF_Page] fingerprint.

      The fingerprint that you see was created earlier in the Datacap FastDoc client.
   f. Ensure that the page type of the master image is HRF_Page. Its type is displayed at the top of the Zones view Fingerprints tab.
2. Configure OMR for the Frequency field.
   a. Click the small blue lock icon in the Zones > Document hierarchy pane controls bar so that you can configure OMR.
   b. Expand the HRF_Document > HRF_Page objects and click the Frequency field.
   c. Right-click the tabs bar at the bottom of the Properties pane hover over the Show tabs help field and select OMR before you can see the OMR tab.
   d. Click OMR tab.
   e. Notice that the OMR Length field is already set to 4. This option was configured when you defined the frequency option lookup list in FastDoc. Four OMR fields that are named Frequency_OMR1 through Frequency_OMR4 are defined under the Frequency field.

f. Click the Frequency field and draw a zone around the entire Frequency section of the image; include the word "Frequency" and all 4 OMR choices.



You find it easier to zone if you zoom in and position the image until the Frequency OMR fields are easily visible in the center of the Image View pane. Use the image control bar to zoom the image.

Or use Control keys:

- Zoom in CTL +
- Zoom out CTL-

It is important to make the size of each of the zones for the frequency bubbles equal in size.

g. Click the Frequency_OMR1 field in the Document hierarchy pane and mark the ‘One time’ bubble zone on the image.

h. Repeat step 2.g to zone the other OMR fields:

Frequency_OMR2 field to the Monthly bubble zone.
Frequency_OMR3 field to the Quarterly bubble zone.
Frequency_OMR4 field to the Annual bubbles zone.

i. You should be able to see the four zones for the four Frequency subfields on the fingerprint in the Image View pane.

j. Click each OMR field again and verify that the correct bubble is highlighted on the Image View.

Procedure 2: Check ICR zone configuration

1. In the Image Window click the zoom down-arrow, next to the magnifying glass and select Fit.
2. Verify that the City, State, and Zip zones are defined correctly.
   a. Select each field on the Document hierarchy pane and verify that the correct field is zone if highlighted.

   If any of the zones were not defined correctly in FastDoc, you can correct the zones here. This operation improves your chances of getting accurate results when you test your application.

Procedure 3: Configure ICR of the zip code numeric field

1. Lock the ‘Document hierarchy’ pane, if it is not already locked.
2. Click the Zip field.
3. Click the ICR/C tab at the bottom of the Properties pane. If you do not see the ICR/C tab, then right-click one of the visible tabs at the bottom of the property pane and select ICR/C.
4. On the ICR/C tab, configure the following settings:

Locale	(*Clear this variable*)
Recognition Type	ICR Field
Remove Spaces	Yes
Boundary Handling	ON for all four directions
Character Set	0-9 - Indicates the set of values in the zone.
Country	USA
Font	Handprint - Indicates the type of print in the zone.
Length	9
Pitch	Fixed - Indicates fixed pitch characters. That is, there is no variation in the size of machine-printed characters.
Reader	Voter - Assigns a combination of RecoStar and AEG recognition.
Syntax	Numeric - Indicates the most likely type of data in a zoned field or block.
Triagram Mode	On - When on, recognition engine checks characters on both sides of a character to see whether their values are any indication of the most likely Value of the current character.

   a. Click the Save changes icon in the Document hierarchy pane to save your changes.

Procedure 4: Configure ICR of the city field

1. Select the City field on the Document hierarchy pane.
2. On the ICR/C tab, configure the following settings:

Locale	(*Clear this variable*)
Recognition Type	ICR Field
Remove Spaces	Yes
Boundary Handling	ON for all four directions
Character Set	A-Za-z ' Indicates the set of Values in the zone.
Country	USA
Font	Handprint ' Indicates the type of print in the zone.
Length	20
Pitch	Fixed ' Indicates fixed pitch characters. That is, there is no variation in the size of machine-printed characters.
Reader	Voter ' Assigns a combination of RecoStar and AEG recognition.
Syntax	Alphanumeric ' Indicates the most likely type of data in a zoned field or block.
Triagram Mode	On ' When on, recognition engine checks characters on both sides of a character to see whether their Values are any indication of the most likely Value of the character.

   a. Click the Save changes icon in the Document hierarchy pane to save your changes.

Procedure 5: Configure ICR of the state field

1. Select the State field on the Document hierarchy pane.
2. On the ICR/C tab, configure the following settings:

Locale	(*Clear this value*)
Recognition Type	ICR Field
Remove Spaces	Yes
Boundary Handling	ON for all four directions
Character Set	A-Za-z ' Indicates the set of Value in the zone.
Country	USA
Font	Handprint ' Indicates the type of print in the zone.
Length	2

Pitch	Fixed ' Indicates fixed pitch characters. That is, there is no variation in the size of machine-printed characters.
Reader	Voter ' Assigns a combination of RecoStar and AEG recognition.
Syntax	Alphanumeric ' Indicates the most likely type of data in a zoned field or block.
Triagram Mode	On ' When on, recognition engine checks characters on both sides of a character to see whether their Values are any indication of the most likely Value of the character that is being identified.

3. Save and unlock the Document hierarchy in the Zones view.
4. Exit Datacap Studio.

Procedure 6: Test the ICR and OMR recognition rules

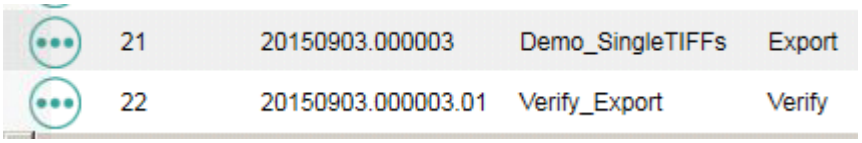
1. Prepare testing.
   a. Go to the C:\Datacap\HRF_Form\images\Input_SingleTIFFs folder and delete the ‘Master Image.tif’ file.
   b. Copy images from C:\DC9-Lab Exercises\HRF_Form\HR\ Sample Image1,2, and 3 to the C:\Datacap\HRF_Form\Images\Input_SingleTIFFs images folder.
2. Open the Datacap Desktop client and log in as admin/admin/1.
   a. Select the HRF_Form application if it is not selected.
   b. Run VScan, PageID, and Profiler tasks.

      When you run the Profiler step, you see a message that a child is created. This action is because based on the validate conditions some images might be identified as needing verifier attention and are created of to a child batch and directed to the Verify list. Others might be identified as being correct according to the validate conditions, and these images are left in the parent batch and sent directly to the Export list.
   c. Click the All link.
   d. Click the BatchID column header to reorder the batches.

      You see the parent batch wait at the Export Step, <todaysdate>.00000n.

      You see the Verify_Export child batch wait at the Verify Step, <todaysdate>.00000n,01.

      This image shows the parent and child batch for the batch you just ran. The BatchID you see might is different.



3. Review the Profiler task output

   a. Look in the parent batches folder and open the Profiler.xml file.
   C:\Datacap\HRF_Form\batches\<date.00000n>

   All documents that are listed in this file have a document status of ‘STATUS : 0’. If there are no documents listed in the Profiler.xml file, then all of the documents have a problem and have been directed to the Verify_Export batch go to the Verify task.

   b. Look in the created child batches folder and open the bsplit01.xml file.
   C:\Datacap\HRF_Form\batches\<date.00000n.01>

   All documents that are listed in this file have a document status of ‘STATUS : 0’ and also have a ‘NeedsVerify : Yes’ value set. This is because the page status of ‘STATUS : 1 is set.

   Conclusion: Each document that contains a page that has a ‘NeedsVerify : Yes’ status, is routed in the created child Verify_Export batch to the Verify task.

   The’ NeedsVerify’ condition is set if any field confidence values are < 0.8 or if any other validation rule is not satisfied. At this point, you have not configured any validation conditions so the only cause for having the NeedsVerify condition set, is low character confidence.

   c. In the bsplit01.xml file, click the DATAFILE link for each page. Look at the Confidence value for every field that is read from each page.

   You see at least one-character confidence value that is < 0.8 in each page .xml file.

4. In Datacap Desktop, run the Verify task.

   Your observations from step 3 should reveal that two of the images that are scanned are flagged for verification.

   a. In Datacap Desktop, double-click the created child task that is waiting at the Verify task.

   b. In the Batch View, expand each document and click the page node.

   c. Notice that there is at least one misinterpreted character on each page.

   d. Click each field that is flagged as an error end notice that value field is displayed with a yellow background. The yellow background indicates a low character confidence condition.

   e. Correct fields that were not correctly interpreted.

   f. Run Validations and then Submit.

   g. Click OK on the ‘Validation Failed. Override and Continue’ message if it is displayed.

5. Click OK to complete the Validate step.

6. Close Datacap Desktop.

End of exercise

Lesson .3. Validate with database lookup

Overview

Why is this lesson important to you?

As a Datacap business analyst, you build and deploy applications with the Datacap capture system and communicate solution details to the solution architect, administrator, and users.

To build intelligent Datacap applications, you need to be expert at doing database lookups to validate data that is interpreted on the captured pages. In this lesson, you validate a Zip Code with database lookup to illustrate this important skill.

Activities

- Exercise 1: Configure a zip code database lookup, on page -23
- Exercise 2: Configure a zip code truncate ruleset, on page -27

User accounts

Type	User ID	Password
Administrator	Administrator	passw0rd
Datacap	admin	admin

Note

Passwords are always case-sensitive.

Exercise 1: Configure a zip code database lookup

Introduction

This activity gives you practice at configuring a lookup database connection and then by using the database lookup to write a zip code validate rule.

Procedures

Procedure 1, "Configure the zip code database connection," on page -23

Procedure 2, "Configure lookup validation," on page -23

Procedure 3, "Test the lookup configuration," on page -24

Procedure 1: Configure the zip code database connection

Now that you extracted data from the zones, you configure a database of known Zip Code values and use the Zip code database to validate the Zip code that was detected with ICR. If it is a valid Zip code, you populate the City and State fields on the verify form by using the data in the database. You also update the fields with those Values.

If the zip code isn't in the database, you populate the City and State fields with the ICR'd information.

1. Copy the Zipac.mdb file from C:\DC9-Lab Exercise\HRF_Form\HR to the C:\Datacap\HRF_Form folder.
2. Start the Datacap Application Manager and select the HRF_Form application.
3. Connect to the Zipac.mdb database.
   a. Click the ellipsis for the Lookup database field.
   b. Select Microsoft Access (Jet) for the database type.
   c. Click the Database ellipsis, go to the C:\Datacap\HRF_Form folder, select Zipac.mdb, and then click Open.
   d. Click 'Test Connection'.
   e. Click close, then click OK.
4. Close Datacap Application Manager.

Procedure 2: Configure lookup validation

1. Log in to the HRT_Form application with FastDoc(Admin) in the Datacap Server mode. User: Admin, Password: admin, Station: 1.
2. Click the Configure documents, pages, and fields icon in the left column and expand the Batch Structure.
3. Prepare to configure Lookup on the Validate Fields > Field level rule.
   a. Click the ‘Ruleset’ tab in the Field Properties Pane.

b. Select the ‘Validate Fields’ ruleset from the Ruleset list.

c. Expand the Document > HRF_Document > HRF_Page in the Batch Structure Pane.

4. Configure lookup parameters at the field level.

Field Lookup SQL statements

Field	SQL
City	SELECT City FROM zipac WHERE Zip=’+@P\Zip+’;
State	SELECT State FROM zipac WHERE Zip=’+@P\Zip+’;
Zip	SELECT Zip FROM zipac WHERE Zip=’+@P\Zip+’;

a. Select a ‘Field’ from HRF__Page that is defined in the ‘Field Lookup SQL’.

Selecting a field object in the Batch Structure determines what structure object level you configure.

b. Set Lookup check box. You see lookup parameters are automatically exposed.

c. For Database: select HRF_Form:lookupdb

d. For SQL statement: type the SQL statement from the table for the selected field.

e. Set the Populate field check box.

f. Repeat Step 4.a to 4.e for the other fields in the ‘Field SQL statements table.

g. Click Save Next to the Field Properties label to save your changes.

h. Log out and close the FastDoc window.

Procedure 3: Test the lookup configuration

1. Prepare testing.

a. Delete the images from the C:\Datacap\HRF_Form\Images\Input_SingleTIFFs images folder.

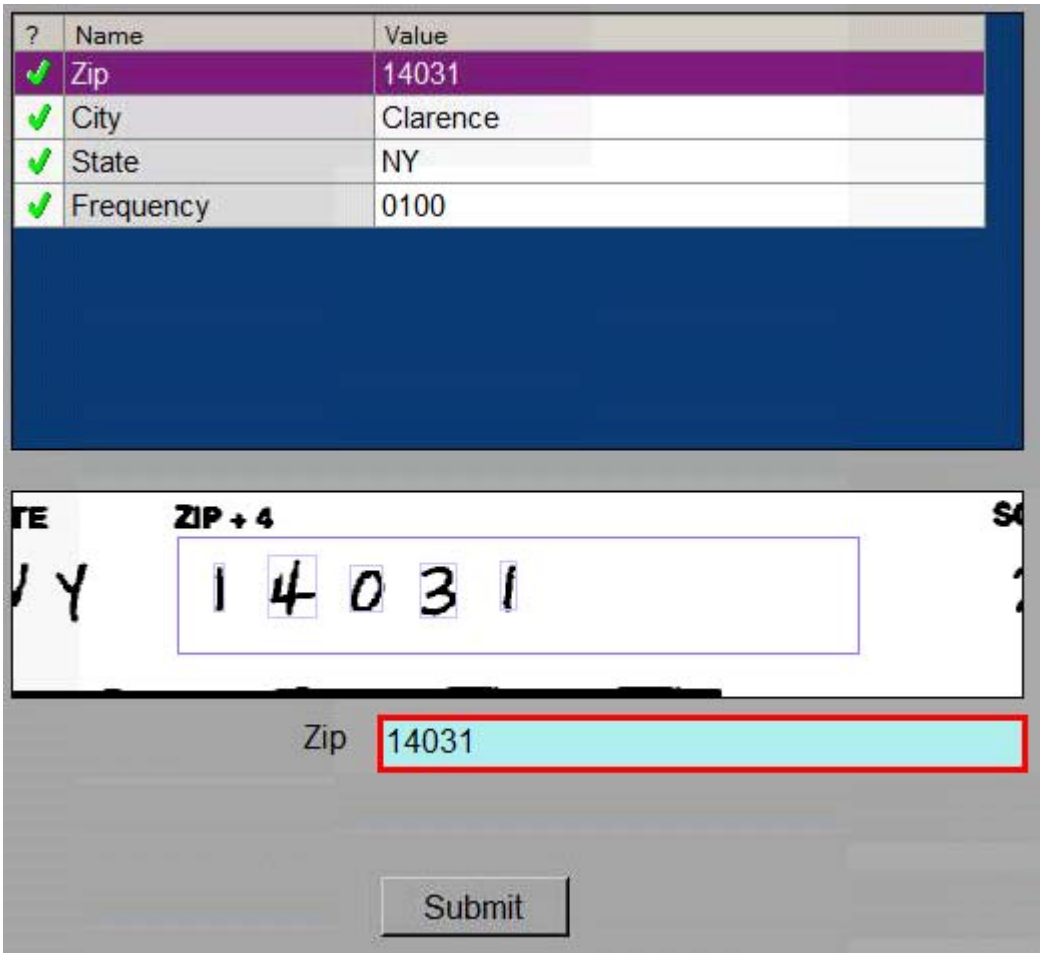
b. Copy images from C:\DC9-Lab Exercises\HRF_Form\HR Images with Receipts\ PSanderson1,2, and 3 to the C:\Datacap\HRF_Form\Images\Input_SingleTIFFs images folder.

2. Open the Datacap Desktop client and log in as admin/admin/1.

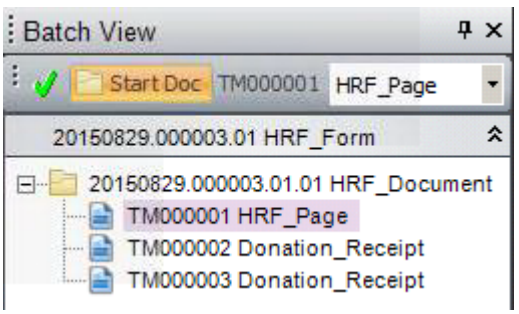
a. Select the HRF_Form application if it is not selected.

3. Run the VScan, PageID, Profiler, and Verify tasks.

4. You see the following results on the Verify panel.
   a. Notice that the City name is different than what was read from the image. This condition is because the City and State were updated from the values read from the zipac lookup table.

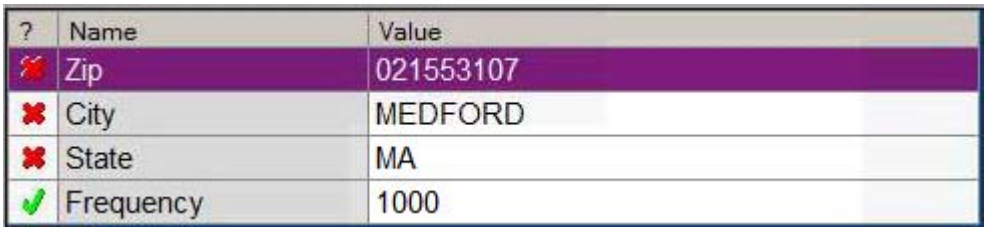


   b. See also the document with three pages in the Batch View.
   c. Click each page in the document on the Batch View and verify that the values were read correctly for all the pages.



   d. Click Submit and OK to finish the batch; then click OK.

5. Replace the Sanderson Batch with the Gerety Batch and process the batch.
   a. Delete the PSanderson batch from the C:\Datacap\HRF_Form\Images\Input_SingleTIFFs images folder.
   b. Copy the PGerety four page batch from C:\DC9-Lab Exercises\HRF_Form\HR Images with Receipts folder to the C:\Datacap\HRF_Form\Images\Input_SingleTIFFs images folder.
   c. Run the VScan, PageID, Profiler, and Verify tasks.
   d. You should see the this image in the Verify panel.



?	Name	Value
✖	Zip	021553107
✖	City	MEDFORD
✖	State	MA
✓	Frequency	1000

   e. Why do you think the three ICR fields are flagged as errors?

      Answer: The Zip field of the Zipac lookup database has only five digit zip codes. The lookup rule fails for all three fields.

   f. Delete the last 4 digits of the Zip value and click ‘Run Validations’.
   g. Click Submit and OK for ‘Task profile succeeded.’
   h. Click OK for ‘All Documents are complete. Finish batch?’
   i. Click OK. the to complete the task.
   j. Close the Datacap Desktop window.

End of exercise

Exercise 2: Configure a zip code truncate ruleset

Introduction

This activity gives you create and configure a ruleset rule that truncates a nine-digit zip code to 5 digits because the zipac.mdb database has five-digit zip codes.

Procedures

Procedure 1, "Create a Validate ruleset," on page -27

Procedure 2, "Add the rule to the Zip field," on page -28

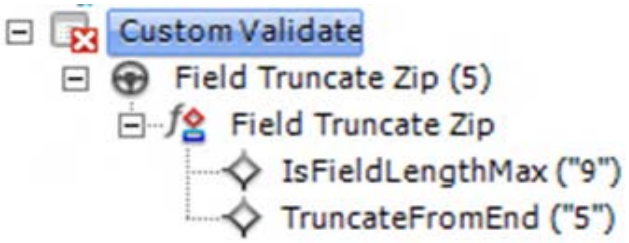
Procedure 3, "Add the ruleset to the task profiles.," on page -28

Procedure 4, "Test the zip code truncate rule," on page -28

Procedure 1: Create a Validate ruleset

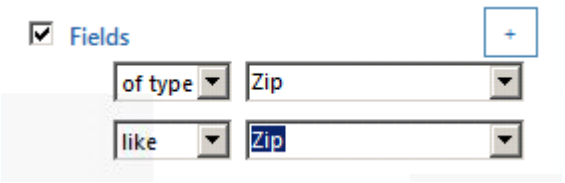
1. Log in to Datacap Studio for HRF_Form application and use admin/admin/1 to Authenticate. You are ready to create a Locate ruleset.
   a. On the Rulemanager tab, right-click the HRF_Form heading in the middle pane and Select 'Add Ruleset.'
   b. The new ruleset is already locked for editing. Name the ruleset ‘Custom Validate’.
2. Configure the rule to truncate the zip code to 5 characters.
   a. Click Rule1 and name it ‘Field Truncate Zip (5)’ in the properties pane.
   b. Click Function1 and change name to ‘Field Truncate Zip’ in the properties pane.
   c. Go to the Validations library and add the following actions to the ‘Field Truncate Zip’ function.

      IsFieldLengthMax
      TruncateFromEnd
3. Set action properties.
   a. Click the IsFieldLengthMax action in ‘Field Truncate Zip’ function.
   b. Set the IsFieldLengthMax action property to 9.
   c. Click the TruncateFromEnd action in ‘Field Truncate Zip’ function.
   d. Set the TruncateFromEnd action property to 5.
4. Save and Publish the Locate ruleset.



Procedure 2: Add the rule to the Zip field

1. Lock the ‘Custom Validate’ Ruleset again.
2. Select the ‘Field Truncate Zip (5) rule.
3. In the Properties pane, expand the ‘Run rule at the start of ’.
4. Click the Fields check box.
   a. Click the + icon twice and configure the parameters as shown in the image.



5. Save and Publish the Locate ruleset.

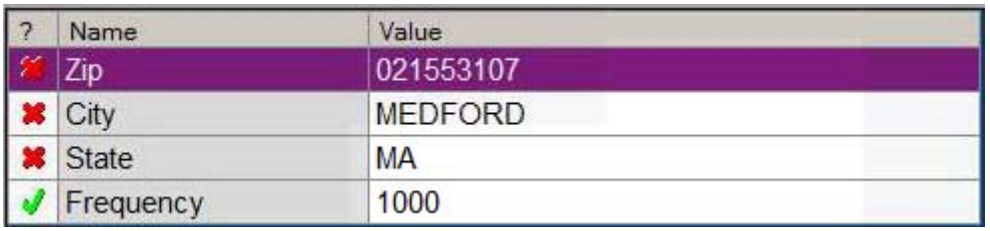
Procedure 3: Add the ruleset to the task profiles.

1. Click the ‘Custom Validate’ ruleset in the Ruleset pane.
2. Go to the Task Profiles tab in the upper right pane.
3. Click the blue lock in on the control bar to lock the task profiles for editing.
4. Click the Profiler task and click the ‘Add ruleset to profile’ control at the left of the ‘Task profiles’ pane.
   a. Use the arrow icons on the control bar to position the ‘Custom Validate’ ruleset immediately below the ValidateFields ruleset.
5. Click the Verify task and click the ‘Add ruleset to profile’ control at the left of the ‘Task profile’ pane.
   a. Use the arrow icons on the control bar if necessary to position the ‘Custom Validate’ ruleset immediately below the ValidateFields ruleset.
6. Save and unlock the Task Profiles.
7. Click Exit to close the Datacap Studio window.

Procedure 4: Test the zip code truncate rule

1. Open Datacap Desktop.
2. Log in using admin/admin/1 and select the HRF_Form application.
3. Run the VScan, PageID, Profiler, and Verify tasks.
4. Notice that the zip codes are now all truncated to 5 digits so the lookup does not fail when a nine-digit zip code is extracted from the image with ICR recognition.

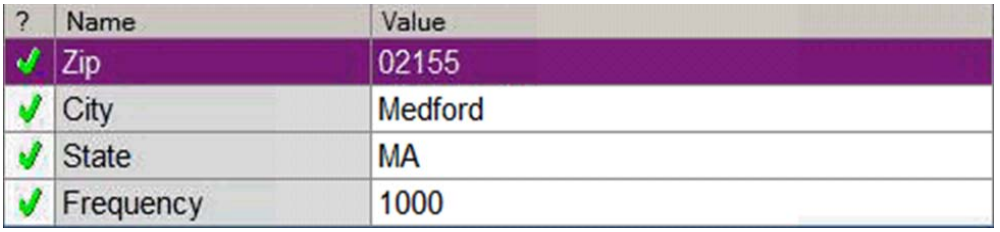
5. If you still see the failed condition, then ‘Run Validation’ to clear the error.



?	Name	Value
✗	Zip	021553107
✗	City	MEDFORD
✗	State	MA
✓	Frequency	1000

   a. Click ‘Run Validations’.

   b. Click OK for the ‘Task profile succeeded.’



?	Name	Value
✓	Zip	02155
✓	City	Medford
✓	State	MA
✓	Frequency	1000

   c. Click Submit.

   d. Click OK for the ‘All documents are completed. Finish batch?’ message.

   e. OK to finish the batch, then click OK.

6. Close the Datacap Desktop window.

End of exercise

Appendix A. System Check for Your Student System

Appendix overview

This appendix contains the following activities.

Activities

Start student system components, on page A-2

Check the WebSphere Application Server, on page A-4

Restart the student system, on page A-7

System Components

The server image is a Microsoft Server 2008 with an IBM FileNet P8 Platform 5.2.1, IBM Navigator, IBM Datacap 9.0.1 The server image also has Tivoli, DB2, WebSphere Application Server, Visual Studio, installed.

All files that are required for the student activities are on the image.

Start student system components

Procedures

Procedure 1, "Start student system components," on page A-2

Procedure 2, "Start Datacap Server," on page A-2

Procedure 1: Start student system components

1. Start your Server 2008 system:
   a. Log in as `administrator` user (password: `passw0rd`)
2. Start the WebSphere hosted system components.

   There is a WebSphere Admin folder on the image desktop. This folder contains scripts to start stop and manage the WebSphere components. There are WebSphere instances but you use only Server 1 in this class.

   Start the WebSphere components by running the start script.

   a. From the image desktop, double-click the `WebSphere Admin Folder`.
   b. Double-click the Start Server1.bat script.
   c. A Windows command window opens while the script is running. Wait for the command window to close, which signifies that the WebSphere components are started.

      The start process can take several minutes.
   d. The Terminal window closes when the services started.

Information

The following components are hosted on WebSphere Server1:

- DatacapEDSService
- FileNetEngine
- IDSWebApp
- SampleEDSServices
- WorkplaceXT
- Navigator

Procedure 2: Start Datacap Server

1. Click Start > All Programs > IBM Datacap Service > Datacap Server Manager.

   The Taskmaster Server Manager window is shown.

2. Click the Service tab.
3. Click the Start icon  to start the The Datacap Taskmaster Server Service if it is not already started. The Start operation is disabled if it is already started.
4. Click Close to close the Taskmaster Server Manager window.

Check the WebSphere Application Server

Procedures

Procedure 1, "Check the WebSphere Application Server," on page A-4

Procedure 2, "Check the Content Engine," on page A-4

Procedure 3, "Check the Process Engine," on page A-5

Procedure 4, "Check the Administration Console," on page A-5

Procedure 5, "Check the IBM Navigator," on page A-5

Procedure 6, "Check the Datacap Components," on page A-5

Procedure 1: Check the WebSphere Application Server

1. On your image desktop, double-click the WebSphere Admin folder if it is not already open.
2. Double-click the Administrative console server1 shortcut to go to the WebSphere login window at `https://ecmedu01:9043/ibm/console/logon.jsp`.
3. Log in as `p8admin` user with `IBMFileNetP8` as the password.

   If the WebSphere server is running, the page shows the Integrated Solution Console.

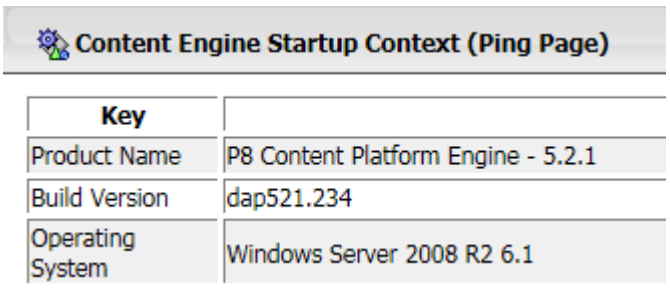
   a. Log out of the Integrated Solutions Console.
4. If an error page is shown instead, the WebSphere is not running. Start it as directed in the procedure Start student system components, on page A-2.
5. Leave the browser open for the next procedure.

Procedure 2: Check the Content Engine

1. In the Internet Explorer browser click `Bookmarks > P8 CPE-Ping` or enter the following URL: `http://ecmedu01:9080/FileNet/Engine.`

   Log in using User = `p8admin` Password = `IBMFileNetP8`

   The Content Engine is running if you get the *Content Engine Startup Context (Ping Page)* page as shown in the following screen capture.



Content Engine Startup Context (Ping Page)

Key	
Product Name	P8 Content Platform Engine - 5.2.1
Build Version	dap521.234
Operating System	Windows Server 2008 R2 6.1

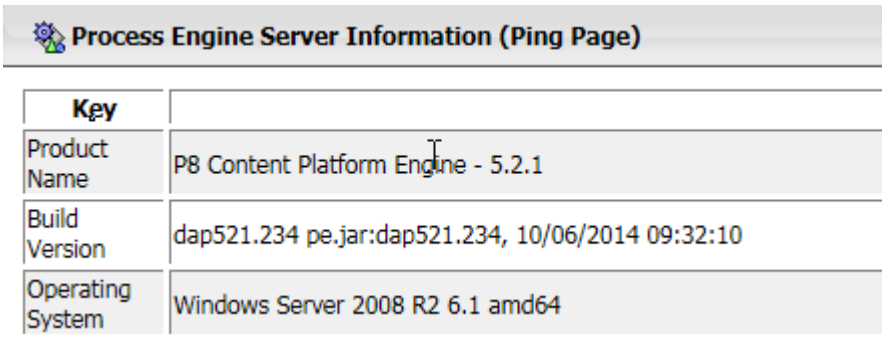
2. If an error page is shown instead, the Content Engine is not running. Start it as directed in the procedure Start student system components, on page A-2.

Procedure 3: Check the Process Engine

1. In the Internet Explorer browser click `Bookmarks > PE Server-Ping` or enter the following URL: `http://ecmedu01:9080/peengine/IOR/ping`.
2. Log in as `p8admin` with password `IBMFileNetP8`.

   The Process Engine is running if you get the *Process Engine Server Information (Ping Page)* page as shown in the following screen capture.

   .



3. If an error page is shown instead, the Process Engine is not running. Start it as directed in the procedure Start student system components, on page A-2.

Procedure 4: Check the Administration Console

1. In the Internet Explorer browser click the ACCE-CPE shortcut or enter the following URL: `http://ecmedu01:9080/acce`.
2. Log in as `p8admin` with password `IBMFileNetP8`.
3. The Administrative Console for Content Platform Engine is running if the Browse page opens. The page shows a list of Object Stores.
4. If Administrative Console for Content Platform Engine does not open, start it as directed in the procedure Start student system components, on page A-2.

Procedure 5: Check the IBM Navigator

1. In the Internet Explorer browser click the ICN-ADMIN shortcut or enter the following URL: `http://ecmedu01:9080/navigator`.
2. Log in as `p8admin` with password `IBMFileNetP8`.
3. The IBM Content Navigator is running if you get the IBM Content Navigator page.
4. If IBM Content Navigator does not open, start it as directed in the procedure Start student system components, on page A-2.

Procedure 6: Check the Datacap Components

1. Check Datacap Navigator.
   a. In Internet Explorer browser click the DCN-Datacap shortcut or enter the following URL: `http://ecmedu01:9080/navigator/?desktop=datacap`.

b. Log in as `admin` with password `admin`.

c. The Datacap Navigator is running if the Datacap Navigator page opens.

2. Check the tmweb client.

a. In the Internet Explorer browser click the tmweb shortcut or enter the following URL: `http://ecmedu01/tmweb.net`.

Select the TravelDocs Application.

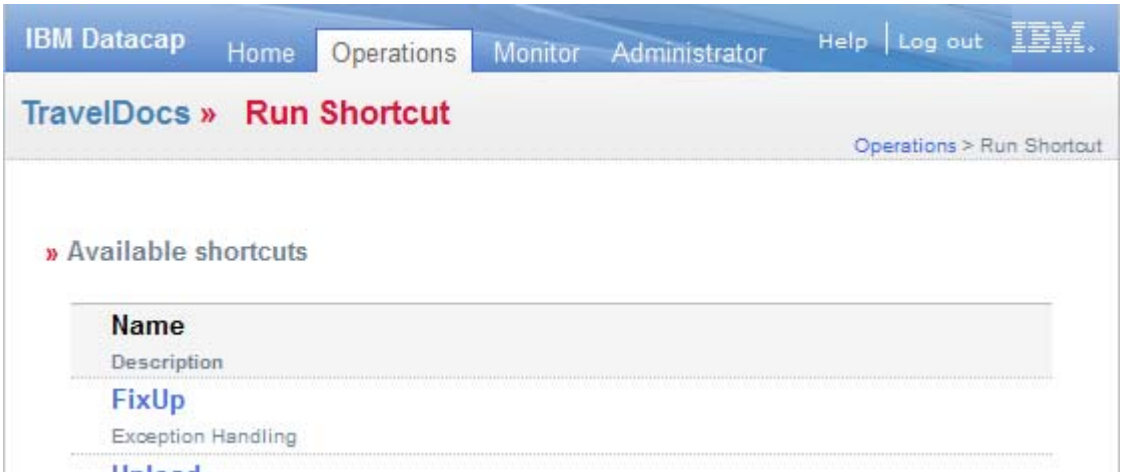
User ID: `admin`

Password: `admin`

Station 1

b. Click Login.

c. The tmweb page opens showing the Operations tab view.



d. If the login fails, it is possible that the Datacap Server Service was not started.

e. Click log out and close the explorer window.

Restart the student system

Procedures

Procedure 1, "Restart the student system (if needed)," on page A-7

Procedure 2, "Start the Content Engine (use only if required)," on page A-7

Procedure 1: Restart the student system (if needed)

If you need to reboot your student system, do the following steps.

1. Stop the WebSphere hosted system components.

   Stop the WebSphere components by running the stop script from the WebSphere Admin folder on the image desktop.

   a. On the desktop, double-click the `WebSphere Admin Folder`.

   b. Double-click the StopServer1.bat script.

   c. A Windows command window opens while the script is running. Wait for the command window to close.

   d. The Terminal window closes when the components are stopped.

2. Stop the Datacap Server service.

   a. Click Start > All Programs > IBM Datacap Service > Datacap Server Manager.

   b. The Taskmaster Server Manager window is shown.

   c. Click the Service tab.

   d. Click the Stop icon  to start the The Datacap Taskmaster Server Service if it is not already started.

   e. Click Close to close the Taskmaster Server Manager window.

3. Restart the windows server.

   a. Click Start > Restart.

   b. Do Procedure 1, "Start student system components," on page A-2

   c. Do Procedure 2, "Start Datacap Server," on page A-2

Important

Perform the following procedures **only if** you need to manually start individual components. After starting your Server 2008 system, and running Procedure 1, the script should start all of the required components on your student system. If you need to check or start individual WebSphere components do the following procedure.

Procedure 2: Start the Content Engine (use only if required)

1. On your system desktop, double-click the WebSphere Admin folder.

2. Double-click the Administrative console server1 shortcut to go to the WebSphere login window at `https://ecmedu01:9043/ibm/console/logon.jsp`.
3. Log in as `p8admin` user with `IBMFileNetP8` as the password.
4. Expand the Applications > Application Types node in the left pane, and then click WebSphere enterprise applications.

   In the right pane, the Content Engine application is listed as `FileNetEngine`.
5. Check the status of the application. If a red X is shown in the Application Status column, the application is stopped.
6. If the FileNetEngine application is stopped, select the check box for `FileNetEngine` and click Start.
7. Log out of the console and close the browser.

Configure Datacap Rulerunner for TravelDocs

Procedures

Procedure 1: Stop and Connect

1. Open the Rulerunner Server Service properties.
   a. Double-click the Rulerunner Server Manager on the desktop.
   b. Click Stop if the Rulerunner is already started.
   c. Click the Rulerunner Login tab to display it.
   d. Select Taskmaster Authentication.

      Type:
      User ID: admin
      Password: admin
      Station ID: 1

   e. Click Save if you changed the User ID or Station ID. If you only entered the password the Save control will not be active.

      It is critical that these credentials are saved because they are used at runtime.

   f. Click Connect.

Procedure 2: Configure TravelDoc tasks.

2. Configuring Rulerunner to run tasks.
   a. Click the Workflow:Job:Task tab to display it.

      The names of the applications from the datacap.xml file are displayed in the left pane. The right pane does not contain threads the first time you use Rulerunner Manager.

   b. If you don’t see a list of application in the top left pane, click the full screen icon in the top right corner.

Note

This server image is used for multiple Datacap classes. You can see in the right pain that tasks have already been configured for Rulerunner to run the Navigator Job tasks for the TravelDocs application.

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   c. If a thread did not already exist or if you want to create a new thread then right-click in the right pane, select Threads, then select Add Thread.

      A new thread is created in the right pane. For this exercise you use the existing thread.

   d. In the left pane, click the TravelDocs check box.

e. The application tree expands with the Server, Administrator, and Engine databases selected.

f. Click the check boxes under the Main Job, Web Job and the Navigator Job for the PageID, Profiler, and Export tasks.

g. Click the Main Job text and drag it to the thread0 node in the right pane. Release the mouse key while the cursor is hovering over thread0.

h. Verify that PageID, Profiler, and Export tasks appear under thread0for the Main Job, Web Job and the Navigator Job.

i. Click Save (or CTRL+S) to save your changes.

j. If you see a warning that the file does not exist, click Yes acknowledge the warning and to save the configuration file.

k. Make sure that the thread0 check box in the right pane is selected.

3. Disconnect from the application

a. Click the Rulerunner Login tab.

b. Click Disconnect.

c. Close the Datacap Rulerunner Manager Window.

Enable Datacap Rulerunner logging.

1. If Rulerunner is connected then do Procedure 1, "Stop and Connect," on page A-9 to open and connect to Datacap Rulerunner Manager.
2. Configure Logging.
   a. Click the Settings tabs and click *Write to Debug. Log Queuing activity in debug table*.
   b. Click Save or CTRL+S to save your changes.
   c. Click the Logging tab.
   d. Click the Quick Log tab.
   e. Slide the Number of Messages slider to No.
   f. The Quick Log setting sets the ATM Rulerunner, and RRS log logging options.
3. Disconnect from the application
   a. Click the Rulerunner Login tab.
   b. Click Disconnect.
   c. Close the Datacap Rulerunner Manager Window.

Start the Datacap Rulerunner Manager Service.

Procedure 1: Start the Rulerunner service.

1. Double-click the Datacap Rulerunner Manager icon on the Desktop.
2. Click the Rulerunner tab.
3. Click Start.
4. Close the Datacap Rulerunner Manager window.

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