

Course Guide

IBM Datacap 9.0.1: FastDoc Local Mode

Course code F252 ERC 1.0



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Course description

IBM Datacap 9.0.1: FastDoc Local Mode

Duration: 4.0 hours

Purpose

This unit introduces you to the Datacap FastDoc user interface. It then focuses on the batch configuration and upload processing in Local mode.

Audience

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

Prerequisites

- Familiarity with capture concepts
- The following course or equivalent knowledge is required:
IBM Datacap 9.0.1: Introduction (F251)

Objectives

Upon completion of this course, participants will be able to:

- Identify the FastDoc capabilities and modes of operation:
FastDoc User Interface (Local mode and Datacap Server mode)
FastDoc as a development tool and as client
- Configure and run tasks in the local mode
Configure a local batch
Process documents in local mode
Configure a Scan and Upload Task

Contents

Refer to the “Contents” section (TOC) for course content.

Curriculum relationship

This course is a pre-requisite for the following IBM Datacap courses:

- IBMDatapac 9.0.1: FastDoc Server Mode (F253)
- IBMDatapac 9.0.1: FastDoc Multi-Page Document (F254)

Agenda

**Note**

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

Day 1

- (00:30) Lesson 1 - FastDoc overview
- (00:30) Lesson 2 - FastDoc Local mode
- (01:00) Lesson 3 - Create local capture batch
- (01:00) Lesson 4 - Process Local batches
- (01:00) Lesson 5 - Configure scan and upload

Unit 1. FastDoc Local Mode

Estimated time

04:00 Hrs

Overview

This unit introduces you to the Datacap Fastdoc. It then proceeds to focus on the Local mode batch and task configuration and local and upload processing.

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.datacaptoc.doc/datacap_9.0.1.htm

Unit Objectives

After completing this unit, you should be able to:

- Identify the operating modes of Datacap FastDoc.
- Configure batches for off line processing.
- Scan and upload a batch

Lesson 1.1. FastDoc Overview

FastDoc Overview

FastDoc Local Mode

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Figure 1-2. FastDoc Overview

Lessons

- ▶ FastDoc Overview
 - FastDoc local mode
 - Create a local capture batch
 - Process local batches
 - Configure Scan and Upload

FastDoc Local Mode

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Figure 1-3. Lessons

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system.
- This lesson gives you a broad overview of the capabilities of the FastDoc as a rapid development tool and as a user client.

What Is FastDoc?

- It is a flexible Datacap interface with three primary functions:
 - Rapid application development with the FastDoc (Admin) interface.
 - Process batches partially or completely in the Local - Offline mode on the local machine.
 - Process batches with the online Datacap server mode as a client.
- FastDoc operation modes
 - Local – Offline Mode
 - Datacap Server – Online Mode
 - FastDoc is used as a client interface for manually running a task for a batch that is in the Datacap Server queue.

FastDoc Local Mode

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Figure 1-5. What Is FastDoc?

FastDoc operation modes

FastDoc has two modes of operation:

- Local - Offline Mode
 - Used for processing batches partially or completely, on the local machine before uploading to Datacap server.
 - The Local mode can be configured to run batches for multiple applications.
- Datacap server - Online Mode.
 - In the Datacap server mode, FastDoc is used as a client interface for manually running a task for a batch that is in the Datacap Server queue.
 - When logging in the Datacap server mode, you are connected to a specific application.

FastDoc Versatility

- Offline development
 - Define offline workflows and tasks.
- Online development
 - With Admin interface, FastDoc functions as a rapid development tool.
 - Configure document, page, and field objects, fingerprints, field location, validation rules, and export rules
- Local – Offline Client
 - Functions as a stand-alone processing or application development tool
- Datacap server – Online Client
 - Functions as client interface to an application on the server or a rapid development tool by using predefined application templates.

FastDoc Local Mode

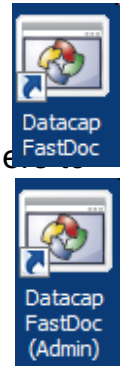
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Figure 1-6. FastDoc Versatility

- FastDoc is most likely to be run in the local mode when it is installed in a workstation that is at a site remote from the Datacap File Server. In this case, a copy of the applications that it runs must be installed at the remote site together with FastDoc.
- FastDoc is run in the Developer Workstations for Business Analysts or Application developers to Create or Configure Applications.
- If FastDoc is intended to run in the Datacap Server, then it is installed on a Client Workstation that is at the site where the Datacap File Server is located. In this case, the application that is built to process the batches does not need to be installed on the Client Workstation. The Client Workstation has access to the Datacap file server where the central application is installed.

FastDoc interfaces

- There are two FastDoc interfaces:
 - User Version is used for processing document in either Local or Datacap server mode.
 - Administrator Version is used by Administrators or Application Builders to configure or process document batches.
- Each interface can run in two modes:
 - Select the run mode from the login window.
- The run modes are:
 - Local mode when:
 - Connection to the server isn't stable.
 - FastDoc is installed at a remote site.
 - Database tracking and sharing application resources are | ☐ Local ☒ Datacap Server
 - Datacap Server mode
 - Run FastDoc as a Datacap Client while for manually running a task for a workflow that is in the Datacap Server queue.



Welcome to Datacap

| ☐ Local ☒ Datacap Server

FastDoc Local Mode

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Figure 1-7. FastDoc interfaces

FastDoc interfaces

FastDoc has two operation interfaces:

- User Version, FastDoc
 - For users to process document batches in either Local or Datacap Server mode.
 - Click Start > All Programs > IBM Datacap Clients > FastDoc
- Administrator Version, FastDoc (Admin)
 - For Administrators or Application Builders to configure workflow processing for the local mode.
 - For Administrators or Application Builders to process document workflows in either local or Datacap Server mode.
 - Click Start > All Programs > IBM Datacap Clients > FastDoc (Admin)
- Select the Local or Datacap Server mode on the login window.

FastDoc Interface Icons

FastDoc	Purpose	Explanation
1 	Provides a list of icons for processing documents.	The user can click these shortcuts to process documents.
2 	Configure documents, pages, and fields Admin mode only	This option is used to design and configure documents, pages, and fields.
3 	Configure workflow Admin mode only	This option is used to design and configure jobs and tasks.
4 	Configure local batches Admin mode only	This option is used for configuring local batches for offline processing.
5 	Logout	To logout from FastDoc
6 	Application Wizard	For Creating New Applications

FastDoc Local mode

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Figure 1-8. FastDoc Interface Icons

- With the User interface in either the local or Datacap Server mode, you see only icon 5. You are always presented with the batch processing view.
 - In the local mode, you can run only local workflows that are already configured.
 - In User Datacap Server mode, you run only task from the Shortcuts list.
- In Admin local mode, you can see 1, 4, 5, and 6.
 - Use 1 to Process batches.
 - Use 4 to configure local workflows.
- In Admin Datacap Server mode, you can see 1, 2, 3, 5, and 6.
 - Use 1 to Process batches on the server.
 - Use 2 and 3 to configure the batch structure, fingerprints, and rulesets. (Build the Application)

FastDoc overview (1)

- Before you begin:
 - Decide whether you want to use the Admin or the User interface.
 - The same login window is used for both interfaces.
 - The login Credentials are only required for Datacap Server mode.

The image displays two versions of the 'Welcome to Datacap' login window. The left window shows the 'Local' mode selected, indicating that no credentials are required. The right window shows the 'Datacap Server' mode selected, which requires the user to provide application-specific details: Application (FastBuild), User (admin), Password, and Station (1). Both windows feature a 'Login' button and the IBM logo.

FastDoc Local Mode

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Figure 1-9. FastDoc overview (1)

Images on the slide show the FastDoc login window.

When to use?

- You are always prompted to log in every time you start one of the FastDoc interfaces.
- If you select the Local option, the credential fields go away. In the Local mode, you select the batch that you want to configure or run inside the interface.
- If you select the Datacap Server mode, then you are required to select the specific application to connect to and to provide valid credentials for the application.

Before you Begin

- Decide whether you want to use the Admin or the User interface.
- Decide whether you want to run in the Local - Offline mode or the Datacap Server mode.

FastDoc Local login

- For either (Admin) or (User) interface, you can select the Local - Offline mode (no login credentials are required).
 - Click Local and click Login
- In the Local mode, you can run a batch of any application that has a defined batch profile.

FastDoc Datacap Server login

- For either (Admin) or (User) interface, you can log in to the Datacap Server - Online mode by selecting an application, providing login credentials, and a station filter and then clicking Login.

Application: (Select application from list)

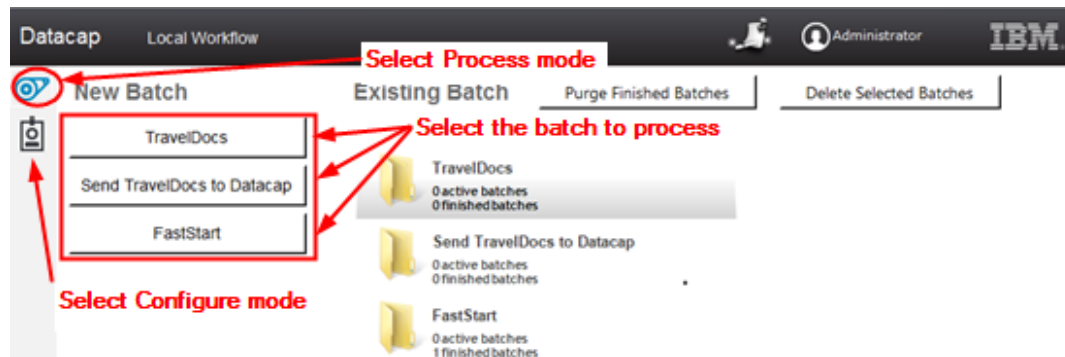
User: admin

Password: admin

Station ID: 1

- Click Login.
- In the Datacap Server mode, you log in to a specific application based on station filter description and configured privileges and permissions.
- You can run only tasks for the application you are logged in to.

FastDoc overview (2)



- Batches are defined in the Configure mode.
- The Configure mode is only available in the Admin interface.
- Batches automatically progress from one task to the next until the workflow is completed.
 - Only one Batch link is required to run all of the tasks.

FastDoc Local Mode

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Figure 1-10. FastDoc overview (2)

The image on the slide shows the Local mode Process batches view.

- Only one link is required to run all of the tasks in a batch because when the batch is initiated FastDoc automatically runs all of the tasks that are defined for the batch.
- There might be multiple batches that are defined for each application that processes batches in the local mode. For example:
 - One batch might be configured to scan only and then upload the batch to the Datacap File Server system for further processing.
 - One batch might be configured to do all processing locally, scan, indexing, validation, and verification.

FastDoc overview (3)

- Can use the same interface for:
 - Local offline processing and upload.
 - Datacap server mode online processing after upload.
- Can be used as an application configuration tool or client for processing batches.
 - Can switch between development mode and batch processing mode without switching interfaces.
- With the help of built-in templates, you can quickly create and configured applications.
- Can create and save you own custom templates.

FastDoc Local Mode

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Figure 1-11. FastDoc overview (3)

Use Datacap Desktop or Datacap Navigator if you require the following functions:

- Custom Verify panels.
- Line item verification.
- SELECT and Lookup DCO properties for database queries.

FastDoc Terms (1)

FastDoc (Admin)	FastDoc administrative interface. Start>All Programs>Datacap Development Tools>Datacap FastDoc (Admin)
FastDoc	FastDoc user interface. Start>All Programs>Datacap Clients>Datacap FastDoc
Local mode	FastDoc mode for configuring and running local or offline batches.
Datacap Server mode	FastDoc mode for configuring and running Datacap workflows as a Datacap client.

FastDoc Local Mode

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Figure 1-12. FastDoc Terms (1)

FastDoc (Admin)

The administrative interface is for configuring tasks and batches for processing documents batches.

- In the local mode, local batches and tasks are configured.
- In the Datacap Server mode, complete applications are created and configured by using a template or another application as a starting point.

FastDoc – Local mode

All processing is done automatically except where human intervention is required.

Operator intervention is required at the Verify step.

After validation completes at the Verify task, the batch advances through the Export task.

FastDoc – Datacap Server mode

Each defined batch task must be manually initiated.

Scan, Profiler, Verify, and Export.

Background tasks like Profiler and Export can be configured to run automatically with the Rulerunner service.

FastDoc Terms (2)

Batch profiles	An offline workflow that runs in FastDoc Local mode to process a batch through all tasks. When initiated, it processes all tasks in sequence and stops only when operator intervention is required.
Job	A Datacap Server workflow that consists of a number of Tasks.
Task	One step in a job or batch profile.
Task Profile	A sequence of Rulesets that are processed as Mapped to a task.
Batch	A group of documents that are processed together. Also, all of the files that are created in the course of all tasks in a job.

FastDoc Local Mode

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Figure 1-13. FastDoc Terms (2)

Batch profiles

- In the context of FastDoc running in the Local - Offline mode, processing is done in batches rather than task at a time.
 - When you start a batch, FastDoc automatically walks through each task that is defined in the batch until some operator intervention is required.
 - A batch profile is a collection of tasks that are arranged in the order in which the tasks are run.
 - A batch profile usually starts with a Scan task and ends with the task that is configured with the Send to Taskmaster option.
 - Send to Taskmaster option is explained in a later section.

Job

- The tasks that are associated with a job represent all the processing that must be done on a batch of documents to take the batch through the:
 - Source capture phase.
 - Transformation phase.

- Delivery phase.

Task

Examples of tasks might be: Scan, PageID, Profiler, Verify, and Export.

Task Profile

- From the prerequisite Datacap Introduction class, you know that a task profile defines a list of references to rulesets run in a task. Defines what is done on a document batch for each processing step.
- When FastDoc runs in the Datacap Server mode, you run one task at a time.
- Task Profiles are assigned to tasks to define the task process.

Batch

A Batch is a group of pages that are scanned and processed through each Datacap task as an entity. When the entire batch process is complete the result is:

- Pages are assembled into documents and exported to a data repository.
- There is a batch folder on the Datacap Server machine that preserves the history of the capture process.

Demonstrations

- Explore Datacap FastDoc client modes



FastDoc Local Mode

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Figure 1-14. Demonstrations

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

Lesson 1.2. FastDoc local mode

FastDoc local mode

FastDoc Local Mode

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Figure 1-15. FastDoc local mode

Lessons

- FastDoc Overview
- ▶ FastDoc local mode
 - Create a local capture batch
 - Process local batches
 - Configure Scan and Upload

FastDoc Local Mode

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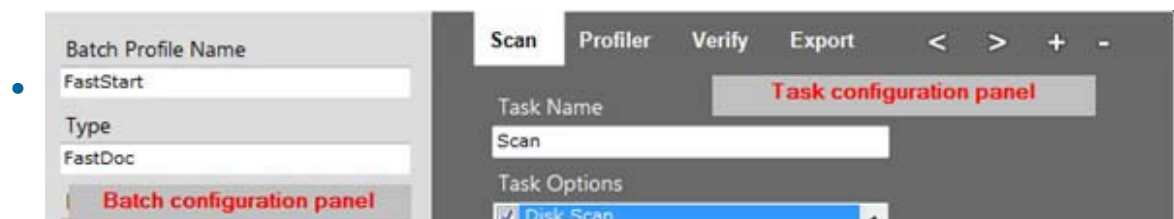
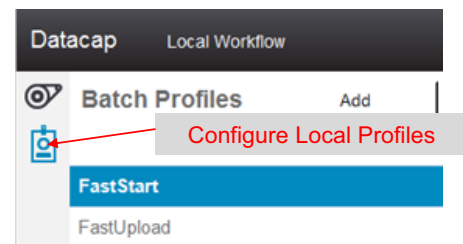
Figure 1-16. Lessons

Why is this lesson important to you?

- As a Datacap business analyst, you might be required to configure FastDoc to process batches completely or partially on the local system before uploading the batches to the server for further processing.
- To do these tasks effectively, you must be familiar with the FastDoc Local mode interface.

FastDoc Local Batch Configuration

- Batch Profiles are only needed in the FastDoc Local mode.
- Batch Profiles are equivalent to Jobs in Datacap Server terms.
- Create local batches in the FastDoc (admin) Local mode.
 - On the Batch Profiles sidebar, click Configure local profile.
- Configure the batch parameters.
- Create a task for each step that you process in the Local mode.



FastDoc Local Mode

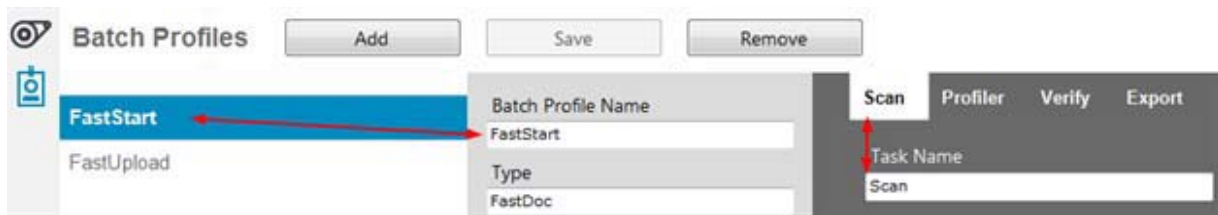
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Figure 1-18. FastDoc Local Batch Configuration

Configuring applications in Local mode

- Start FastDoc (Admin)
- Click Configure local profile
- Click Local
- Click Login
- To Add a new batch click Add and define the new batch parameter.
- To edit an existing batch, click the batch and edit the parameters directly.
- Click Save to preserve your changes when editing is complete.

Configure Local Batch Profiles



- Batch toolbar
 - Batch shortcut name follows the Batch Profile Name
 - Use Add to create another batch.
 - Use Remove to delete a batch.
 - Use Save to preserve configuration changes

FastDoc Local Mode

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Figure 1-19. Configure Local Batch Profiles

Help path.

- Datacap > Datacap 9.0.1 > Customizing and running Datacap applications > Preparing and running FastDoc applications > Application configuration on FastDoc > Setting up batch profiles in Local mode

Configure the Batch Parameters

- Batch Parameter pane
 - Batch Profile Name.
 - Type
 - Description
 - Batch ID Format
 - Document ID format
 - Page ID Format
 - Format descriptions:
 - c – Computer name
 - Y – four-digit year
 - m – two-digit month
 - d – two-digit day of month
 - n3 – three-digit batch counter
 - BID2 – Batch ID
 - tm fixed text
 - doc#2 – two-digit document number in the batch
 - n6 – six-digit image count within the batch

The screenshot shows a configuration window titled 'Batch Parameter pane'. It contains several fields with labels and values:

- Batch Profile Name:** FastStart
- Type:** FastDoc
- Description:** (empty field)
- Batch ID Format:** [c][Y][m][d].[n3]
DCCLIENT20141124.000
- Document ID Format:** [c].[BID2].[doc#2]
DCCLIENT..00
- Page ID Format:** tm[n6]
tm000000

FastDoc Local Mode

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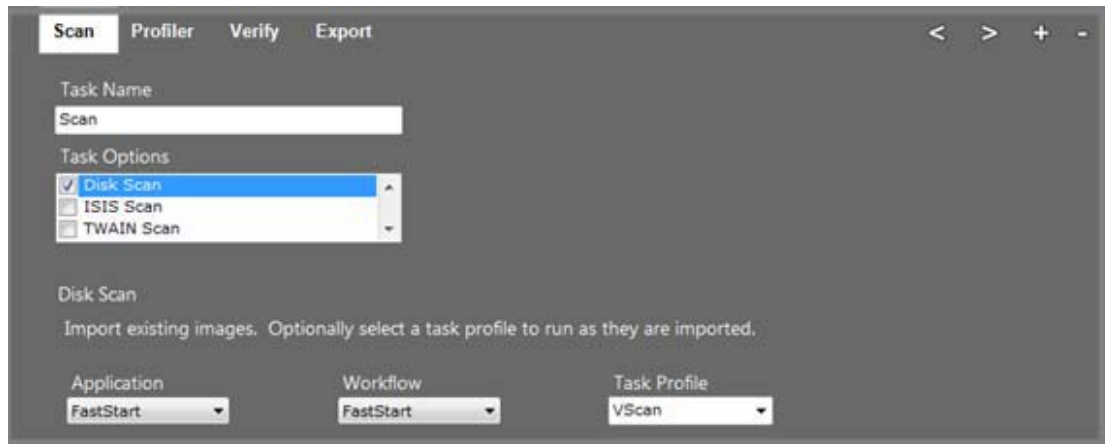
Figure 1-20. Configure the Batch Parameters

- The entries on this pane determine the parameters for a Batch Profile:
 - The Shortcut name (Batch Profile Name) that starts the execution of the batch in the FastDoc Local mode.
 - The name (Batch ID) and location (Batch Profile Name) of the batches folder.
 - The name that is used for task-related files in the batches folder. (Document ID)
 - The name that is used for image files in the batches folder. (Page ID)
- Batch Profile Name
 - Used for the batch folder name in the FastDoc > batches folder.
C:\Datacap\FastDoc\<Batch Profile Name>\batches\<date>.<num>
 - Used for the Batch Shortcut name that is used to start the batch in the Local mode interface.
 - Coincidentally it is the same name as the Datacap Application name.
- Type
 - Identifies the Document Hierarchy (DCO) that this batch is associated with.
 - This field must match the DCO type or Batch structure name.

- Description.
 - Any descriptive definition.
- Batch ID Format- rules for the folder names
 - Defines the batch folder name.
 - Batch folder is where batch history is accumulated as tasks are processed.
- Document ID Format - rules for document names
 - Document number to append to the BID if there are multiple documents in the batch.
- Page ID Format - rules for page names in the batch

Configuration Local Tasks

- Provide a task name
- Task Options
- Configure more parameters



FastDoc Local Mode

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Figure 1-21. Configuration Local Tasks

Help path

- Datacap > Datacap 9.0.1 > Developing applications > Custom Datacap Report Viewer reports > Datacap statistics

http://www.ibm.com/support/knowledgecenter/SSZRWW_9.0.1/com.ibm.dc.customrv2.doc/dcap000.htm?lang=en

Configuring Local Tasks

- Task Name is displayed on the task tab. There is a tab for each Task defined.
- Task toolbar options
 - < > Left and Right. Use these controls to order the task menu tabs.
 - + Plus sign to add a task.
 - - Minus sign to remove a task.
- Task options are:
 - Disk Scan
 - ISIS Scan

- TWAIN Scan
- Send to Datacap
- Verify
- Rulerunner
- Start Batch Panel
- Task Option parameters.
 - Each task option that you can select has a unique set of parameters that you provide.
Examples of required parameters are:
 - Application name
 - Workflow name
 - Task Profile name
 - Job name, task
 - Batch Folder
 - Statistics Table. See the IBM Knowledge Center help link.

Two FastDoc workstation configurations

- On the same LAN as the Datacap Server.
 - Application Manager > Service* = \\<Server>\Datacap\datacap.xml
 - The application is installed on the Datacap Server.
 - Upload batched with the Upload Batch Profile
- At a remote location only accessible over the internet.
 - Application Manager > Service * = C:\Datacap\datacap.xml
 - The copy of the Server application is installed on the remote FastDoc workstation.
 - Upload batched with the Web Client Upload Service.



- The Application Manager Service * parameter sets the application location.

Figure 1-22. Two FastDoc workstation configurations

On the same LAN as the Datacap Server.

- The Application Manager > Service Tab > “Path to the application manager file” parameter, is set to \\<Server>\Datacap\datacap.xml
 - The Application and Workflow parameters reference an application that is configured on the Datacap Server.
 - Upload batches to the Datacap Server with the Upload Batch Profile.
 - The offline configuration Task Option “Send to Datacap” has a Batch Folder parameter.
 - If the Batch Folder parameter is set, then upload batches go to the location on the server that the Batch Folder parameter specified.
 - If the Batch Folder parameter is not set, then the upload destination is determined by concatenating the following entities. Application Manager > Service “Path to application manager file” + Application that is selected on the Send to Datacap task option + batches.
- Example: \\<Server>\Datacap\<application>\batches

At a remote location only accessible over the internet.

- The Application Manager > Service Tab > “Path to the application manager file” parameter, is set to C:\Datacap\datacap.xml
- The Application and Workflow parameters reference a copy of the server application that is installed in the remote FastDoc workstation.
- Upload batches to the Datacap Server with the Web Client Upload Service.

Create and run local batches

- Local Mode
 - Click a batch profile name under New Batch to create a batch.
 - Double-click an Existing batch.



FastDoc Local Mode

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Figure 1-23. Create and run local batches

Local Mode

- In the local mode, FastDoc runs all defined tasks automatically until a step is reached that requires operator intervention.
- The results of the FastDoc Local processing are presented in one of two ways dependent on the configuration of the Local tasks.
 - Complete processing is done under FastDoc and the results are placed on the destination repository as defined in the FastDoc Export step.
 - FastDoc batches are on the client system where FastDoc is installed at C:\Datacap\FastDoc\Batches\<Batch Profile Name>\<Batch Folder>. At the point that the Send to Datacap Task Option is encountered, a Batches Folder is created on the Datacap server system where the Datacap Batches are stored at <Datacap Server>\Datacap\<Application>\Batches\<Batch Folder>
- At any time, an operator can place the batch on hold mode. An entry is made on the Existing Batches list so that the batch can be restarted later.

Demonstrations

- Explore Datacap FastDoc Local Mode



FastDoc Local Mode

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Figure 1-24. Demonstrations

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 local mode

Requires:
Course Exercise Guide
Student system

FastDoc Local Mode

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Figure 1-25. Exercise: FastDoc local mode

Exercise objectives

- Explore FastDoc local mode.



FastDoc Local Mode

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Figure 1-26. Exercise objectives

Lesson 1.3. Create a local capture batch

Create a local capture batch

FastDoc Local Mode

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Figure 1-27. Create a local capture batch

Lessons

- FastDoc Overview
- FastDoc local mode
- ▶ Create a local capture batch
 - Process local batches
 - Configure Scan and Upload

FastDoc Local Mode

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Figure 1-28. Lessons

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. You might be called on to configure remote site for scanning and uploading document batches to the Datacap Server.
- To do this operation, you must be familiar with using the FastDoc user interface in the local run mode to capture documents of a known type.

FastDoc Local Mode

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

Define terms

- Local refers to the machine on which FastDoc is installed.
- FastDoc Client Workstation refers to the workstation where FastDoc is installed.
 - It might be on the same local area network as the Datacap Server.
 - It would normally be run in Datacap Server mode.
 - It might be at a site remote from the Datacap server.
 - It would normally be run in local mode.
- Local or Offline mode
 - Refer to a mode where capture tasks are run on the machine where FastDoc is installed.
 - At some point, the local batches are uploaded to the Datacap Server.
 - FastDoc can be used to scan directly to a repository without ever uploading to a Datacap Server.

Figure 1-30. Define terms

FastDoc might be used with the Datacap Client Upload Service to upload to a Datacap Server at scheduled times or when the server is available. Scheduled upload times are useful in WAN situations with low or expensive daytime network availability.

What is a Local Batch Profile?

- It is a collection of tasks that are used to process a batch on the local machine.
- The batch profile on the configure page defines:
 - How to name the batch.
 - How to identify sequential batches.
 - How to name captured page files.
- A local batch has a defined task for each step that is run on the local machine.
- If all processing is on the local machine, the last task exports the documents to a repository.
- If a batch is only partially processed in the local mode, then the last task uploads the batch to the server for further processing.

Figure 1-31. What is a Local Batch Profile?

- The batch data is maintained on the local FastDoc machine until the batch is uploaded to the Datacap Server.
- The batch data location on the local machine is: C:\Datacap\FastDoc\<appname>\batches

What is a Local Task?

- The tasks that are defined in the batch profile point to profiles already configured in an existing application.
 - There is a task defined for each task that is run on the local machine.
- Each task is either defined as:
 - A Verify task by selecting the Verify task option.
 - Example: Verify task
 - A Profiler task by selecting the Profiler task option.
 - Examples: PageID, Profiler, Export.
- The application might be on:
 - The Datacap Server.
 - The Local Client Workstation

FastDoc Local Mode

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Figure 1-32. What is a Local Task?

- The task that does the upload operation defines where the batch is placed on the Datacap server.
- The Send to Taskmaster task option defines the server batch destination. This topic is covered in the next lesson.
- If no path is defined in the Batch Folder field of the Send to Taskmaster option, then the path that is defined in the Application manager is used.
- At the point of uploading the batch to the Datacap server, the local copy becomes redundant.
- It is an administrative task to monitor and remove the redundant batch data before it uses up the FastDoc client machine storage resources.

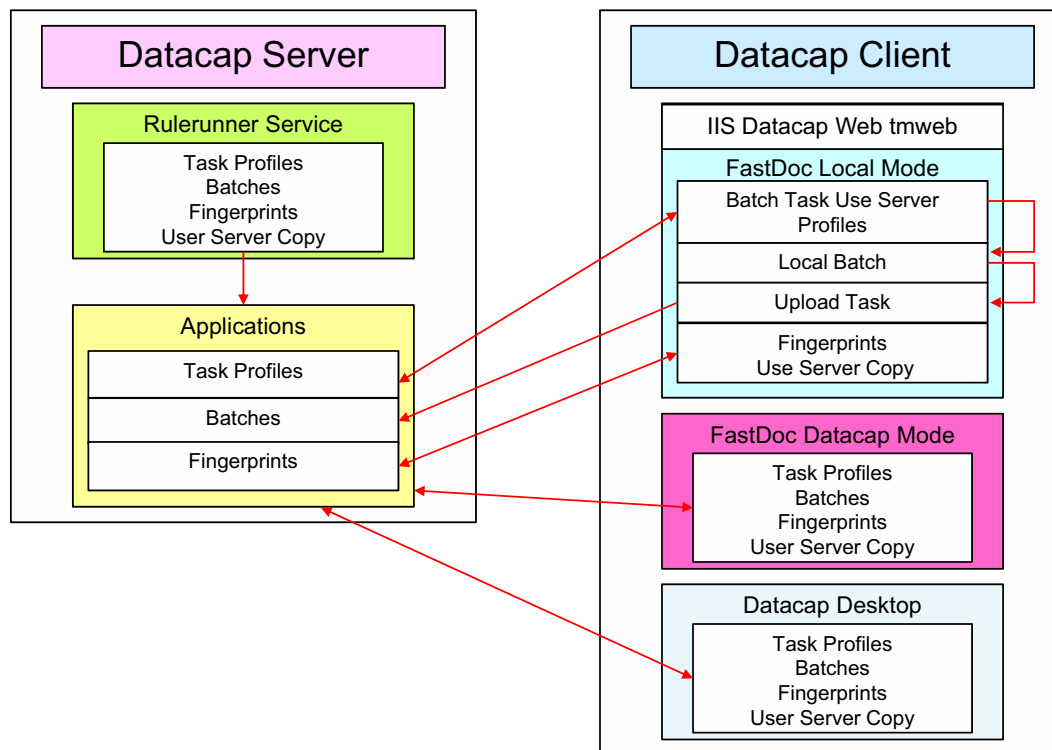
Location of Application that is run in FastDoc Local mode:

- If the Client is on the same LAN as the server, then the application that the Local Batch Profiles references is on the Datacap Server.
- If the Client is on remote LAN from server with only WAN access to the server, then the application is on the client or another local machine.

When is a Local Batch Profile required?

- A local batch profile is required when any capture processing is planned on the FastDoc client machine in the Local mode.
 - When a local batch profile is built for an application; it should not be necessary to access it again.
 - The only possible causes for changing the initial configuration for a specific application are:
 - If you want to adjust the file and folder name configuration parameters.
 - If processing for the application changes so that another task is added.

Where is data located?



FastDoc Local Mode

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Figure 1-34. Where is data located?

The slide diagram shows where task profiles, batches, and fingerprints are stores.

Server Object Location

Objects - Where located

Datacap Server - ecmedu01

Applications - \\ecmedu01\Datacap\<application>

Batches - \\ecmedu01\Datacap\<application>\batches\<batch folders>

By default when Datacap Desktop, Rulerunner, Datacap navigator, and FastDoc when it is run in Datacap Server mode, create batches they are placed here.

Also uploaded batches from tmweb and FastDoc offline mode can also be placed here.

Fingerprints - \\ecmedu01\Datacap\<application>\fingerprints

Task Profiles - \\ecmedu01\Datacap\<application>\dco_<application>

Datacap Client - dcclient

FastDoc - \\dcclient\Datacap\FastDoc

Local Batches - \\dcclient\Datacap\FastDoc\batches\<application>\<batch folders>

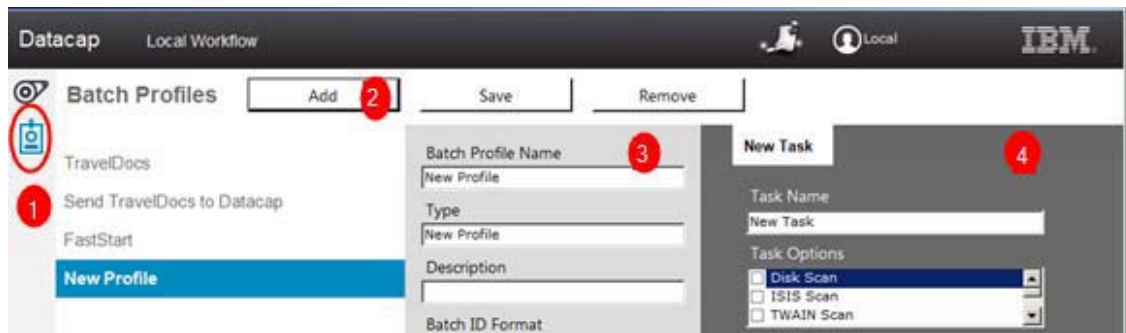
Fingerprints - Use the Server Fingerprints

Local Batch Profiles - \\dcclient\Datacap\FastDoc\BatchProfile.xml

All configuration that is done on the setting window is stored in this file.

These Local Batch Task objects reference the task profiles on the server.

Configure local batches



- Select the Configure local profile view.
- Use Add to create another batch.
- The Batch Profile Name defines the Batch tab name.
 - The Batch Profile Name is also used to create a batch folder structure:
 - C:\Datacap\FastDoc\<Batch Profile Name>\batches\<date>.<num>
- Use Remove to delete a batch.
- Use Save to save any changes.

FastDoc Local Mode

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Figure 1-35. Configure local batches

Configure local profiles view toolbar

- Add – Add an offline batch
- Save – Save configuration changes
- Remove – Remove a defined local profile

Left pane

- List of batch profile links

Center light gray pane

- Batch profile parameters

Right dark gray pane

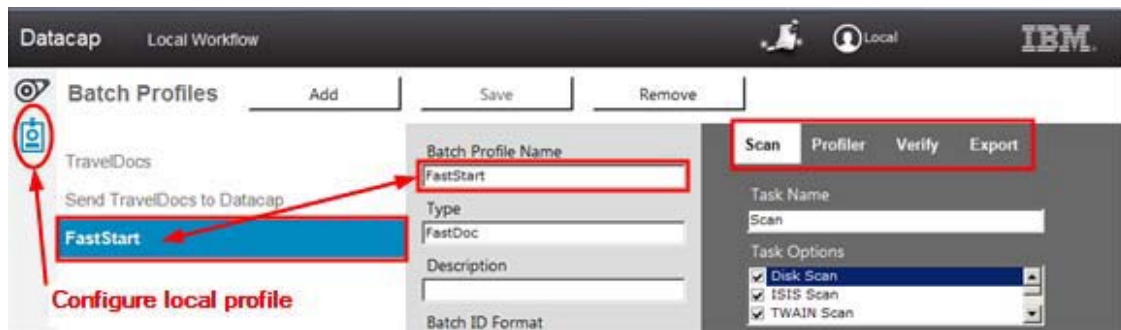
- Task configuration options and parameters

Batches and Tasks

- Applications can be configured to recognize and process multiple different documents.
- Usually you create a batch profile for each application processed.

- There might possibly be multiple batch profiles that are defined for an application.
 - Example: One to process all tasks offline. One to Scan and then Upload.
- A batch profile defines all of the tasks that must be done before the batch is uploaded to the Datacap server
- You can do any number of tasks in the Local mode before sending the result to Datacap server.
- As soon as the Send to Taskmaster Task Option is encountered in a task, it signifies the end of the local processing.
- All remaining tasks are done on the Datacap server.
- FastDoc and any other Datacap client can be used to process the tasks on the Datacap server.
- The Rulerunner server can be configured to run any task that does not require intervention.

FastDoc (Admin) local configuration interface



- There is normally only one batch profile per application.
- One batch link for each defined batch.
 - One click the batch link causes all of the associated tasks to run.
 - The batch profile name defines the batch Shortcut name.
- Order of processing
 - They run in the order defined. Scan, Profiler, Verify, and Export.
 - Processing pauses only when user action is required. Scan and Verify

FastDoc Local Mode

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Figure 1-36. FastDoc (Admin) local configuration interface

One batch profile per application

- There is normally only one batch profile shortcut for each application that is configured to process in the local mode.
- The reason for a single shortcut per application is that all tasks run automatically after the batch scan task is initiated.

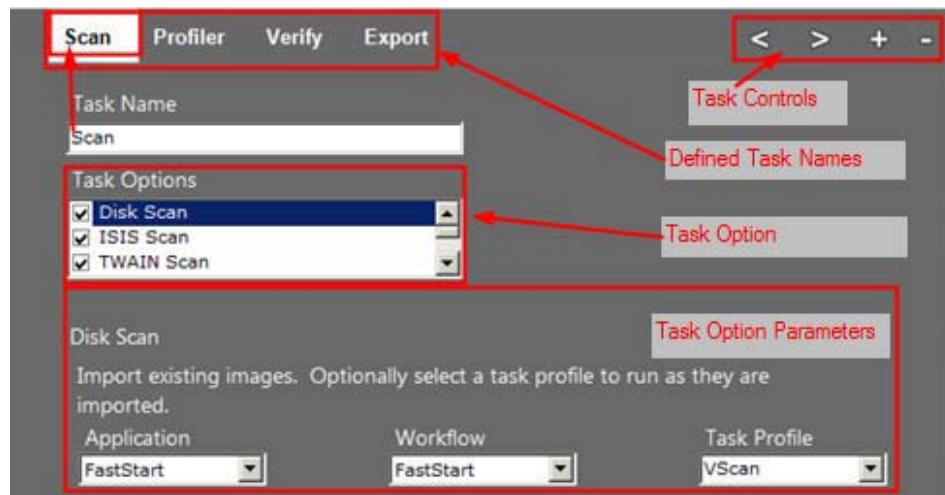
Local batch profiles are configured on the Configure local profile view.

- Configure local profile view can be accessed only from the FastDoc (Admin) interface.
- The administrator configures the local profiles for the users.
- Configuration that is done on the Configure local profile view defines local batch profiles.
- Users run the FastDoc (User) interface in the local mode.
- No Datacap enforced security prevents a user from running FastDoc local mode.
- The Administrator can set security on the C:\Datacap\FastDoc folder to limit access.
- The FastDoc batch profiles can be duplicated across FastDoc client machines by copying the file C:\Datacap\FastDoc\BatchProfiles.xml.

Difference between processing Online and Offline

- The location of the batch temporary files.
 - Local Batches - \\<**local machine**>\Datacap\FastDoc\batches\<application>\<batch folders>
 - Batches - \\<**datacap server**>\Datacap\<application>batches\<batch folders>

Batch task pane



- Task Name is displayed on the taskbar.
 - There is a tab for each task that you define.
 - Only the batch name is visible to user at run time.
- Task toolbar controls, add, remove, or sequence batch tasks.

FastDoc Local Mode

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Figure 1-37. Batch task pane

The order in which tasks are arranged determines the order of processing.

Sequencing batch tasks.

—< > Left and Right. Use these controls to order the task menu tabs.

—+ Plus sign to add a task.

— Minus sign to remove a task.

Task Options

These options are the configuration options available for configuring the tasks.

- Disk Scan (optional, required if scanning digital images)
 - Import existing images.
 - Run the selected task on all images as they are imported. This task might be used for converting documents to TIFF.
- ISIS Scan - Scan batches from an ISIS scanner device.
- TWAIN Scan - Scan batches from Twain scanned device.

- Start Batch Panel
 - This option is used with the Scan options to cause the Start Batch Panel to be displayed to control importing.
- Verify - Identify a Verify task.
- Rulerunner
 - Identify Rulerunner tasks. (PageID, Profiler, and Export)
- Send to Taskmaster
 - The batch folder setting under upload is optional and if omitted the one in the application file is used.

Configure more parameters

- Each task option has a unique set of required parameters.

Task Options and associated Parameters

In this topic, the first-level bullet shows the options that can be selected for each task type and the second-level bullets (-) define the parameters that can be selected for each option.

Scan Task Configuration Options

- Disk Scan (optional, required if scanning digital images)
 - Application = <app name>, Workflow = <workflow name>, task = VScan (optional)
- ISIS Scan (optional, required if scanning with an ISIS scanner)
- TWAIN Scan (optional, required if scanning with a TWAIN scanner)
- Start Batch Panel
 - Application = <app name>, Workflow = <workflow name>

Profiler Task Configuration Options

- Rulerunner
 - Application = <app name>, Workflow = <workflow name>, task = Profiler

Verify Task Configuration Options

- Verify
 - Application = <app name>, Workflow = <workflow name>, task = Verify

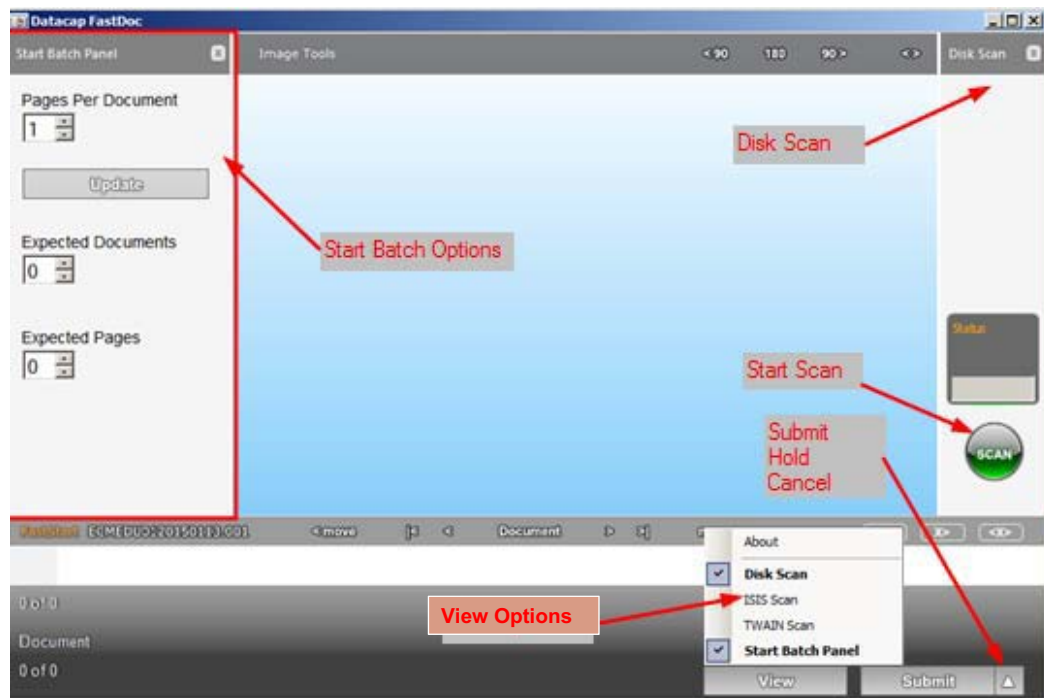
Export Task Configuration Options

- Rulerunner
 - Application = <app name>, Workflow = <workflow name>, task = Export

Upload Task Configuration Options

- Send to Taskmaster
 - Application = <app name>, Job = Main Job, Statistic Table = scan2kst
 - Batch Folder = \\ecmedu01\Datacap\ExpenseDemo\batches

Scan Interface



- You see the Scan interface when you start scanning.

FastDoc Local Mode

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Figure 1-38. Scan Interface

Introduction

After the Batch profile and Task configuration is complete, you can start processing document batches with FastDoc. You see a similar interface when processing batches in Local - Offline mode or Taskmaster - Online mode.

Start Batch Panel option

The following options help to separate batches of pages into documents.

- Pages per Document
 - If all documents have the same number of pages, then quickly use this option to group pages into documents.

- Update

Separate pages into documents with the Pages per Document value.

- Expected Documents

The following option specifies the total number of documents in the scan batch.

- Expected Pages
 - This option specifies the total number of pages in the scan batch.
 - Note: The Expected documents and pages values are saved to batch variables. Rules can be used to route the batch for fixup if the actual numbers do not match.

View options

- Used to access Help, Access information about the software release, and the select the type of Scan panel that is displayed of the right side pane.
 - Help - Display Help information.
 - About - Display information about the software release,
 - Disk Scan - Default Scan interface that is displayed on the right side pane.
 - ISIS Scan - Select this option to display the ISIS Scan interface on the right side pane.
 - TWAIN Scan - Select this option to display the TWAIN Scan Interface on the right side pane.

Note: The Disk Scan, ISIS Scan, and TWAIN Scan are only displayed on the View list if the check box for these options were selected when configuring the Batch Scan Task. See the Scan Task Configuration Options on the previous slide.

Completion actions

- There are three possible completion actions:
 - Submit - Complete the Scan task and allow processing to continue to the Profiler task.
 - Hold - Suspend the batch at the Scan step.
 - Cancel - Cancel the Scan and all subsequent tasks.

Scan Panels



- The scan interface looks different depending on scan source option that is selected.

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Figure 1-39. Scan Panels

Scan interfaces for Disk Scan, ISIS Scan, and TWAIN Scan.

- Disk Scan - Scan Creates a batch from documents that are previously scanned or faxed.
- ISIS Scan - Select Source Creates a batch from images that are scanned with an ISIS scanner.
- TWAIN Scan - Select the TWAIN source Creates a batch from images that are scanned with a TWAIN scanner.

ISIS TWAIN Differences

- ISIS scanner drivers provide consistent functions across a wide variety of scan devices.
- TWAIN scanner drivers provide more specialized functions.

Demonstrations

- Configure a local batch profile



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Figure 1-40. Demonstrations

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: Create a local capture batch

Requires:
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Student system

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Figure 1-41. Exercise: Create a local capture batch

Exercise objectives

- Configure a local batch.



Lesson 1.4. Process local batches

Process local batches

FastDoc Local Mode

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Figure 1-43. Process local batches

Lessons

- FastDoc Overview
- FastDoc local mode
- Create a local capture batch
- ▶ Process local batches
- Configure Scan and Upload

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Figure 1-44. Lessons

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. You might be called on to configure remote site for scanning and uploading document batches to the Datacap Server.
- To do this operation, you must be familiar with using the FastDoc user interface in the local run mode to capture documents of a known type.

FastDoc Local Mode

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Figure 1-45. Why is this lesson important to you?

Scan batch preparation

- Scan task is the first step in Document capture
- Batch content
 - Physical paper is scanned with an ISIS or TWAIN scanner
- Electronic documents that are received through:
 - Fax, email, previously scanned images.
- Scan preparation
 - Documents match the Datacap application
 - For paper batches:
 - Arrange page groups for multi-page documents.
 - Add separator pages if necessary
 - For electronic batches, know the location:
 - Single folder
 - Multiple batches from different folders

FastDoc Local Mode

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Figure 1-46. Scan batch preparation

- The Scan Task is the first step when capturing and processing batches of documents.
- Batch content might be physical paper pages that are scanned with a scanner.
- Content might also be pages that are received through:
 - Fax.
 - Email.
 - Images that were previously scanned and placed in a specific image folder for Datacap processing.
- Make sure that documents are the correct type for the application that is used to scan them.
- If scanning paper documents:
 - Arrange pages into document groups if multi-page documents.
 - Add document separator pages if necessary.
- If processing graphic images, make sure that you know the location.
 - In one folder
 - Multiple batches from different folders

Start a batch in local mode

- Start either FastDoc (Admin) or FastDoc
 - Click Local and Login.



- Click the batch name
 - (for example, ExpenseDemo) for the batch to run.

FastDoc Local Mode

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Figure 1-47. Start a batch in local mode

Fast Start Application

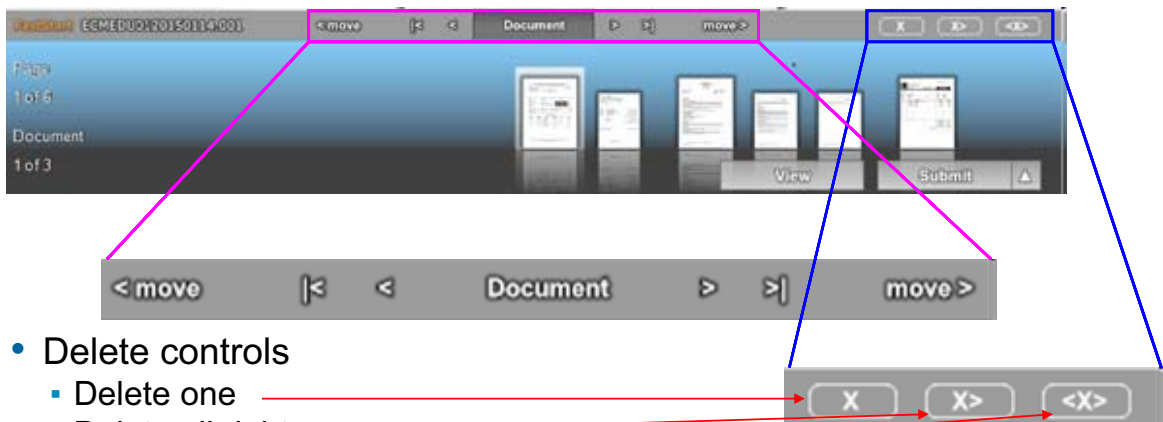
- For the exercise, you use the ExpenseDemo application.
 - It was created from standard DC8.1 FastApp application template
- The application is configured with four basic tasks.
 - Scan, Profiler, Verify, and Export
- It is configured to recognize three document types
 - Fingerprints were saved for each document type.
- Location rules were defined for locating and extracting data.
- Some validation rules were configured to do field data checks.
- Local batch tasks are configured to use the same task profiles as online processing.

Scan the batch

- Scan to start scanning



- Document controls and image strip



- Delete controls
 - Delete one
 - Delete all right
 - Delete all

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Figure 1-48. Scan the batch

After the Scan interface opens:

- Click Scan to select the images for scanning.
- Browse to and Select one or more images.
- Click Open to start the scan process.

Thumbnail images of each scanned page are displayed on the thumbnail strip.

- The first image is placed in center of the blue background pane of the Scan window.
- The first image is highlighted on thumbnail strip.

Move and select image controls

Use **<move and move>** to move the selected page left or right.

Use **<| and >|** Go to first page and Go to Last page.

Use **< and >** Go to Previous and Go to Next

Use **Document** to define the selected page as the first page of a document. The tile size increases.

Delete controls

Delete only the selected image

Delete the selected image and all images to the right of the selected.

Delete all images.

Process the batch

- Start profiler.
 - Click Submit on the Scan window to initiate the Profiler task.
- Processes that the profiler task performs are:
 - Fixing images
 - Recognition
 - Locate the Data
 - Populate the Data
- Fields that fail validation rules are flagged for operator review during the verify task.

FastDoc Local Mode

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Figure 1-49. Process the batch

Completing the scan task initiates the profiler processing task.

- Click Submit to complete the Scan task after doing all necessary document manipulation.
 - In Local mode, the Profiler task or next sequential task starts to run.
 - In Datacap Server mode, Scan task ends and Profiler or next sequential task must be run manually.
 - Problems are identified in the profiler task and flagged for the operator to review when the verify task is run

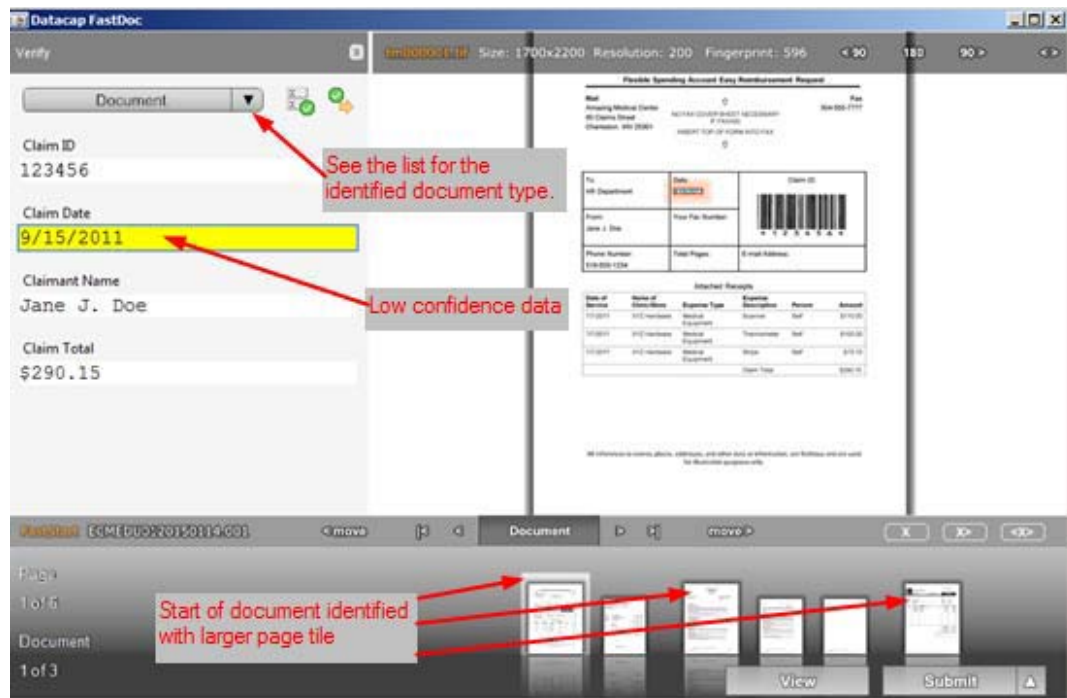
All processing that is done in profiler task is part of standard processing that is built in to the application template.

Some additional basic configuration is done for the three document types that are processed in this lesson.

The following are the processing phases for the Profiler task:

- Fixing images
 - Do image alignment, despeckling, and so on, to improve image quality.
- Recognition
 - Identify pages by comparing them to saved fingerprints.
- Locate the Data
 - Use configured locate rules to locate and extract image data fields.
- Populate the Data
 - Populate verify form fields with extracted data.

Verify the batch



- When the Profiler completes, the Verify window is displayed.

FastDoc Local Mode

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Figure 1-50. Verify the batch

The verify interface is where Quality assurance of the scanned data occurs.

When profiler processing is complete, the Verify window is displayed.

- The Verify window opens with:
 - A tabular Verify panel that displays the extracted values.
 - The full image in the right side pane.
 - The Thumbnail strip across the bottom.
- Verify that the Window Data Panel displays the current document.
 - It was identified with a previously defined fingerprint.
- Extracted properties are displayed in verify/data entry screen in a tabular layout.
 - The Claim Date field has a yellow background that indicates low confidence data.
 - Fields without data are displayed with a pink background.

- The Thumbnail Strip is across the bottom of the Verify window.
 - Pages are grouped into documents. The first page has a larger icon.
 - First document that has a flagged field is highlighted in the page thumbnail strip.
 - You can select a page of the batch by clicking its thumbnail.

Correct errors

Document

Invoice Number
0014879

Invoice Date
02/15/10

PO Number
013125

Vendor Zipcode
57501

The Vendor Zipcode field contains 0 characters. ...

Vendor Name

Terms
2/10Net30

Document

3 of 3

XYZ Hardware

60 Shovel Rd
Pine, SC 29501

Phone: 605-555-6789
Fax: 605-555-6788

Invoice No. 0014879

Customer:

Name: Ralph R. Anderson
Address: 55 Unbroken Road
City: Montgomery State: AL ZIP: 36101
Phone: (204) 555-1111

Misc:

Date: 02/15/10
Order No. 738939
PO# 013125
Terms 2/10Net30

QTY	Item	Description	Unit Price	TOTAL
1	1000-XX	2100 HVAC system 32g	2100.00	2100.00
1	1100-MM	Coupling	3.00	3.00
1	3200-MM	Diverter	500.00	500.00
1	13001-AB	Delivery	400.00	400.00
1	Discount	Pre discount	-1100.00	-1100.00

Reason for error

- Complete missing fields with click'n'key.

FastDoc Local Mode

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Figure 1-51. Correct errors



- The Verify task flags potentially problematic fields based on
 - character interpretation,
 - confidence,
 - data validation rules,
 - empty data fields, and so on
- Missing data fields display with a pink background.
 - The message after the field displays a reason for the verify failure.

Provide Missing Data or Correct Erroneous Data

- Click'n'Key Data retrieval.
 - Select the empty field in the Verify Data panel.
 - For a single word or contiguous data field, click the corresponding field on the image.
 - If the field on the image has multiple words, then draw a box around the area to select all of the words.

- Alternatively, type in missing data for fields that need to be corrected.
- Note: Use keyboard shortcuts to zoom or pan
- After the user provides or corrects data, the changed data is revalidated.
- If user submits a page, the interface advances to the next page with a problem.

Export the batch

- Validate Changed Data
 -  Run the validation rules after providing missing data or correcting fields.
- Submit Pages
 -  Submit changes advances the process to the next page that has a suspected problem.
- The export task runs automatically after the last verify problem is resolved
- At the point when export completes on local machine,
 - Batch is in C:\Datacap\FastDoc\batches\<app name>\<batch folder>
- After Upload, batch is transferred to server and placed in
 - \Network\<Datacap Server>\Datacap\<app name>\<batch folder>

FastDoc Local Mode

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Figure 1-52. Export the batch

When you click **Submit** after the last problem is resolved:

- In the Local mode, the verify task ends and the Export task starts.
- In the Datacap Server mode, the Verify step completes and the batch is set as pending on the Export task.

The Export files are in the batches folder because no Export configuration is done on the ExpenseDemo application.

In a later exercise you configure the Export files to be placed in:

- A specific Exports folder on the Datacap Server machine.
- The Enterprise Content Manager (ECM) repository on the IBM FileNet P8 Content Engine.

Demonstrations

- Process documents in local mode



FastDoc Local Mode

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Figure 1-53. Demonstrations

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: Process local batches

Requires:
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Student system

FastDoc Local Mode

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Figure 1-54. Exercise: Process local batches

Exercise objectives

- Process documents in local mode.



FastDoc Local Mode

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Figure 1-55. Exercise objectives

Lesson 1.5. Configure Scan and Upload

Configure Scan and Upload

FastDoc Local Mode

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Figure 1-56. Configure Scan and Upload

Lessons

- FastDoc Overview
- FastDoc local mode
- Create a local capture batch
- Process local batches
- ▶ Configure Scan and Upload

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Figure 1-57. Lessons

Why is this lesson important to you?

- As a Datacap business analyst, you build and deploy applications with the Datacap Capture system. You might be called on to configure remote site for scanning and uploading document batches to the Datacap Server.
- To do this operation, you must be familiar with using the FastDoc user interface in the local run mode to capture documents of a known type. You must also know how to configure an Upload shortcut with FastDoc.

FastDoc Local Mode

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Figure 1-58. Why is this lesson important to you?

Add an Upload Batch

- When is an upload task required?
 - When some processing is local and the rest is central.
 - If you want to configure FastDoc as a remote scan station.
- The upload task is created in the FastDoc (Admin) Local mode.
 - Start the FastDoc (Admin) interface.
 - Select local mode and log in.
 - Click Add to define a new batch.
 - Configure the Batch profile parameters. (Covered in lesson 1.3)

FastDoc Local Mode

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Figure 1-59. Add an Upload Batch

Add an Upload Task

When to use

- An Upload Task is required in any Scenario where you do some processing in the FastDoc Local mode and then upload the batch to the Datacap server to complete the processing.
- If you did all of your processing on the local workstation, then you would typically upload following the Export task.
- By convention upload happens at the end of the last defined Local batch task.
- The remainder of the processing is done on the Datacap server.

Before you begin

- You must start the FastDoc (Admin) interface to define new batch tasks.
- You can start FastDoc (Admin) in the Local - Offline mode.
- Because you are configuring the upload task in the Local – Offline mode, you are forced to provide login credentials when you define the Send to Datacap Server step.

Batch profile tasks configuration options

- Where you configure local batch tasks
- On this pane you configure:
 - A task for each task that must run in the FastDoc machine.
- For each task you configure:
 - Task name
 - Task options
 - Application to connect to
 - Workflow name
- Arrange tasks in order of processing.
- FastDoc runs tasks in the order that they are defined.

FastDoc Local Mode

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Figure 1-60. Batch profile tasks configuration options

What is a batch profile task?

The batch profile task interface is where you configure batches and tasks that are used for local batch processing with FastDoc. The batch and task configuration is done on the Settings window.

- A term batch in this context is group of tasks that define the processing that is done when documents are captured in the offline mode.
- Not to be confused with the term batch that refers to a group of documents that are all processed at the same time.
- The Batch profile task defines the task name, options, which application, and workflow are used to process the task. Examples: Scan, Profiler, Verify, and Export.
- A Batch profile task is defined for each task that is run on the batch in the Local - Offline machine.
- Batch profile tasks must be arranged in the order in which they are run.
- When the batch is initiated, FastDoc processes all of the tasks in the sequence in which they were defined.

Batch Tasks Profile Examples:

These tasks names are examples of task that might be included in a batch.

- Scan - defines the scan task for import of electronic images from a physical scanning device.
- Profiler - defines image cleanup, page recognition (OCR), and validation tasks.
- Verify - provides an interface that is used to review and update field data.
- Export - moves documents to a supported repository.
- Upload - Transfers batches to the Datacap server.

Configure the Upload Task

ScanUpload

Task Tab and Control < > + -

Task Name
ScanUpload

Task Options
☐ ISIS Scan
☐ TWAIN Scan
☒ Send to Datacap

Send to Datacap
 Create a batch in Datacap after performing offline tasks.

Application: FastStart Job: Main Job Statistics Table: scan2kst
 Batch Folder: c:\Datacap\FastStart\batches

- Name the task. Example (ScanUpload)
 - Configure DiskScan option
 - Configure Send to Disk option
 - Configure Start Batch Panel option

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Figure 1-61. Configure the Upload Task

In the Task pane type, enter the Task Name. Example: ScanUpload.

Configure the Scan Task options.

- Select the Disk Scan option in the Task Options pane.
- Select the Application and Workflow. Example ExpenseDemo

Configure the Send to Taskmaster Task options.

- Select the Send to Taskmaster Task option in the Task Options pane.
- When you select the Send to Taskmaster option, you are prompted to provide log in credentials.
 - Select Application: ExpenseDemo, Job: Main Job, and Statistic Table: scan2kst.
 - The Batch Folder is the folder on the Datacap server where the batch should be placed. Example \\ecmedu01\Datacap\ExpenseDemo\batches
 - If the batch folder is left blank, the folder that is specified in the application manager is used.

Configure the Start Batch Panel Task options.

- Select the Start Batch Panel option in the Task Options pane.
- Select Application and Workflow. Example ExpenseDemo. Optionally select a Task Profile Scan.

Demonstrations

- Configure Scan and Upload tasks for a local batch profile



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Figure 1-62. Demonstrations

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 scan and upload

Requires:
Course Exercise Guide
Student system

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Figure 1-63. Exercise: Configure scan and upload

Exercise objectives

- Configure a scan and upload task.



Unit summary

After completing this unit, you should be able to:

- Identify the operating modes of Datacap FastDoc.
- Configure batches for off line processing.
- Scan and upload a batch



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