1. Introduction

The main Capsure Application gives the ability to:

Ensure that all the software and any purchased licenses are installed correctly. (See Installation Guide).

Users cannot access any Capsure application until they been created with the correct permissions within Capsure Manager by the administrator.

This set up will give the user the necessary security permissions to access all required aspects of Capsure.

If the user is unable to access any specific section of Capsure, contact the administrator to check the security setup.

The user may have been set up as either a:
- Capsure User
- Windows User

A Capsure user must Login with their assigned user name and password (see section 1.2 Login).

1.1 Windows User

A Windows user will be automatically logged in as their MS Windows user and will not be asked to login, proceed to section 2. Opening a Project

1.2. Capsure User

Each user must login with their unique user name and password to access the Capsure application. (see fig. 1.2.1)

The administrator will have set up and supplied the user with this.

It is standard practise for the initial access by the user to prompt for a new password replacing the one assigned by the administrator.

Enter the selected password and then re-enter it for confirmation (see fig. 1.2.2)

All other access by the user will require the user name and password selected.

1.2.1 Changing your password

The user may change their password at any time. To do so, click the button (with the key icon) adjacent to the password text box (see fig.1.2.1).

This will display the <Setting your password> window (see fig. 1.2.2).

Figure 1.2.1 - Login screen

Figure 1.2.2 - Initial setting of password

Figure 2.0.1 - Select a Project

Figure 2.0.2 - Select a Project

2. Opening a Project

If more than one project exists or more than one project that the user may access, the project selection window will be displayed. (see fig. 2.1)

NB If the user should be able to see more that one project but cannot, contact the administrator to check security settings.

All available / allowed projects will be displayed as named icons.

Double click the icon to open the required project.

Prior to a user working on a project, the administrator/supervisor must have created Deliveries, Consignments and Batches.

If it is known that these have been created but none are displayed (see fig. 2.2) check that there are no filters set (see section 3. View Mode)

NB A filter may be set to only show deliveries created in the last week etc.
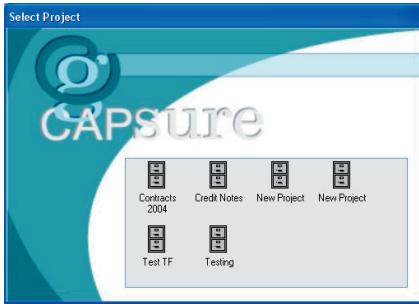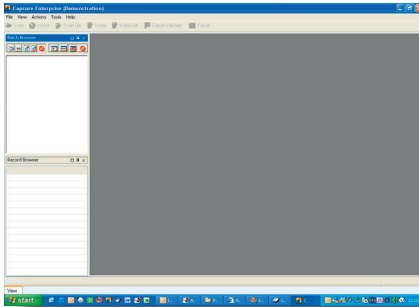
Figure 3.1 - View screen

Figure 3.1.1 - Menu bar - file

3. View Mode

The Capsure window (see fig. 3.1) is made up of a number of elements :

1. menu bar
2. tool bar
3. batch browser
4. record browser
5. image pane
6. information bar
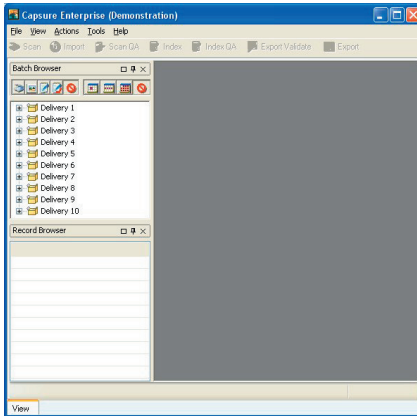7. title bar
8. index data

3.1 The menu bar

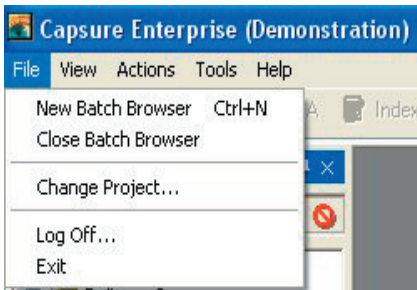The menu bar is divided into five drop down menus.

3.1.1 File

Use the <File> menu to

a). Open a new Batch Browser enabling multi tasking within the one application (see section...)

b). Close the current Batch Browser on completion of multi tasking, (see section ...)

c). Change Project, returning to the Select Project view (see section 2. Opening a Project) allowing the user to select a new project without closing the application.

d). Log Off; displays the Logging In screen to allow switching users without closing the application.

4

NB. Can be used if a user requires an action not allowed within their secutity permissions. Must always be returned to the user log-in on completion of that action.

d) Exit to close the current application.

3.1.2 View

To display the required information ,select/deselect the appropriate option (see fig. 3.1.2.1).

NB the standard default display will show the Batch and Record Browser, Image and Index pane. This default will become set to the individual users preferences.
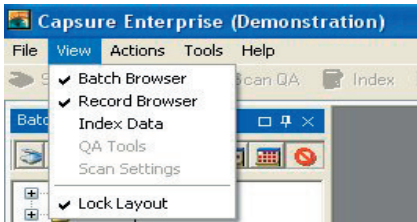

Figure 3.1.2.1 - Menu bar - View

a). Batch Browser, used to navigate through the deliveries, consignments and batches.

b). Record Browser, used to navigate through the individual pages/documents within a batch.

c). Index Data displays the individual index data assigned to the currently displayed image.

d). QA tools, these Quality Assessment tools are only available in Scan mode.

e). Scan Settings, these are only available in Scan or Import mode.

Figure 3.1.3.1 - Menu bar - Actions

Figure 3.1.4.1 - Menu bar - Tools

Figure 3.1.4.1.1 - Menu bar - Tools - Options Scanning

f). Lock Layout, when deselected will allow the operator to have the Record and Batch browsers floating or relocked to a different position on the window.
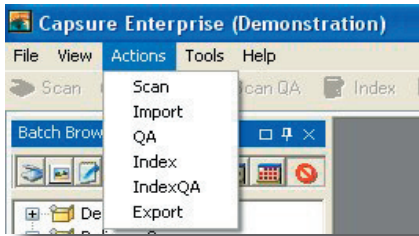
3.1.3 Actions

The Actions menu contains all the possible modes that the software can be used for, i.e. Scan, Import etc. This duplicates the button bar. (see fig. 3.1.3.1)

3.1.4 Tools

The tools menu options contains all other Capgen software that can be run, eliminating the need to use the Start Menu to initiate Capgen software. (see fig. 3.1.4.1)
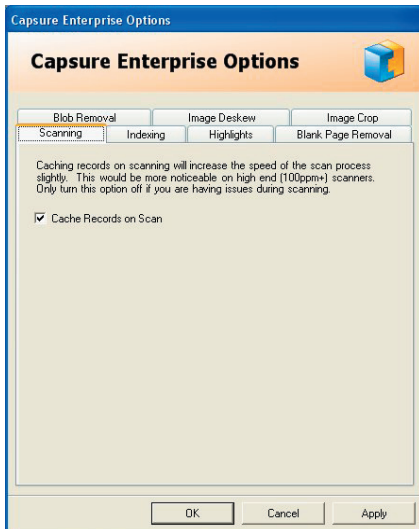
Each program will require a login unless set to be a Windows user. The accessible software is dictated by their security permission.

3.1.4.1 Tools - Options

This gives the operator the ability to set the program environment to their own specificaltion

3.4.1.1 Scanning

It is possible, when using high speed scanners; 100ppm or faster; and scanning across the network, the delay in the ability to save images may cause an issue.
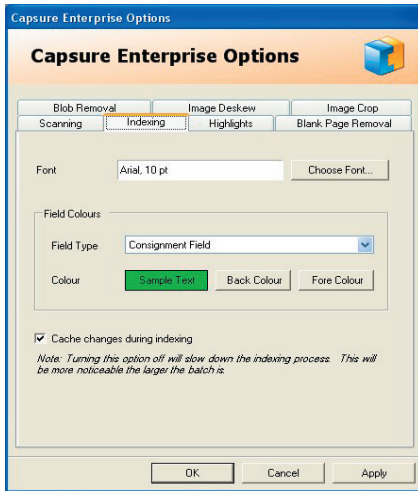
Figure 3.1.4.1.2a - Menu bar - Tools - Options Indexing
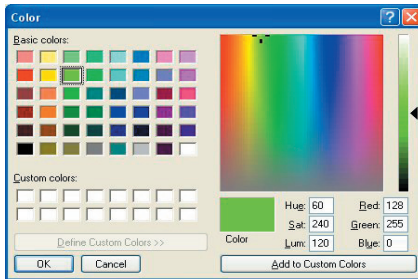

Figure 3.1.4.1.2b - Menu bar - Tools - Options Indexing - colour selection

Setting the <Cache Records on scanning> will prevent this by saving the images locally temporarily. (see fig. 3.1.4.1.1). The images will be copied to the image store when scanning is stopped or completed.

3.1.4.1.2 Indexing tab

The user has the ability to set the size and the style of font used when indexing and the highlight used to distinguish between indexing field levels.

In the example shown in fig. 3.1.4.1.2a, the font is set at Ariel 10pt with the Consignment level field as black on a green background.

Clicking the Back Colour button will display the colour selection screen (see fig. 3.1.4.1.2b) to enable the user to select their own personal choice. This selection will only apply to this user and will become the default whenever the user logs on at that workstation.

Clicking Fore Colour will allow the user to select the font colour using the colour selection screen (see fig.3.1.4.1.2b). The sample box on the Index tab will show the selections.

7

These changes can be applied individually to any or all of the following:

- Consignment Field
- Batch Field
- Document Field
- Page Field
- Invalid field
- Virtual Length field

NB Invalid field would be when data has been entered which does not match the setup.

Virtual length field would display the selected colours when the entry is longer than the setup specified length.

It would remain that colour until the text has been abbvreviated to match the correct setup length.

Record changes made during indexing can be cached to minimise the need to update all records as each record is indexed.

NB particularly critical when the number of records in any one batch exceeds 500..

3.1.4.1.3 Highlights tab

The same options as indexing are available for the specialised highlighted records which can be turned off if required (see fig. 3.1.4.1.3)
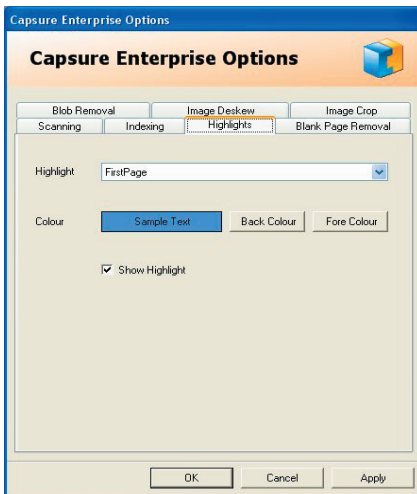

Figure 3.1.4.1.3 - Menu bar - Tools - Options Highlights

Figure 3.1.4.1.4 - Menu bar - Tools - Options
Blank Page Removal

Figure 3.1.4.1.5 - Menu bar - Tools - Options
Im,age Crop

These highlights can be applied to:

First Page (the first page of an indexed document)

First Page Bookmark (the first page of an imported document which may or may not be the first page of a document)

A Deleted record (marked for deletion in Scan QA or Indexing). A deleted record cannot be indexed and is therefore worth making obvious with highlighting.

3.1.4.1.4 Blank Page Removal tab

This allows the user to set the sensitivity of the blank page detection on scan.

The default settings are such that most blank pages will be detected and deleted on scan (see fig. 3.1.4.1.4).

NB it is generally safer to have some 'noisy' blank pages for deletion in Scan QA than to 'remove' pages that may have some pertinent data
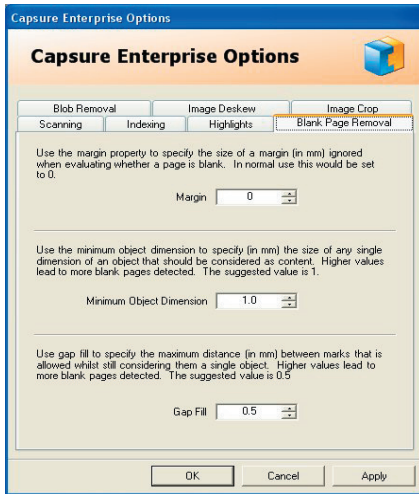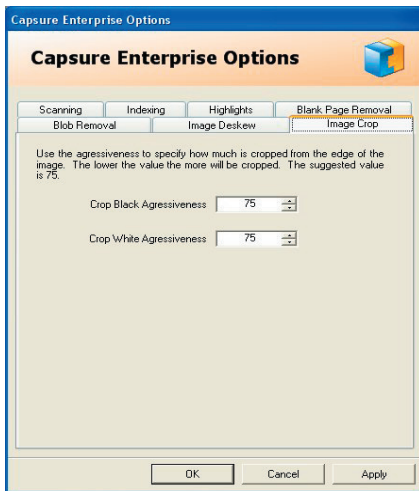
.

Figure 3.1.4.1.6 - Menu bar - Tools - Options Im,age Deskew
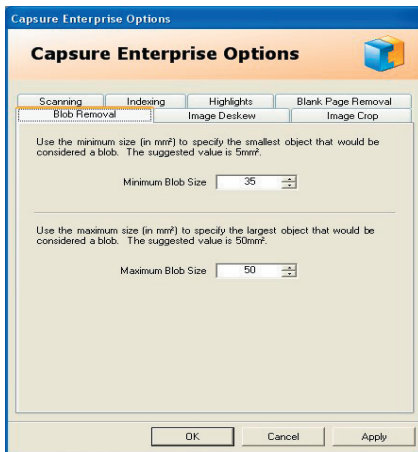
Figure 3.1.4.1.7 - Menu bar - Tools - Options Blob Removal

3.1.4.1.5 Image Crop tab

This allows the user to set the sensitivity of the automatic image cropping on scan.

The default settings are such that most borders should be cropped to give a clean edge to the images (see fig. 3.1.4.1.5)

3.1.4.1.6 Image Deskew tab

This allows the user to define how confident the software must be before deskewing (straightening up) an image (see fig. 3.1.4.1.6).

The higher values will take slighter longer to be performed and should therefore be adjusted to suit both the images and the setup.

3.1.4.1.7 Blob Removal tab

This allows the user to remove large marks (such as hole punch marks) from the image at the time of scanning (see fig. 3.1.4.1.7).

The software is looking for solid areas of Black and should be used with care. Incorrect setting will remove solid logos etc.

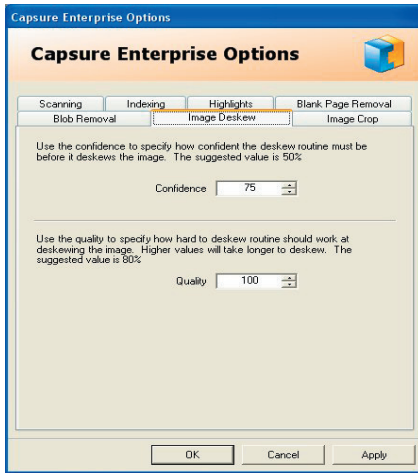*NB Test this set up carefully before scanning an entire section of data.*

10
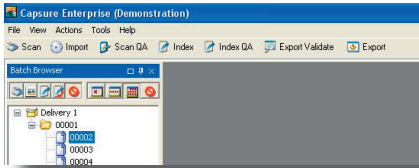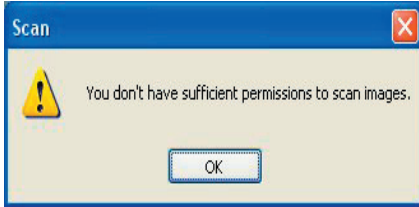
Figure 3.2.1 - Tool Bar
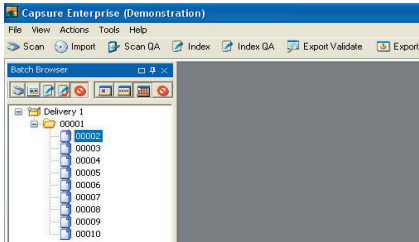

Figure 3.2.2 - No permission message

Figure 3.3.1 - Batch Browser
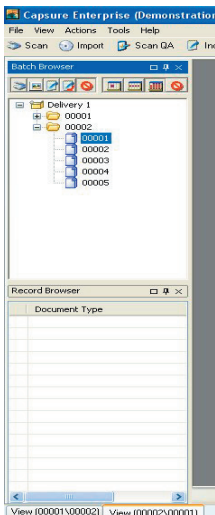

Figure 3.3.2 - Multiple Batch Browsers

3.1.5 Help

3.2 The Tool Bar

The tool bar is greyed out until a batch is selected and cannot therefore be accessed.

These options can only be applied to batches (see fig. 3.2.1)

Options available are:
1. Scan   (sect. 4)
2. Import   (sect. 5
3. Scan QA   (sect. 6)
4. Index   (sect. 7)
5. Index QA   (sect. 8)
6. Export Validate (sect. 9)
7. Export   (sect. 10)

If the user attempts an operation for which they do not have permission a message will be displayed (see fig. 3.2.2).

3.3 The Batch Browser

The Batch Browser allows the user to navigate between deliveries, consignments and batches by expanding or reducing the tree stucture (see fig.3.3.1).

It is possible to open more that one Batch Browser but only within the same Project.

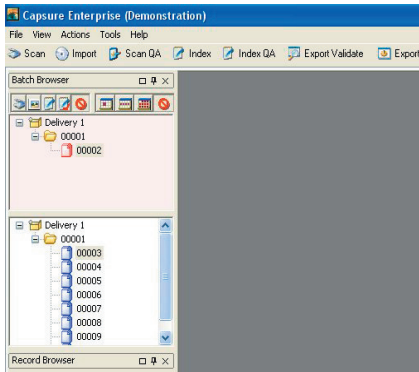These will be displayed as Tabs (see fig. 3.3.2). Each tab is labelled by mode and Consignment/ batch.

11

Figure 3.3.3 - Batch Browser with Fast Track

This is useful if the user is checking between batches of the same consignment or different Deleiveries and/or consignments.

No image is displayed until a consignment and a batch have been selected.

If Deliveries, Consignments or Batches have been designated by the Administrator or Supervisor as Fast Tracked they will appear in a separate Batch Browser above the standard one (see fig. 3.3.3).

Fast Tracking indicates that the listed Deliveries/Consignments and/or Batches are to be handled immediately, ahead of all other work.

3.4 The Record Browser

If there are no images in a batch, no records can be shown unless the project is set to use UPI (Unique Page Identifier) numbers.

This is used when original document pages have been stamped with a UPI prior to scanning see (fig. 3.4.1)

Once the pages have been stamped the Manager is notified and can create the records prior to scanning.
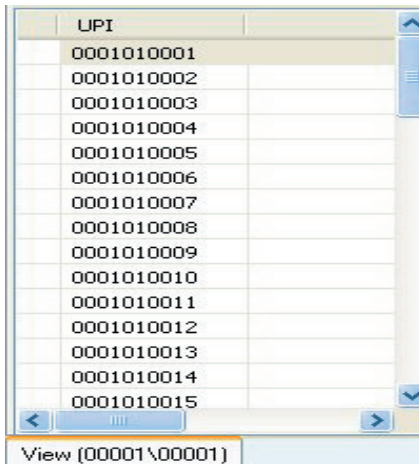
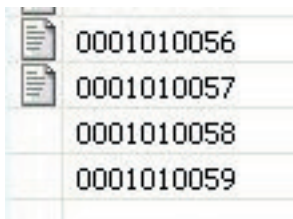Figure 3.4.1 - Record Browser for project using UPI numbers

Figure 3.4.2 - Record Browser for project using UPI numbers

The indexer is then able to index records prior to scanning (negating the need to remove document fastenings until required to do so for scanning).

The first column in the Record Browser is blank indicating that no images have yet been scanned.

On scanning this column will contain a document icon (see fig. 3.4.2)

Opening multiple Batch Browsers automatically opens associated Record Browsers.

The record browser can be used to view any image within a batch.

3.4.1 Document identification and navigation

There are several ways to navigate through a batch using the record browser dependant on the status of the batch.

3.4.1.1 No images

There will be no record when no images have yet been scanned or imported into the batch.

The only exception to this is when the projected has been designated as having UPI numbers and the image total has been entered.

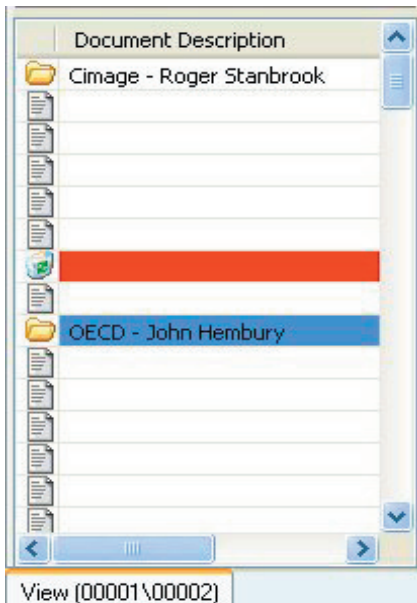In this case, records will exist prior to any images being captured.

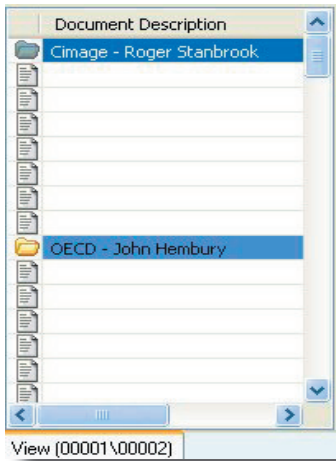Figure 3.4.1.3 - Record Browser showing a deleted image

13

Figure 3.4.1.4 - Record Browser showing indexed documents

3.4.1.2 Scanning complete

Where images have been previously scanned into a batch using the Up and Down arrow keys will navigate through the images one by one. Any specific image can also be selected.

The image will be displayed in the Image window (see section 3.5)

3.4.1.3 Scan QA completed

When Scan QA is completed and some images deleted, the icon and highlight will display this using a bin icon and the highlight set within Options, as shown in fig. 3.4.1.3)

3.4.1.4 Indexing completed

Prior to indexing; a batch is percieved, within the software, as containing individual images with no 'Documents'.

Each index entered against a record is perceived as page one of a new document.

Once indexing has been completed it is possible to navigate through the documents using the Page Up and Page Down keys which move to the following or previous document page 1 respectively.

A document page one is indicated with a Folder icon (see fig. 3.4.1.4)

Figure 3.5 - Image pane - best fit

Figure 3.5.1.1 - Image pane - Draw a box

Figure 3.5.1.2 - Image pane - enlarged

3.5 Image Pane

On selecting a batch, the first image within that batch will be displayed automatically within the image pane.

Selecting an image from the Record Browser will display the selected image.

Only one image can be displayed at any one time.

The image view will default to the display of the whole image (Best Fit) as shown in fig. 3.5
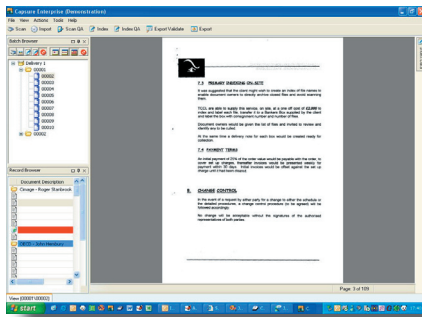
3.5.1 Zoom

To zoom into the image, use the left hand mouse button to draw a box around the area to be examined (see fig. 3.5.1.1).

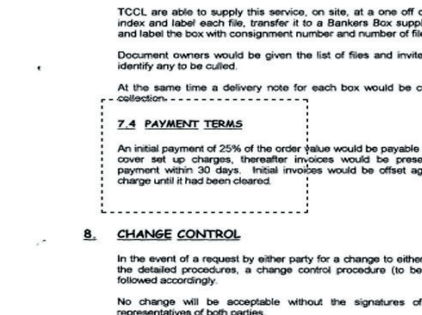As the mouse button is released the selected portion of the image will be redrawn as Best Fit in the image pane (see fig. 3.5.1.2).

Use the slider bars to manoeuvre around the image.

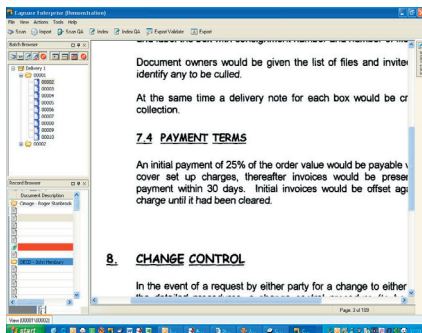Click the right mouse button to return to full page view.

3.6 Information Bar

The bar below the image pane is used to display a variety of information. Fig. 3.6.1 shows opening an empty batch for scan or import, therefore containing zero pages.
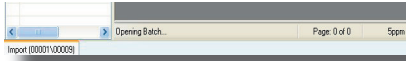
Figure 3.6.1 - Information bar

When documents are selected for importing (see fig.3.6.2) this bar will display the :-
- name of the importing file
- document page count
- total images in the batch
- import speed as pages/min.
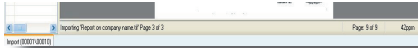
Figure 3.6.2 - Importing a file

During scanning the only information that can be displayed is the total images in the batch (incrementing as pages are scanned) and the scan speed as pages per minute.

In view,scan and index modes the only infomation to be displayed is the total images in the batch.

3.7 Title Bar

The title bar will display the active program (Capsure Enterprise) and the active project name.(see fig. 3.7.1)

Figure 3.7.1 - Title bar

16

Figure 3.8.1 - Index data tab
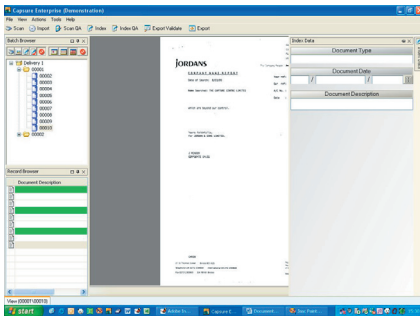
Figure 3.8.2 - Index data pane unanchored
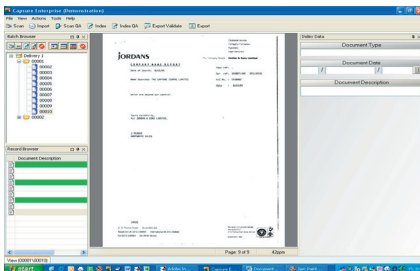
Figure 3.8.3 - Index data pane anchored

3.8 Index Data

The index data will default to an anchored (pinned) pane but can be floated by clicking the pin icon. It would then be displayed as a tab on the right hand side of the pane. (see fig. 3.8.1).
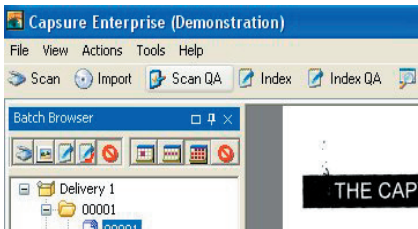
Hovering over the tab will expand the pane (see fig.3.8.2) but this will not resize the image. The image may therefore be partially covered.

Clicking on the Pin icon will anchor the index data again and the image will be resized to display as Best Fit. (see fig. 3.8.3).

If the index data pane is closed in error (using the X - top right of the pane) it can be redisplayed by using <View><Index Data> from the menu bar.

3.8.1 Problems with Index display and/or order

If the index information is not displayed or not all fields are displayed ask the administrator to check the Field layout within Capsure Manager.

If the index information is incorrectly displayed by sequence or field sizing, ask the administrator to check the Field layout within Capsure Manager
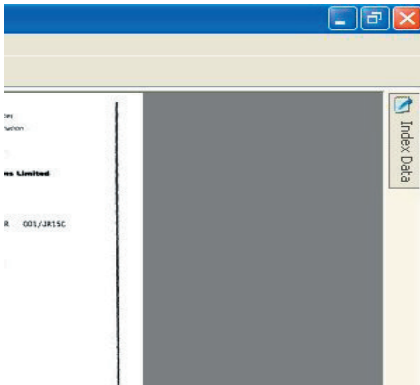
4. Scanning

Scanning is the means in which paper originals are captured electronically using Capsure software and a scanner.

A tested and approved list of scanners is included in the appendices of this manual.

The scanner may be a small desktop model or a large industrial scanner but must have either a TWAIN or ISIS driver. It may be connected to the PC designated for scanning via a SCSI, USB or Firewire connection.

NB If the scanner is connected via SCSI, ensure that the cable from the scanner to the PC is connected and the scanner switched on before booting up the PC.

To start scanning, select the required batch and click the Scan button on the tool bar (see fig. 4.0.1) or select <Action><Scan> from the menu bar.

The pane will change to scan mode view (see fig.4.0.2) and is composed of the following elements:

1. Image pane
2. Record browser tab
3. Information bar
4. Scan setting
5. Scan tasks
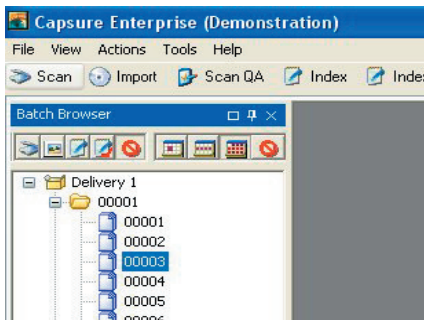
Figure 4.0.1 - Select Scanning
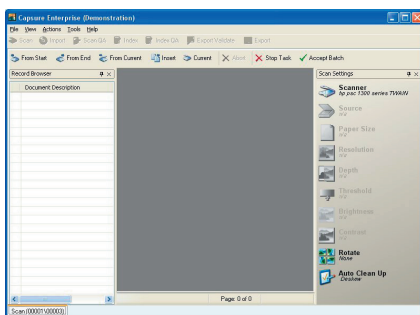
Figure 4.0.2 - Select Scanning

4.1 Image Pane

Before any images are scanned or imported into a batch the image pane is blank.

If images have been previously scanned or imported into the batch, the first image of that batch will be displayed

4.2 Record Browser tab

On selecting a task, the tab label at the bottom of the Record Browser (see fig. 4.2.1) will display the following:

- mode (Scan, QA etc)
- Consignment number
- Batch Number

The Batch browser is no longer displayed as the working batch is now fixed.
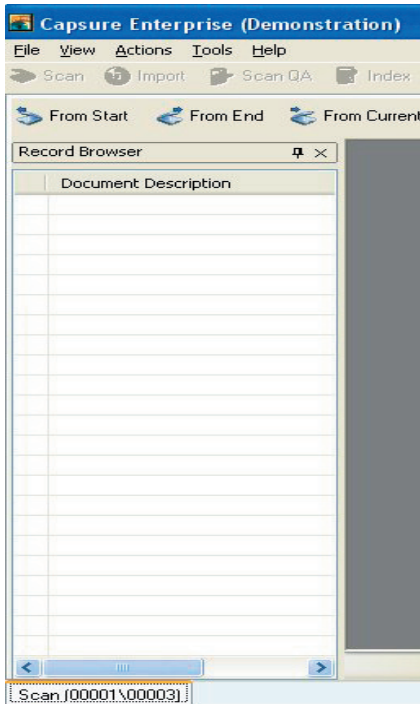
Figure 4.2.1 Record Browser tab
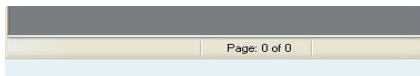
4.3 Information bar

Figure 4.3.1 Information bar

The information bar appears at the bottom of the image pane and is used to display the 'image of image total' information (see fig. 4.3.1) and during scanning will display the pages per minute (ppm) scanned.
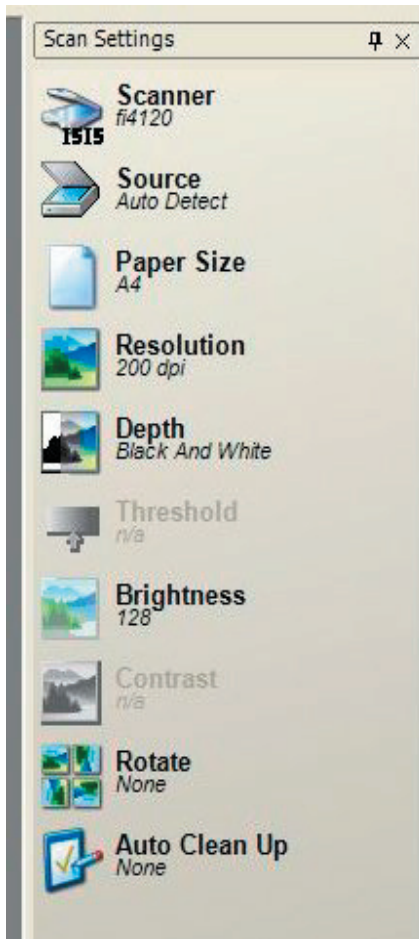
4.4 Scan setting

Figure 4.4.1 Information bar

When using the TWAIN interface, most of the options will be greyed out as the scanner is controlled via the TWAIN interface panel.

When using the ISIS driver, all controls can be accessed via the scan settings pane (see fig. 4.4.1).

Access to these controls will be constrained by the capabilities of the selected/attached scanner

4.4.1 Scanner

Click the Scanner icon to select which interface to use and whether to access the controls via Capsure.

When using the ISIS driver it is possible to use either the specific driver interface window or the Capsure scan tools.

If the Capsure option is not selected all scanner controls will be greyed out.

4.4.2 Source

Source refers to the feed mechanism of the scanner. Available options are:
- Flat Bed
- ADF (Automatic Document Feeder)
- Simplex (scans front side only)
- Duplex (scans both front and rear)
- Auto (Importing only)

Click the required option to select.

20

4.4.3 Paper Size

The range of paper sizes that can be scanned is constrained by the selected scanner but may include:
- A5 up to A0
- Legal
- Letter
- Custom

Each of these sizes may be combined with Landscape or Oversize.

As most scanners have oversize page detection systems, setting Oversize scanning enables the basic paper size to be set with an additional 5,10,15 or 20% page size.

This will minimise preparation as divider pages with tabs do not need to be removed.

4.4.4 Resolution

The resolution range is constrained by the selected scanner but can range from 75dpi (dots per inch) through to 9600dpi.

NB The most commonly used resolutions are 200dpi and 300dpi for mono scanning and 100dpi or 150dpi for colour.

Auto Resolution is greyed out as this is only available via Importing.
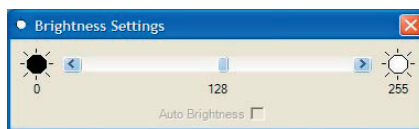
Figure 4.4.7 Slider control

4.4.5 Depth

Depth refers to the colour of image to be captured. Select from the displayed options:
- Black & White
- Grey Scale
- Colour 8-bit
- Colour Full

Auto detect can only be selected within Importing.

NB A colour or Grey scale image cannot be captured on a scanner only capable of Black & White.

4.4.6 Threshold

Threshold is set by the use of a slider bar from a range (0-255 see fig. 4.4.7).

Auto can be selected if available with the selected scanner.

4.4.7 Brightness

Brightness is set by the use of a slider bar from a range (0-255 see fig. 4.4.7).

Auto can be selected if available with the selected scanner.

4.4.8 Contrast

Contrast is set by the use of a slider bar from a range (0-255 see fig. 4.4.7).

Auto can be selected if available with the selected scanner.

4.4.9 Rotate

Rotation is a post scan operation used to minimise time spent in QA (Quality Assurance).

The speed of scanning is maximised by feeding paper in landscape mode. Rotating an image at scan time will then represent all images in portrait mode.

The rotation for Simplex images can be set to:
- Rotate Left 90 deg.
- Rotate Right 90 deg.
- Rotate 180 deg.

Rotation for Duplex images must be set to one of the following:
- Rotate Left/Right
- Rotate Right/Left

Where the second direction refers to the requirement for the reverse side image.

NB test scan a few pages to ensure the correct setting has been selected

4.4.10 Clean up

Clean Up is a post scan operation used to minimise time spent in QA (Quality Assurance).

4.4.10.1 Crop Black Border

Crop Black Border will remove extraneous parts of the captured image into the first detected white line.

No.	Description	V3
1	Crop Black Border	No
2	Crop White Border	No
3	Crop Border	Yes
4	Deskew	Yes
5	Blank Page Removal	Yes
6	Blob Removal	Yes
7	Line Removal	No
8	Dilate	Yes
9	Despeckle	No

Table 4.4.10 - Availability of clean up options for Capsure version 3x

4.4.10.2 Crop White Border

Crop White Border will remove extraneous parts of the captured image into the first detected Black line.

4.4.10.3 Crop Border

Crop Border will remove extraneous parts of the captured image into the first detected line, usually the edge of the original image.

The aggressiveness of this crop can be adjust via <Tools><Options><Image Crop> (see section 3.1.4.1.5).

The more aggressive this is set the more likely the image will be overcropped.

4.4.10.4 Deskew

Deskew will automatically straighten images usually to the edge of the image.

The aggressiveness of this deskew can be adjust via <Tools><Options><Image Crop> (see section 3.1.4.1.6).

4.4.10.5 Blank Page Removal

Blank Page Removal will automatically delete (will not retain the image for) any page containing less information than the minimum set within <Tools><Options><Blank Page Removal> (see section 3.1.4.1.4)

4.4.10.6 Blob Removal

Blob Removal will eliminate black marks caused by holes punched in the original paper.

The aggressiveness of this removal can be adjust via <Tools><Options><Image Crop> (see section 3.1.4.1.7) and should be tested on typical images before proceeding with mass capture.

4.4.10.7 Line Removal

Line Removal will enable lines created during scanning to be removed.

The judgement is made on lines that appear to be continuous from top to bottom of the scan with no break.

NB cleaning the scanner lenses should remove the capture of the line in the first place unless caused by a scatch in the scanner glass.

4.4.10.8 Dilate

Dilate is designed to infill text created with a dot matrix printer. If used on images created with any other printer, the text may appear blurred.

4.4.10.9 Despeckle

Despeckle will automatically remove isolated black pixels perceived as 'Noise' (dirty background to original pages).

Figure 4.5.0.1 - Scanning with UPI

Figure 4.5.0.2 - Scan task bar

Item	Types	Tasks
1	Start	From Start
2		From End
3		From Current
4	Correct	Insert
5		Current
6	Stop	Abort
7		Stop Task
8		Accept batch

Table 4.5.0.3 - Scan types and tasks

4.5 Scan Tasks

Ensure that all the correct options are selected from the Scan settings.

If the project was set up to have Unique Page Identifiers (UPI) all records will have been previously created and will be displayed in the Record Browser (see fig. 4.5.0.1)
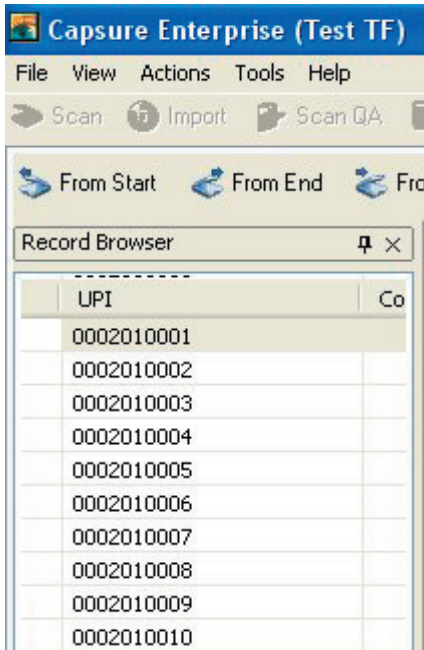
Scan tasks (see fig. 4.5.0.2) can be divided into three types expanded in table 4.5.0.3:
• Start scanning
• Correct scanning sequence
• Stop Scanning

Start Scanning - Where within a batch should scanning start from.

UPI projects would generally use 'From Current' ensuring that the UPI stamped on the original matched the UPI selected from the Record Browser
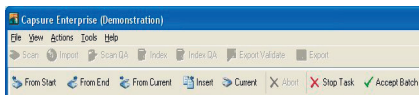
Correct Scanning sequence - replace the image or insert images before the image selected in the Record Browser.

Stop Scanning - Abort the process or close the scanning task mode.

4.5.1 From Start

This positions the record pointer at number 1 and is generally used when all images within a batch are to be replaced by the new scans.

It can also be used to scan into an empty batch (From End would have the same result).

For UPI projects ensure that the UPI on the original to be scanned matches the first record listed in the Record Browser.

4.5.2 From End

Scanning will start after the last image in the current batch. If there are no images in the batch, image one will be created.

For UPI projects, if there are more stamped images than records created, ensure that the next original to be scanned is the next sequential UPI (see Capsure Manager manual section 6.2.1 for further details)

4.5.3 From Current

Scanning will start from the selected record, replacing the selected image and all following images.

For UPI projects, ensure that the UPI on the original to be scanned matches the selected record UPI.

4.5.4 Insert

Records and images will be inserted before the selected image.

The number of inserts that can be made in a UPI project is 9.

In an ordinary project there is no limit to how many images can be inserted.

NB it would be better practice, if a large number of images are found to have been missed, to rescan the batch 'From Current'

4.5.5 Current

Current allows a single image to be rescanned.

NB If the scan setting is Duplex then, two images would be rescanned, the selected image and the following one.

4.5.6 Abort

Abort only applies to Importing and is therefore greyed out within the Scan task buttons.

4.5.7 Stop Task

When scanning is to be discontinued (i.e. end of operator shift), Stop Task will close the Scan mode but not mark the batch as completed.

NB It is important to close the Scan mode via the correct method as this is used within the reporting and exporting modes.

4.5.8 Accept Batch

When scanning for the current batch is completed, Accept Batch will close the Scan mode and mark the batch as completed. (see note in section 4.5.7).

Figure 4.5.0.2 - Importing

Figure 5.0.2 - Import mode view

5. Importing

Importing is the means in which electronic originals are captured using Capsure software.

The following range of electronic files can be captured:
- Image Importer (JPEG, TIFF, PNG, GIF, BMP
- PDF Importer
- Microsoft Word Importer
- Microsoft Excel Importer
- Microsoft PowerPoint Importer

To start Importing, select the required batch and click the Import button on the tool bar (see fig. 5.0.1) or select <Action><Import> from the menu bar.

The pane will change to Import mode view (see fig.5.0.2) and is composed of the following elements:

1. Image pane
2. Record browser tab
3. Information bar
4. Scan settings
5. Import tasks

5.1 Image Pane

Before any images are imported or scanned into a batch the image pane is blank.

If images have been previously imported or scanned into the batch, the first image of that batch will be displayed
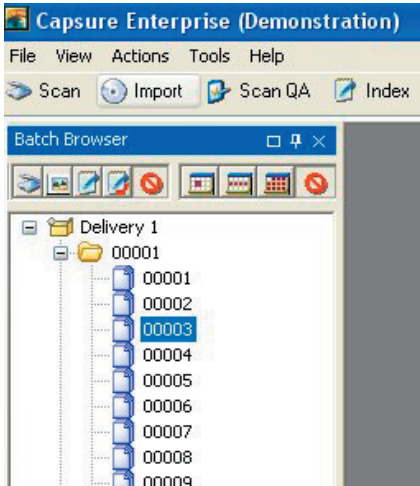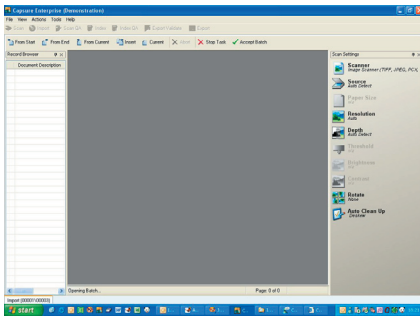
Figure 5.2.1 - Record Browser

5.2 Record Browser tab

On selecting a task, the tab label at the bottom of the Record Browser (see fig. 5.2.1) will display the following:
- mode (Import, QA etc)
- Consignment number
- Batch Number

The Batch browser is no longer displayed as the working batch is now fixed.

5.3 Information bar

The information bar (see fig. 5.3.1) appears at the bottom of the image pane and is used to display the
- image of image total information
- file being imported
- total pages within that file
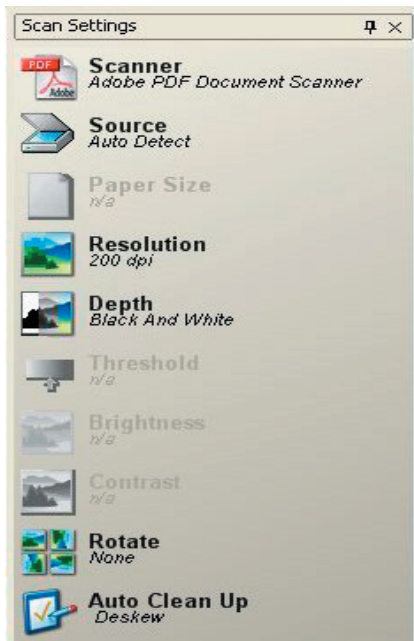- pages per minute (ppm) imported.

Importing 'Capsure Enterprise.pdf' Page 7 of 8   Page: 6 of 15   33ppm

Figure 5.3.1 - Information bar

5.4 Scan Settings

Figure 5.4.1 - Scan settings for Importing

When using the Import, many of the options in the scan settings will be greyed out as they do not apply to importing (see fig. 5.4.1).

5.4.1 Scanner

In the context of Importing, images are electronically scanned. Click the Scanner icon to select which importer to use. The options are:
- Image Importer (JPEG, TIFF, PNG, GIF, BMP
- PDF Importer
- Microsoft Word Importer
- Microsoft Excel Importer
- Microsoft PowerPoint Importer

NB if a Microsoft file has another file imbedded (i.e. an excel table within MS Word) it may not import correctly and should be checked against the original.

5.4.2 Source

In the context of Importing, Source can only be Auto Detect.

This will be selected by default.

5.4.3 Paper Size

Paper size will be greyed out as it is not applicable to Importing.

5.4.4 Resolution

The resolution range has no constraints and can be set to any of the range from 75dpi (dots per inch) through to 9600dpi.

This setting will import the image at this resolution.

Auto detect is only available for image formats as no other format has an inherent resolution.

NB The most commonly used resolutions are 200dpi and 300dpi

5.4.5 Depth

Depth refers to the colour of image to be captured. Select from the displayed options:
   • Black & White
   • Grey Scale
   • Colour 8-bit (n/a to importing)
   • Colour Full
   • Auto detect

NB If Black & White is selected all colour or Grey scale image will be imported as Black & White.

Auto detect will import black & white as black and white, colour as colour.

5.4.6 Threshold

Not applicable to Importing

5.4.7 Brightness

Not applicable to Importing

5.4.8 Contrast

Not applicable to Importing

5.4.9 Rotate

Rotation is a post scan operation used to minimise time spent in QA (Quality Assurance).

The rotation can be set to:
   • Rotate Left 90 deg.
   • Rotate Right 90 deg.
   • Rotate 180 deg.
   • Rotate Left/Right
   • Rotate Right/Left

NB test import a few pages to ensure the correct setting has been selected

5.4.10 Clean up

Clean Up is a post scan operation used to minimise time spent in QA (Quality Assurance).

All Clean up setting are identical to scanning. For a full description see section 4.4.10.

5.5 Scan Tasks

Ensure that all the correct options are selected from the Scan settings.

Import tasks are identical to Scan tasks (see section 4.5).

Figure 6.0.1 Select Scan QA

Figure 6.0.2 - Scan QA mode view

6. Scan QA

Scan QA is the point at which images are checked against originals for quality of capture and assurance that no images have been missed.

With high speed industrial scanners it is no longer practical or good practice to check image during the scanning process.

Select the batch to be QA'd and click the Scan QA button on the tool bar (see fig. 6.0.1).

The pane will change to QA mode view (see fig.6.0.2) and is composed of the following elements:

1. Image pane
2. Record browser tab
3. Information bar
4. QA tools
5. QA Tasks

6.1 Image Pane

Before any QA has been done on a batch the image pane will display the first record of the batch.

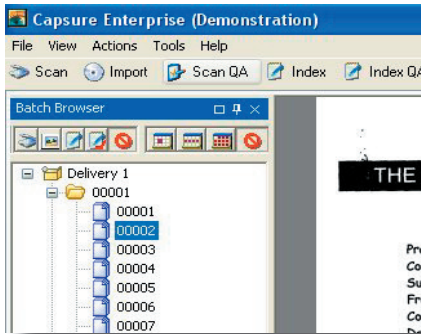If a batch has been partially QA'd the first non-QAd image of that batch will be displayed.
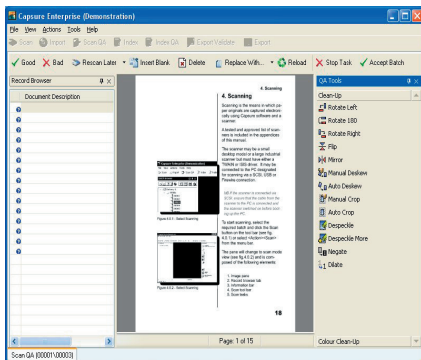
Figure 6.0.2 - Scan QA mode view

Figure 6.3.1 - Info bar

6.2 Record Browser tab
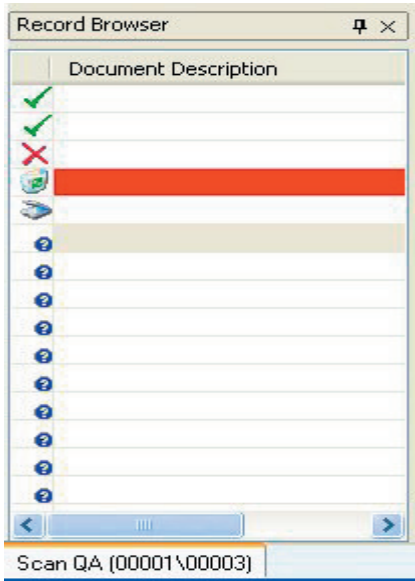
On selecting a task, the tab label at the bottom of the Record Browser (see fig. 6.2.1) will display the following:
- mode (Import, QA etc)
- Consignment number
- Batch Number

The Batch browser is no longer displayed as the working batch is now fixed.

The first column in the Record browser shows the status of the image:
- QA flag good image (green tick)
- QA flag bad image (red cross)
- Deleted image (bin)
- Rescan later (scanner)
- Query - non QAd image (question)

The indication of a deleted image can be configured using <Tools>< Options><Highlights>.
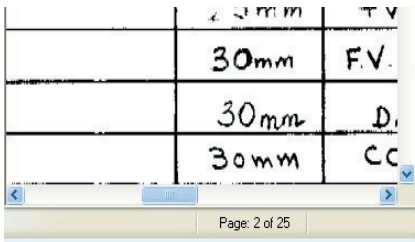
6.3 Information bar

The information bar (see fig. 6.3.1) appears at the bottom of the image pane and is used to display the position within the batch as image of image total.
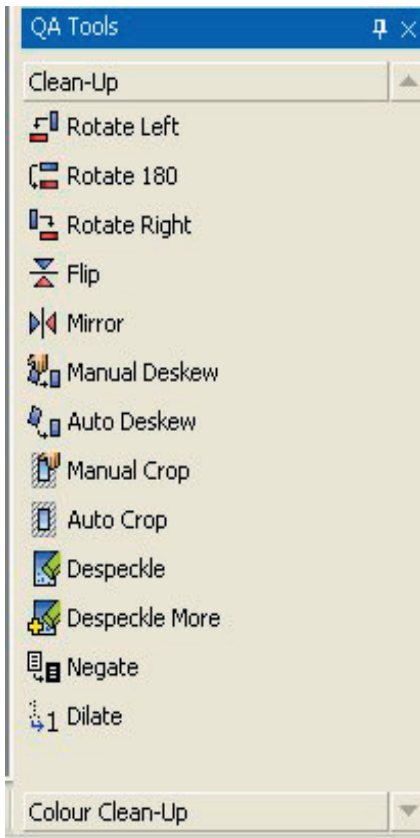
6.4 QA Tools

QA tools are used to improve the image presented to the end user by correcting the rotation, removing unwanted information around the image and ensuring that it is an accurate representation of the original image (see fig. 6.4).

If any action is taken to the detriment of the image, the user can 'Reload' the original scan.

NB Reload will only work before the user moves onto another image.

6.4.1 Rotation

The rotation of the image can be changed to provide the correct orientation for viewing.

The top of the page should appear at the top of the image. Use Rotate Left, Right or 180 to correct the images.

6.4.2 Invert

Using Flip or Mirror, the image can be inverted around a horizontal or vertical access.

NB This can be required where drawings have been created on the reverse of translucent paper.

6.4.3 Deskew

Scanned images are commonly deskewed automatically at the point of capture.

Figure 6.4 QA Tools

32

Figure 6.4.3 - Manual deskew

Figure 6.4.4 - Manual Crop

Where the auto-deskew was unable to accurately create a squared image, the image should be corrected with manual deskew.

Select Manual deskew from the QA tool bar, hold down the left mouse key and draw a line that should be parallel to the top of the image (see fig. 6.4.3).

On release of the mouse key, the image will rotate by the required amount, producing a squared up image.

NB This may produce an overlarge image as the width of the skewed image would have been larger than the squared original. Use manual crop to correct this. (see section 6.4.4)

In some cases where the original was incorrectly produced (i.e. copied or faxed crookedly) manually cropping the image (see section 6.4.4) and Auto deskew will correct the problem.

6.4.4 Crop

Where an excessive border has been captured (i.e. was skewed on capture and then deskewed within QA, see section 6.4.3) manual crop can be used to remove it.

Select manual crop from the QA tools and, holding down the left mouse key, draw a box around the section of the image to be retained (see fig. 6.4.4).
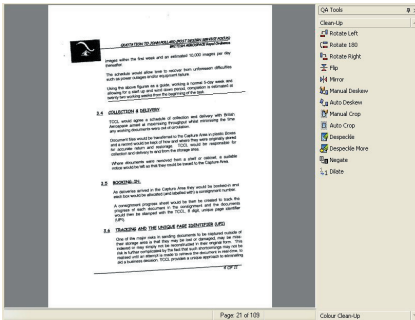
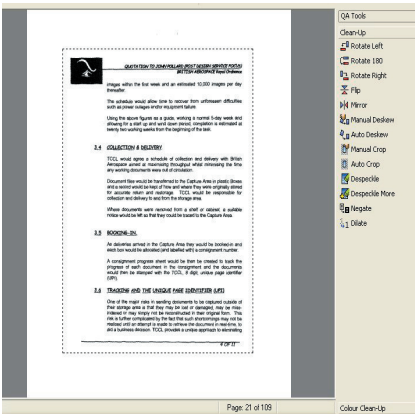On release of the mouse key the image will be redrawn without the excess.

Auto crop should only be necessary when the Scanner auto crop is not activated.

6.4.5 Despeckle

Despeckle removes isolated pixel that appear as noise within the image.

This should be used with care as decimal points may appear to be isolated pixels and would be removed, changing the content of the image.

6.4.6 Dilate

Dilate is used when the original image was printed on a Dot Matrix printer and therefore does not necessarily appear a good, sharp scanned image.

The process attempts to 'join up' the dots within figures to clarify the view.

6.4.7 Colour Clean up

Colour clean up enables the user to sharpen an image (increase the contrast between light and dark) without the necessity to rescan the original.

Figure 6.4.7.1 shows an original scanned colour image and figure 6.4.7.2 shows the same image 'Sharpened'.
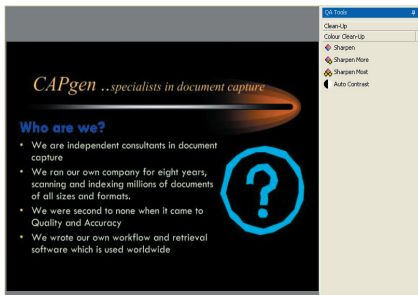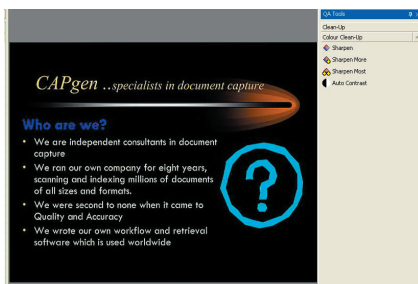

Figure 6.4.7.1 - Scanned colour image

Figure 6.4.7.2 - Sharpened colour image

34

6.5 QA tasks

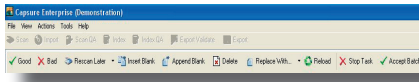Figure 6.5.1 - QA Tasks

QA tasks appear as a series of buttons (see fig. 6.5.1).

6.5.1 Assessment

Images are assessed by comparing them to the original document on a page by page basis.

As each image is viewed it can be classified as:

6.5.1.1 Good

The scanned image is an accurate copy of a medium to good original and a 'tick' icon will appear next to the record

6.5.1.2 Bad

The scanned image is an accurate copy of a bad original. It cannot be improved by further scanning and enhancing. A 'cross' icon will appear next to the record.

6.5.1.3 Rescan Now/Later

This button can be toggled between 'Rescan Now' and 'Rescan Later'.

If the Q.A. station has a scanner attached, check the button reads 'Rescan Now' and click to display the Twain scanner interface allowing the image on the screen to be rescanned.

If the Q.A. station does not have a scanner attached, check the button reads 'Rescan Later' and click. This will flag the image as requiring rescanning and display a 'scanner' icon against the record.

6.5.2 Adjust Document

If, when comparing the original to the scanned images, the document is found to be incorrect, i.e. a page missing or incomplete, blank records can be either inserted or appended. Excess images can be deleted or replaced with a previously scanned image.

6.5.2.1 Insert Blank

Insert Blank places a blank record before the image being displayed in the image window.

Once inserted, use Rescan Now/ Later to replace the blank image with the necessary page (see section 6.5.1.3).

6.5.2.2 Append Blank

Append Blank will place a blank record after the last image in the batch.

Once Appended, use Rescan Now/Later to replace the blank image with the necessary page (see section 6.5.1.3).

Figure 6.5.2.3 - Replace with

Abbrev.	Description
ADF	Another Doc. follows
DNA	Doc. not available
RTI	Refer to index
SNA	Section not available

Table 6.5.2.3 - Standard image descriptions
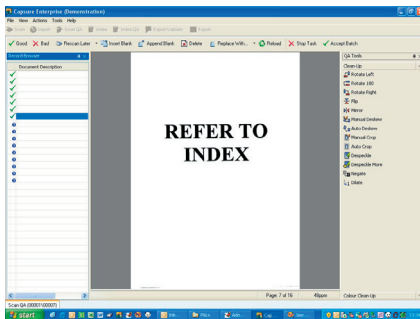
Fig 6.5.2.3.1 - Standard image descriptions

6.5.2.3 Delete

Where an image is not required (i.e. a folder divider) click the Delete button to mark the image 'To be Deleted'.

Images are not deleted until the batch is exported and can be 'un-deleted' if necessary by assessing the image as Good or Bad.

6.5.2.3 Replace with

It may be necessary to replace an image with a previously scanned one, e.g. a large format image or a colour image or Insert Blank and replace this with a standard image.

Click the 'Replace with' button to display the browse window. Locate the correct image and click Open to replace the displayed image.

To replace the image with a standard image (in the case of a folder section containing no documents) select one of the listed documents (see fig. 6.5.2.3). The standard image will be displayed (fig. 6.5.2.3.1)

The description for these standard images is shown in table 6.5.2.3.

This list of images can be added to by saving any image file in the Images folder under the Capgen 3 folder (containing the application) i.e. ...\Capgen3\Images.

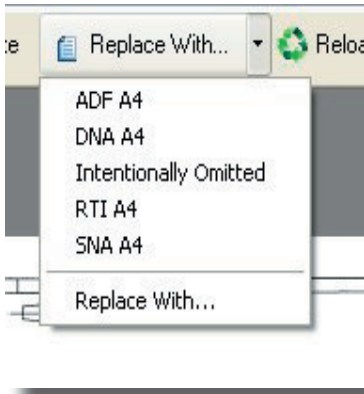Next time that a batch is opened in QA mode, the new images will be listed.

6.5.3 Reload

If at any time during the QA process an image is incorrectly cropped or replaced, using the Reload button will bring up the original scanned image.

This will only happen whilst the image is being viewed and worked on. Changing the record viewed will automatically save the image as is.

If this happens Rescan the image.

6.5.4 Close QA mode

6.5.4.1 Stop Task

When QA is to be discontinued (i.e. end of operator shift), Stop Task will close the QA mode but not mark the batch as completed.

NB It is important to close the QA mode via the correct method as this is used within the reporting and exporting modes.

6.5.4.2 Accept Batch

When QA for the current batch is completed, Accept Batch will close the QA mode and mark the batch as completed. (see note in section 6.5.4.1).

Fig 7.0.1 - Select Index

Fig 7.0.2 - Index pane

7. Index

Indexing is the means by which individual documents are identified by unique data.

Select the batch to be Indexed and click the Index button on the tool bar (see fig. 7.0.1).

The pane will change to Index mode view (see fig.7.0.2) and is composed of the following elements:

1. Image pane
2. Record browser tab
3. Information bar
4. Index panel
5. Index tasks

7.1 Image Pane

On selecting Index the image pane will display the first image in the batch.

Use the down arrow keys to move through the images one by one or select a specific image with the mouse key.

If indexing has been previously entered, using the Page Up/Down key will move to the first image of the next/previous document.
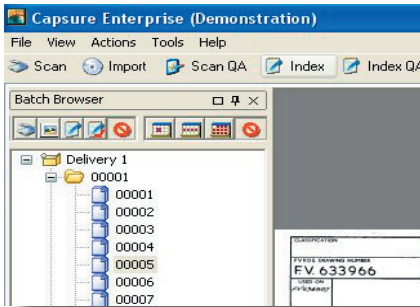
7.2 Record browser tab
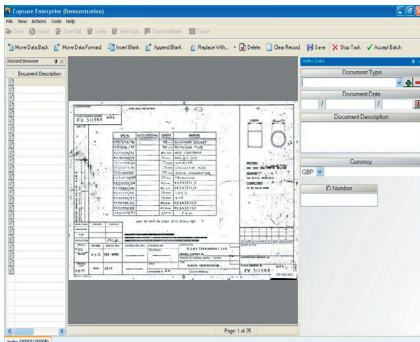
On selecting a task, the tab label at the bottom of the Record Browser (see fig. 7.2.1) will display the following:
- Mode (Import, QA, Index etc)
- Consignment number
- Batch Number

The Batch Browser is no longer displayed as the working batch is now fixed.

The first column in the Record Browser shows the definition of the image:
- Individual page (page icon)
- Document (folder icon)
- Deleted record (bin icon)

The indication of a deleted image can be configured using <Tools>< Options><Highlights>.

7.3 Information bar

The information bar (see fig. 7.3.1) appears at the bottom of the image pane and is used to display the position within the batch as an image of image total.
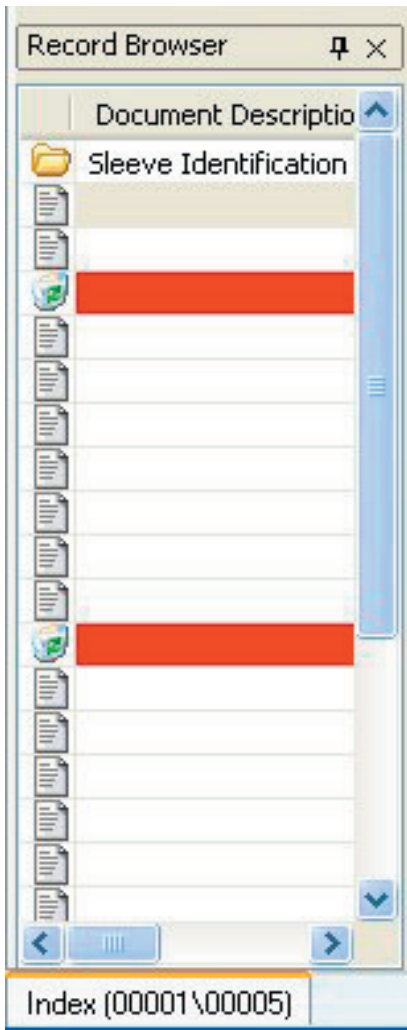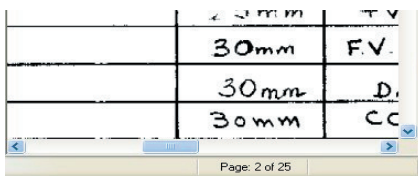
Fig 7.2.1 - Record Browser

Fig 7.3.1 - Record Browser - information bar

40

Fig 7.4.1 - Index panel

7.4 Index Panel

The rules to be applied to each field are setup by the project administrator within Capsure Manager, as are the fields themselves.

The sample shown in fig. 7.4.1 show the common field types.

Sect	Field Name	Field Type
7.4.3	Document Type	List
7.4.4	Document Date	Date
7.4.5	Document Description	Text
7.4.6	Currency	Multiple Currency
7.4.7	ID Number	Numeric

7.4.1 Field Level

If a field has been set up within Capsure Manager to be a Consignment or Batch level field it will be displayed with the appropriate highlight and will only need to be entered once per Consignment/ Batch respectively.

See section 3.1.4.1.2 for setting these highlights.

7.4.2 Quick Keys

During Field setup (an administration task in Capsure Manager) each of the function keys F1-F8 can be assigned unique values against individual fields.
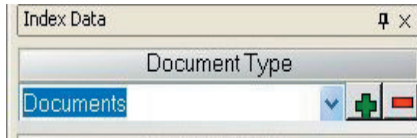
When entering data into a text field, clicking the appropriate function key will insert the assigned data at the cursor position. This can be anywhere within the field and need not be the whole entry.

In this way standard phrases or names may be added in a uniform way, ensuring accuracy of entry.

7.4.3 List Field

Fig 7.4.3 - Index panel - list field

All possible entries for this type of field are pre-entered within Cap-sure Manager.

The plus/minus signs, which will only be present if the user is assigned the correct permission, indicate that additional entries for the list may be added/removed at the time of indexing.

NB any such addition or subtractions will only be effective on other Index stations when any operator working on the same projects closes and re-opens the project.

Entries from the list box may be selected by
• clicking on the required entry shown in the drop-down list
• typing the initial letter of the required entry or by using the side arrows on the keyboard to scroll up or down through the list.

Where operator permissions are assigned to enter additional items, click the plus sign to display the dialogue box (see fig. 7.4.3.1).
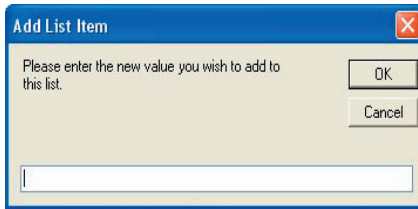
Add List Item

Please enter the new value you wish to add to this list.

OK

Cancel

Fig 7.4.3.1 - Add List item

Remove List Item

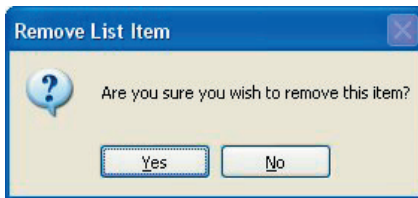? Are you sure you wish to remove this item?

Yes   No

Fig 7.4.3.2 - Remove List item

Where permissions are not assigned, refer to the project administrator.

Enter the new item and click OK. Re-enter the new item in the confirmation dialogue box and then select the new item from the drop-down list box to add to the index.

To remove an item no longer required, select the item from the drop-down list box and click the minus sign to display the confirmation dialogue box (see fig.7.4.3.2).

NB After adding or removing an item, remember to select the correct entry.

7.4.4 Date field

A date can be entered using the number keys and the / key to move between each part of the date.

For example; to enter 20th December 2005 the operator would type 20/12/05.

The date will be displayed as 20 December 2005 to ensure that no confusion occurs, such as with American or European date formats.

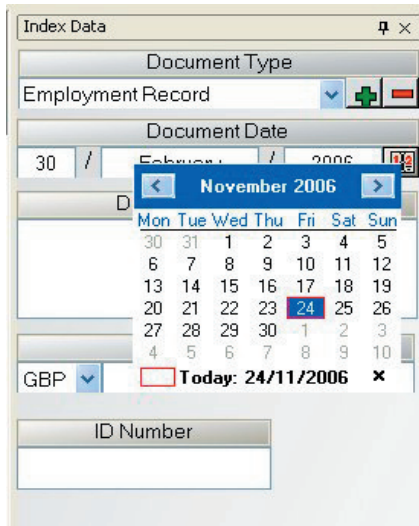The date can also be selected by clicking the calendar icon.

43

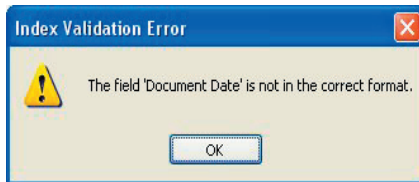Fig 7.4.4.1 - Using the calendar for date entry

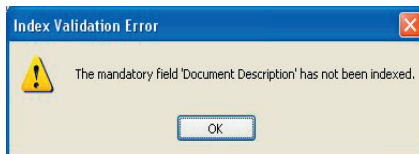Fig 7.4.4.2 - Invalid date error

Fig 7.4.5.1 - Mandatory entry error

This calendar can be scrolled to the correct month with the left/right arrows at the top of the pop up (see fig. 7.4.4.1) and the day selected by click the number required.

Moving off the index record invokes the validation checks. If the date entered is invalid the message shown in fig. 7.4.4.2 will be displayed. Ok will allow the operator to correct the error.

7.4.5 Text field

Many rules can be applied to a text field to ensure consistency and accuracy of data entered.

All the rules are set within Capsure Manager at the time of the projects creation by the project administrator.

7.4.5.1 Mandatory

If a field has been classified as mandatory, it cannot be left empty. If the operator moves off the record without entereing any data into the field the error message shown in fig. 7.4.5.1 is displayed.

Clicking OK allows the operator to return to the field and enter the required data.

44

7.4.5.2 Default value

If a default value has been entered at the time of field set up then leaving the field blank will cause the default value to be entered when leaving the field.

If a field has been set as Mandatory and has been given a default value, the mandatory function will not be invoked.

7.4.5.3 Spell checking

Where a field has been set for spell checking any incorrect entry will be validated as the document index is completed and a spelling query window displayed (see fig. 7.4.5.3a).

Fig 7.4.5.3a - Spelling query

Fig 7.4.5.3b - Selecting suggested spelling

The query screen can be set within Capsure Manager to either suggest correctly spelt words or not.

If Suggestions have been set, double click the correctly spelt word (if shown) and then Change (see fig. 7.4.5.3b) to replace the error.

If the suggestions do not show the word required the operator can select Ignore Once or Ignore All.

7.4.5.3.1 Ignore Once

Ignore Once will add the word to a Pending list within Manager for the Project Administrator to confirm but will query the spelling each and every time it is entered.
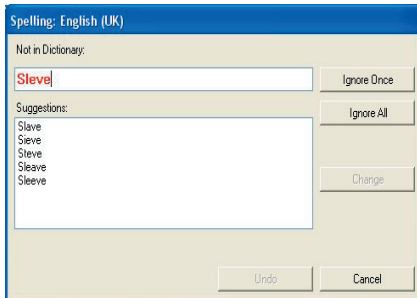
The word is then accepted for this record pending the validation within Manager.

7.4.5.3.2 Ignore All

Ignore All will add the word to a Pending list within Manager for the Project Administrator to confirm and will no longer query the spelling each and every time it is entered within the batch.

The word is then accepted for all records pending the validation within Manager.

Once accepted within Manager the word will be added to the project dictionary and will no longer be queried for any project using the same dictionary.

7.4.5.4 Virtual length

If the text field has been set up in Manager as having Virtual length the indexer will be able to add as many characters and words as they wish.

At the point that the number of entered characters exceed to length of the field the background colour will change (see fig. 7.4.5.4). In the example shown the entry is 29 characters. As soon as it is abbreviated below the allowed 20 characters the field colour will revert.

Fig 7.4.5.4a - Virtual field length indication
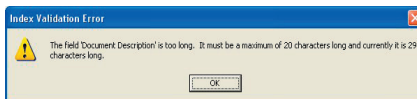
Fig 7.4.5.4b - Field length too long error

46

If the operator moves on to the next record without correcting the length the error message (fig.7.4.5.4b will be displayed.

Clicking the OK button will allow the indexer to correct the field.

7.4.5.5 Limited characters accepted

Where a text field has been set to only accept a limited number of characters, i.e. all upper case or all numerics, then no other entries are accepted regardless of what is keyed in. There is no warning message displayed.

If the field has been limited too severely and the indexing instructions require other entries to be allowed, contact the project administrator to make the changes.

7.4.5.6 Mask

Where a field is expected to be in one or more fixed formats, i.e. invoice numbers containing a set pattern - ABC1234, a mask can be set to ensure accuracy of data entry that will only allow entry that matches this mask.

If incorrect data is entered an error message will be displayed at validation time on leaving the record (see fig. 7.4.5.6).
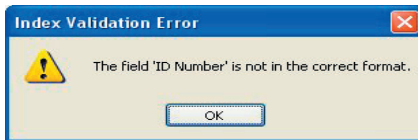

Fig 7.4.5.6 - Mask error

47

If this limits the data entry beyond what is required to be entered contact the project administrator requesting the necessary changes.

7.4.5.7 Filter

Where a filter has been set on a text field in the setup process, one of three actions will occur.

7.4.5.7.1 Upper case

All characters entered will be converted to upper case

7.4.5.7.2 Lower case

All characters entered will be converted to lower case

7.4.5.7.3 Sentence case

The first character of each and every word will be converted to upper case and all remaining characters will be converted to lower case.

7.4.6 Currency Field

Where only a single currency is to be entered, the field appears like a numeric field and only allows entry of two digits after the decimal point.

Where multiple currencies have been configured (see fig. 7.4.6) the operator can select from the options within the currency list box.

Non-selection will leave the default currency selected by the project administrator.
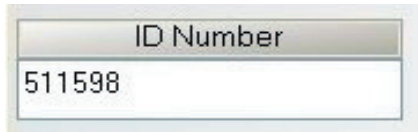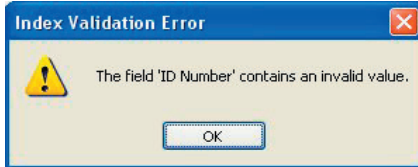
Fig 7.4.6 - Currency field

48

ID Number

511598

Fig 7.4.7.1 - Numeric field

Index Validation Error

⚠ The field 'ID Number' contains an invalid value.

OK

Fig 7.4.7.2 - Numeric field entry error

Move Data Back Move Data Forward Insert Blank Append Blank Replace With...

Delete Clear Record Save Stop Task Accept Batch

Fig 7.5 - Index task bar

7.4.7 Numeric field

A numeric field (see fig. 7.4.7.1) can be set to accept both positive and negative numbers and maximum and minimum values.

If incorrect data is entered an error message will be displayed at validation time on leaving the record (see fig. 7.4.7.2) allowing the operator to return to the field and correct the entry.

7.5 Index Tasks

Index tasks appear as a series of buttons (see fig. 7.5). Some of these tasks duplicate those available within Scan QA and should therefore only be required occasionally, i.e. Insert, Append, Replace and Delete.

7.5.1 Move Data Back/ Forward

Every index entry against a record creates a 'start of document' flag. If this entry is against the wrong image (i.e. page 2 of the new document or the last page of the previous document) it is possible to move the entire index entry backwards or forwards.

The entry may be moved more that one position in any direction but if there is an indexed record between the current position and the required position, that record will be deleted.

7.5.2 Insert Blank

Insert Blank places a blank record before the image being displayed in the image window and marks it as shown in fig. 7.5.2.

Once inserted, this blank record may be replaced with an image previously created (see section 7.5.4) or left blank for Scan QA to replace.

7.5.3 Append Blank

Append Blank will add a blank record after the last image in the batch, regardless which image is currently displayed and marks the record as shown in fig. 7.5.3.

Once inserted, this blank record may be replaced with an image previously created (see section 7.5.4) or left blank for Scan QA to replace.
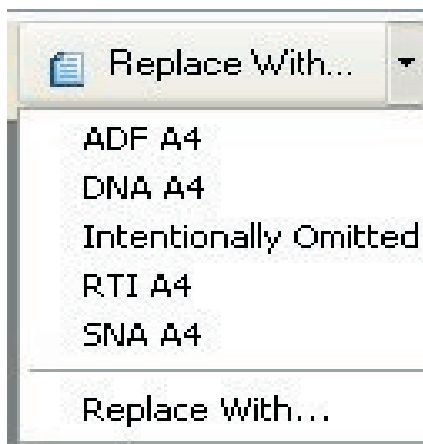
7.5.4 Replace With

It may be necessary to replace an image with a previously scanned one, e.g. a large format image or a colour image or Insert Blank and replace this with a standard image.

Click the 'Replace with' button to display the browse window. Locate the correct image and click Open to replace the displayed image.

Fig 7.5.2 - Insert Blank

Fig 7.5.3 - Append Blank

Fig 7.5.4 - Reokace With

50

To replace the image with a standard image (e.g. a folder section containing no documents) select one of the listed documents (see fig. 7.5.4). The standard image will be displayed

The description for these standard images is shown in section 6.5.2 table 6.5.2.3.

This list of images can be added to by saving any image file in the Images folder under the Capgen 3 folder (containing the application) i.e. ...\Capgen3\Images.

Next time that a batch is opened in QA or Index mode, the new images will be listed.

7.5.5 Delete

Where an image is not required (i.e. a folder divider) click the Delete button to mark the image 'To be Deleted'.

Images are not deleted until the batch is exported and can be 'undeleted', if necessary, by clicking the Delete button again.

7.5.6 Clear Record

Clear record will remove any index entry made against the displayed image. It will not affect any other records.

7.5.7 Save

7.5.8 Close Index mode

7.5.8.1 Stop Task

When Indexing is to be discontinued (i.e. end of operator shift), Stop Task will close the Index mode but not mark the batch as completed.

NB It is important to close the Index mode via the correct method as this is used within the reporting and exporting modes.

7.5.8.2 Accept Batch

When Index for the current batch is completed, Accept Batch will close the Index mode and mark the batch as completed. (see note in section 7.5.8.1).
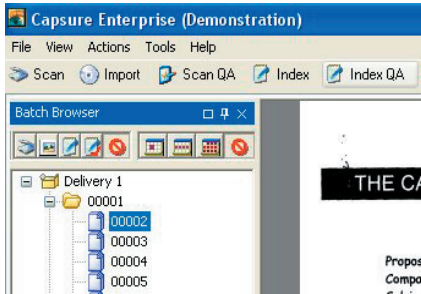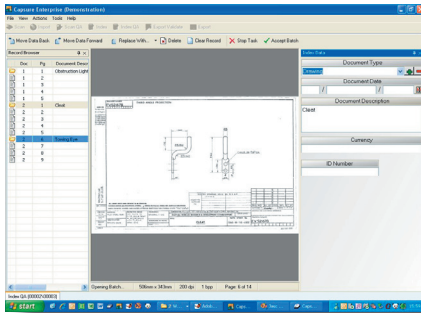
8. Index QA

Fig 8.0.1 - Select Index QA

Fig 8.0.2 - Index QA pane

Index Quality Assurance (QA) involves entering specified index data a second time into blank fields. The two entries are compared electronically and any discrepancies are brought to the notice of the indexer.

Select the batch to be index QAd and click the Index QA button on the tool bar. (see fig. 8.0.1).

The pane will change to Index QA mode view (see fig. 8.0.2) and is composed of the following elements:

1. Image pane
2. Record browser tab
3. Information bar
4. Index panel
5. Index QA tasks

8.1 Image pane

On selecting Index QA, the image pane will display the first imageof the first document in the batch.
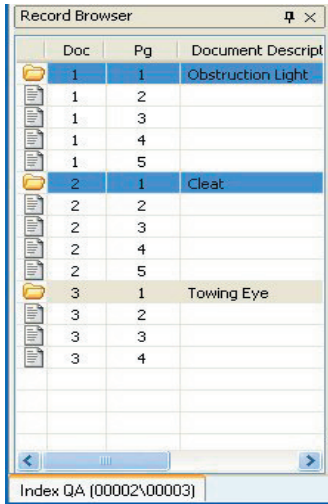
Use the Page Up/Down keys to move through the documents.

Fig 8.2.1 - Index QA record browser

8.2 Record browser tab

On selecting a task, the tab label at the bottom of the Record Browser (see fig. 8.2.1) will display the following:
- Mode (Import, QA, Index QA etc)
- Consignment Number
- Batch number

The Batch Browser is no longer displayed as the working batch is now fixed.

Column 1 in the Record Browser shows the definition of the image:
- Individual page (page icon)
- Document (folder icon)
- Any deleted record (bin icon)

The indication of a deleted image can be configured using <Tools>< Options><Highlights>.

Column 2 shows the Document Number within the batch.

Column 3 shows the page number within the document.

Column 4 shows the designaged Title field data.

Fig 8.3.1 - Index QA information bar

Fig 8.4.1 - Index data

Fig 8.4.2 - Index QA entry screen

8.3 Information bar

The information bar (see fig. 8.3.1) appears at the bottom of the image pane and is used to display the following:

- size of image in mm
- dots per inch of image (dpi)
- depth of colour
  - 1=b&w
  - 8=greyscale
  - 24=full colour
- position within the batch as an image of image total.

8.4 Index Panel

The Index panel will display previously entered data that does not require double entering (Index QA)

The figure 8.4.1 shows the entry from Index mode and figure 8.4.2 shows the same data panel for Index QA.

The two fields Document Date and ID Number have been designated Double Index and are therefore displayed as blank. All other fields are displayed as entered within Index.

All rules set for indexing (see section 7 Index) still apply within Index QA. Any fields can be corrected at this time, not just the fields designated Double Entry.

Fig 8.4.3 - Index QA discrepancy window

Make corrections if required and enter blank fields. These 'Double Entry' fields are compared electronically and any discrepancies are displayed to the operator. (see fig. 8.4.3).

Check the data against the image and select the correct entry (entered in Index or Index QA) or, if both are incorrect, enter the correct value.

After Index QA has been completed, no further electronic comparison are done although the data can still be edited within Index if required.

8.5 Index QA Tasks

Index tasks appear as a series of buttons (see fig. 7.5). Some of these tasks duplicate those available within Scan QA and should therefore only be required occassionally, i.e. Insert, Append, Replace and Delete.

8.5.1 Move Data Back/ Forward

Every index entry against a record shows a 'start of document' flag. If this entry is against the wrong image (i.e. page 2 of the new document or the last page of the previous document) it is possible to move the entire index entry backwards or forwards.
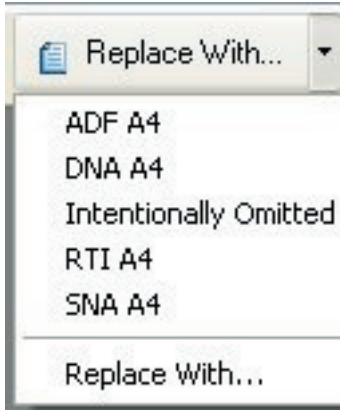
56

The entry may be moved more that one position in any direction but if there is an indexed record between the current position and the required position, that record will be deleted.

8.5.2 Replace With

It may be necessary to replace an image with a previously scanned one, e.g. a large format image or a colour image or Insert Blank and replace this with a standard image.

Fig 8.5.2 - Replace With...

Click the 'Replace with' button to display the browse window. Locate the correct image and click Open to replace the displayed image.

To replace the image with a standard image (in the case of a folder section containing no documents) select one of the listed documents (see fig. 8.5.2). The standard image will be displayed

The description for these standard images is shown in section 6.5.2 table 6.5.2.3.

This list of images can be added to by saving any image file into the Images folder under the Capgen 3 folder (containing the application) i.e. ...\Capgen3\Images.

Next time that a batch is opened in QA or Index mode, the new images will be listed.

8.5.3 Delete

Where an image is not required (i.e. a folder divider) click the Delete button to mark the image 'To be Deleted'.

Images are not deleted until the batch is exported and can be 'undeleted', if necessary, by clicking the Delete button again.

8.5.4 Clear Record

Clear record will remove any index entry made against the displayed image. It will not affect any other records.

8.5.5 Close Index mode

8.5.5.1 Stop Task

When Indexing is to be discontinued (i.e. end of operator shift), Stop Task will close the Index mode but not mark the batch as completed.

NB It is important to close the Index mode via the correct method as this is used within the reporting and exporting modes.

8.5.5.2 Accept Batch

When Index for the current batch is completed, Accept Batch will close the Index mode and mark the batch as completed. (see note in section 8.5.5.1).

9. Export Validate

Fig 9.0.1 - Select Export Validate

Fig 9.0.2 - Export Validate Progress

Fig 9.0.3 - Export Validate Message Tab

Export Validation is the process of checking all images and data against the Validation rules set up with the project.

Any or all of the export checks listed below may have been configured for the project.
1. Field Numbering Check
2. First Page Bookmarks
3. First Page Index Check
4. Image Assessment Check
5. Image Check
6. Mandatory Field Check
7. Multi Field Numbering Check
8. Spelling Queries Check
9. Task Complete Check

Select either a single batch or a full consignment then click the Export Validate button on the tool bar.

On selecting Export Validate, the Progress window shown in fig.9.0.2 is displayed. If no errors are found then the progress will display 'Done' on both bars.

If any errors are found the top bar will display 'Failed'. To find the error, select the 'Messages' Tab (see fig.9.0.3)

Errors will be listed with a description of the error along with the consignment, batch, document and page number (see fig.9.0.3).

Correct the error and then redo the Export Validate. Only when this has shown as completed successfully should the batch be Exported.
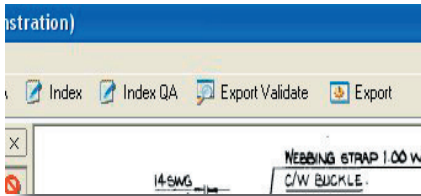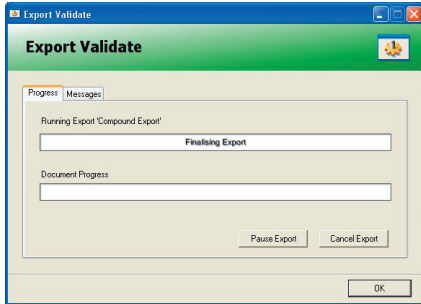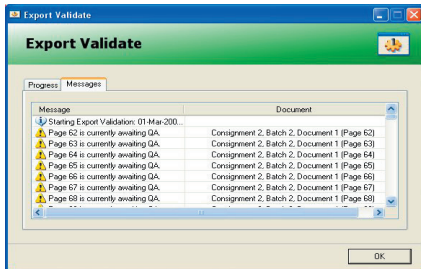
10. Exporting

Exporting is the means of preparing data and images in the correct format for importing into a document management system.

All export specs initially run the Export Validation routines proscribed by the Project administrator within Capsure Manager. Any validation errors will be logged and can be checked via Capsure Manager. The export will be flagged as failed.

Fig 10.0.1 - Select Export

To run any available export, select the Export button from the Tool bar (see fig. 10.0.1).

This will display the Start Export window (see fig. 10.0.2).

Select the required features:
1. Export Spec
2. Priority
3. Data Only
4. Archive On Success

10.1 Export Spec

Fig 10.0.2 - Start Export window

There three types of export specs available are as follows:
1. Debug Export
2. Find and View Export
3. Custom Export (may be individually named when created)

The drop down list box will display all export specs created for the current project.
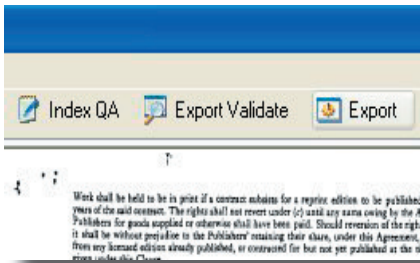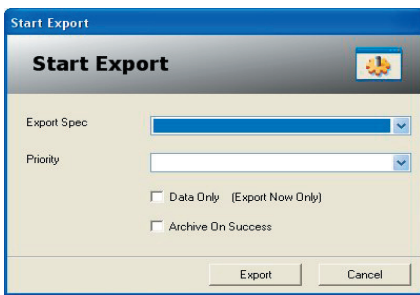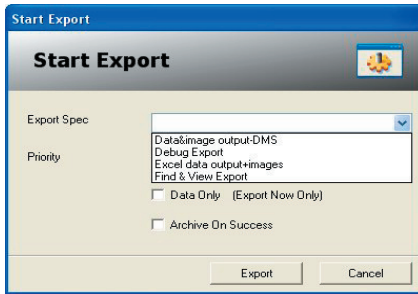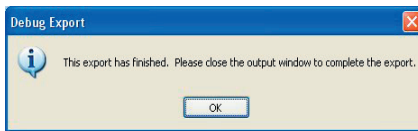
Fig 10.0.3 - Export Spec selection
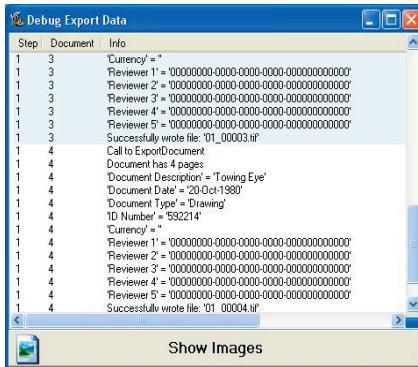

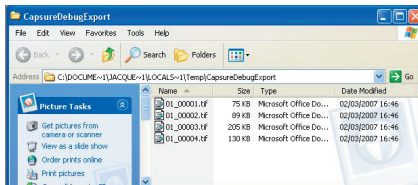Fig 10.1.1.1 - Debug close prompt

Fig 10.1.1.2 - Debug window

Fig 10.1.1.3 - Temporary image folder.

In the example shown in fig.10.0.3 the data and images can be output for use within a Document Management system, within MS Excel or passed to Find & View.

In addition the export process can be checked within the Debug export.

Any number of custom or debug exports may be done for any batch.

10.1.1 Debug Export

This is a temporary export used to ensure that the data and documents are going to be exported as expected.

Neither Data nor documents are retained after checking.

On the export pc, a prompt will be displayed (see fig. 10.1.1.1). Click OK after reading.

The Debug window (see fig. 10.1.1.2) can be used to check that the documents are being correctly constructed, the data exported in the correct format and the images correctly named.

The images themselves can be viewed by clicking on the 'Show Images' button at the bottom of the Debug window (fig. 10.1.1.2) to display the temporary image folder. (see fig. 10.1.1.3),

Double clicking any image will display the document in your chosen viewer.

Once all aspects of the export have been confirmed, close the debug window to complete the export and delete all temporary files.

10.1.2 Find & View Export

The Find & View export passes control of the documents and data to Find & View and removes them from all Casure Enterprise lists.

If a batch is required for alternate export but has already been passed to Find and View, contact the project Administrator to transfer the control back to Capsure.

NB On completion of all Capsure exports the batch(s) would then require re-exporting to Find and View.

Find & View Exports are always run on the PC that initiated the export.

10.1.3 Custom Exports

Custom Exports can produce any combination of data and image required and set up by the project administrator.

If the export spec is set up to OCR the images but the export PC is not licensed to run Abbyy OCR then the export will fail. (see fig. 10.1.3)
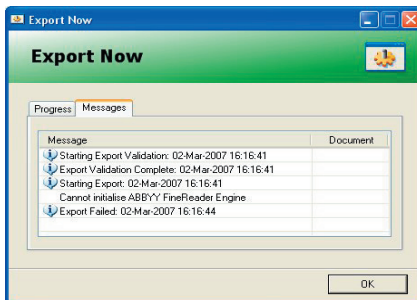
10.2 Priority

Exports can be set to one of three priorities
1. Normal
2. Fast Track
3. Export Now!

Fig 10.1.3 - Error report for No Abby license

10.2.1 Normal

This is will add the required export to the export queue and will then be actioned in sequence by the export PCs.

10.2.2 Fast Track

This adds the required export to the export queue and will be actioned by the next available export PC ahead of all previously added 'Normal' exports and after any previously added 'Fast Track' exports.

10.2.3 Export Now!

This will export the documents on the current PC.

Any validation errors will be reported in the same way as with the Export Validation process (see section 9).

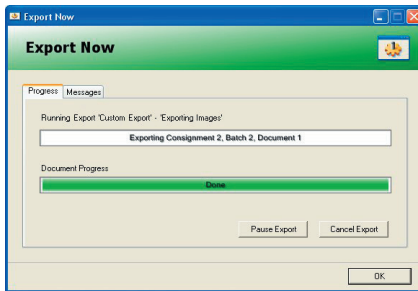The progress of the export will be displayed as shown in fig. 10.2.3.1

10.3 Data Only export

If required, any custom export can be set to export only the data and not the images. This is especially useful if the index data has been corrected after the images have been exported but the document structure has not been changed.

Select the required custom export, priority Export Now! and tick the box for 'Data Only'. The data will be exported to the expected location.

Fig 10.2.3.1 - Export Now! progress

10.4 Archive On Success

If required, the batches/consignments selected for export can be automatically archived on the completion of a successful export.

Click the tick box if required.

NB if mulitiple exports are being done on the same documents, ensure that the Archive on Success is only set for the last Export set.