Start the application

Select **Start → Programs → ABBYY FlexiCapture 9.0 → ABBYY FlexiCapture 9.0 Administrator Station** to start the standalone version, or **Start → Programs → ABBYY FlexiCapture 9.0 Stations → Project Setup Station** to start the distributed version.

What is a project?

A project is a single environment for document batches and their processing settings (Document Definitions, image import profiles, etc.). You need to create and set up at least one project to be able to process documents.

Create a new project

When you start the program, the **Open Project** window appears. Click **Create New…** to create a new project. If ABBYY FlexiCapture 9.0 is already running, click **File→New Project…**

Next, provide a name for your project and specify the folder where the project should be stored. Then click **Create**.

Create Document Definitions

Creating a Document Definition is the most important stage which affects the quality of captured data. To create a Document Definition:

- Select static elements on the image. Then specify which static elements are to be used for selecting or identifying the Document Definition.
- Specify the locations of the fields from which to extract data.
- Define the properties of each field: what types of data are to be found in each field (this considerably increases recognition quality), which fields are to be submitted for verification, etc.
- Specify rules for checking field values if necessary. These rules help to spot documents with values that do not meet certain criteria. For example, a rule can be used to check if a field value matches the corresponding value in a database.
- Configure data export. Data can be exported to a file or to a database, or as specified in an export script.

After the Document Definition has been created, you need to publish it. Only published Document Definitions are used for data capture.

To create a new Document Definition, click **Project→Document Definitions...**, then click **New…**, and adjust the settings.

Load or scan in an image based on which the Document Definition will be created. If you need to create a flexible Document Definition, load a FlexiLayout file (FlexiLayouts are created in FlexiLayout Studio).

If required, add more pages and/or sections to your Document Definition and then add their images (for a section, you can load a FlexiLayout).

When creating a regular Document Definition, you need to specify the fields to be detected on the image. You can add checkmarks and text entry fields. Automatic search is more efficient when there are text fields with markup and rectangular checkmarks. If entry fields have no markup and checkmarks are placed against a white background, they are usually selected manually. If there are anchors on the form, they will be found and highlighted automatically. Make sure there are enough anchors to reliably select the right Document Definition.

Specify the field properties (data type, recognition parameters, verification method, etc.). You may also need to specify the rules for automatic verification of recognition results.

Set up the export of recognized data and images. Data can be exported to multiple destinations, each can be either required or optional. If an error occurs during export to a required destination, export fails. Errors that occur during export to optional destinations are ignored.

Change the display of recognized data if required.

Test the Document Definition on test batches and make any necessary adjustment. Once the Document Definition has been edited, publish it by clicking **Publish** in the **Document Definitions** window.

To edit a Document Definition, select it in the **Document Definitions** window and click **Edit…** The local copy of the Document Definition will be edited. To make the edited Document Definition accessible to all users, publish it. To apply a Document Definition to the documents that are being processed, the operator must select the documents and click **Tools→Update to Latest Version** on the main menu.

Create batch types and specify processing parameters for the project

If different parameters are to be used for processing different documents, you can create a separate batch type for each type of document. A batch type defines the following document processing parameters:

- document pre-processing
- the list and order of Document Definitions to be applied

- batch integrity check
- default export options
- registration parameters (this is textual information that describes a batch)

Next, users choose the appropriate processing settings by simply selecting a the required batch type when creating a batch.

Similar parameters are specified for the whole project. Project-level settings are used for batches of type “Default.”

To create or edit a batch type, open the **Batch Types** window by clicking **Project→Batch Types…** on the menu. Next, click **New…** to create a new type or select a type and click **Edit…** to edit an existing batch type.

To set up the parameters for the entire project, click **Project→Properties…** on the menu.

Create image import profiles

You can specify image import and processing parameters for frequently repeated jobs. This is done by creating one or more import profiles that contain information about the image sources and document processing settings (despeckling, color mode, etc.). Next, users can choose the appropriate image import settings by simply selecting the required image import profile.

If an import profile is used to load images, the settings specified for the batch type or the entire project are ignored.

To create an image import profile, click **Project→Image Import Profiles…** on the menu. Then click **New…** to create a profile or select an existing profile and click **Edit…** to edit an existing import profile.

To start monitoring a hot folder for images, do the following:

- In standalone mode: select **Autochecking** in the **Image Import Profiles** window.

- In distributed mode: use the **Processing Server Monitor** and specify the option separately for each project in the **Hot Folders** section.

Publish the project

In standalone mode, you can start working with the project right after it has been saved to the hard drive. In distributed mode, you need to upload the locally saved project to the server by selecting **File→Upload Project to Server…** on the menu.

Keyboard shortcuts

You can use the following keyboard shortcuts for the most commonly used operations:

Main window	
New project	Ctrl+Shift+N
Test batches	Ctrl+Shift+B
Match Document Definition	Alt+Shift+E
Document Definitions	Ctrl+T
Batch types	Ctrl+Shift+T
Image import profiles	Ctrl+Shift+I
Help	F1
Document Editor window	
Add a page	Ctrl+P
Add a document section	Ctrl+Alt+S
Find objects on the image	Ctrl+D
Document Definition properties	Ctrl+T
Start testing	Ctrl+R
Check Document Definition	F9
Match document definition section	Ctrl+E
View the properties of an object	Alt+Enter
Help	F1