FileDirector
ELECTRONIC CONTENT MANAGEMENT

AutoCapture Demo Setup
Quick Guide

Spielberg
POWERED BY EFALIA

Disclaimer

Spielberg Solutions GmbH makes no representation or warranties with respect to the contents or use of this document and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Spielberg Solutions GmbH reserves the right to revise this publication and to make changes to its content, at any time, without obligation to notify any person or entity of such revisions or changes.

Further, Spielberg Solutions GmbH makes no representations or warranties with respect to any FileDirector software, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Spielberg Solutions GmbH reserves the right to make changes to any or all parts of FileDirector software, at any time, without obligation to notify any person or entity of such changes.

Copyright

© 2023 Spielberg Solutions GmbH. All Rights Reserved.

No part of this document may be reproduced, transmitted or stored in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Spielberg Solutions GmbH.

FileDirector is a registered trademark of Spielberg Solutions GmbH.

Windows is a registered trademark of Microsoft Corporation in the United States and other countries.

Other product and company names mentioned herein may be trademarks of their respective owners.

Africa, Asia, Australia, Europe and USA

Spielberg Solutions GmbH
Obere Kaiserswerther Str. 17
D-47249 Duisburg
Germany
Email: info@spielberg.de
Web: www.spielberg.de

UK and Eire

Spielberg Solutions Ltd
Unit 11
Basepoint Business & Innovation Centre
Metcalf Way, Crawley
RH11 7XX, UK
Email: info@spielbergsolutions.com
Web: www.spielbergsolutions.co.uk

Software Licence Agreement

IMPORTANT: Read this agreement before installing FileDirector. By installing FileDirector you are deemed to agree to be bound by this agreement.

This licence agreement is a legal document between you and Spielberg Solutions GmbH. If you do not agree to the terms of this agreement return the software CD and accompanying documentation (the "Documentation") and other items to the place from where you obtained them for a refund before they are marked or damaged in any way.

In consideration of the right to use the Software you agree to abide by the terms and conditions of this agreement.

GRANT OF LICENCE

The Software consists of the software modules by:

Spielberg Solutions GmbH, a German public listed company having its place of business at Obere Kaiserswerther Str. 17, 47249 Duisburg, Germany ("Spielberg");

Microsoft Corp., a Washington Corporation having its place of business at 1 Microsoft Way, Redmond, WA 98052-6399, USA ("Microsoft");

MICROPLEX Trading GmbH, a German Company having its place of business at Leipziger Chaussee 191g, 06112 Halle, Germany ("Microplex");

Kofax Inc.., a Californian Company having its place of business at 15211 Laguna Canyon Road, Irvine, CA 92618-3146, USA ("Kofax;");

Developer Express Inc., a Nevada company having its place of business at 6340 Mcleod Dr. Suite1, Las Vegas, NV 89120, USA ("DevExpress");

Dell EMC Corporation, a Massachusetts company having its place of business at 176 South Street, Hopkinton, Massachusetts 01748, USA ("EMC");

Oracle Corporation, a Californian company having its place of business at 500 Oracle Parkway, M/S 5op7, Redwood Shores, California 94065, USA ("Oracle");

PDFTron Systems Inc., a British Columbia corporation, having offices at 838 West Hastings Street, Suite 500, Vancouver, British Columbia, V6C 0A6, Canada ("PDFTron").

The software consists also of Open Source modules, listed below:

Software, which is based in part on the work of the Independent JPEG Group.

Cryptographic software written by Eric Young (eay@cryptsoft.com).

It uses the FreeImage open source image library. See http://freeimage.sourceforge.net for details.

FreeImage is used under the FreeImage Public License (FIPL) version 1.0.

LibTIFF Copyright (c) 1988-1997 Sam Leffler

LibTIFF Copyright (c) 1991-1997 Silicon Graphics, Inc.

LibTIFF: Permission to use, copy, modify, distribute, and sell this software and its documentation for any purpose is hereby granted without fee, provided that (i) the above copyright notices and this permission notice appear in all copies of the software and related documentation, and (ii) the names of Sam Leffler and Silicon Graphics may not be used in any advertising or publicity relating to the software without the specific, prior written permission of Sam Leffler and Silicon Graphics.

You understand and acknowledge that any software module included in the Software may have utility with or be able to be called by other software and/or hardware, which Spielberg considers to be an unauthorised use of the Software. Accordingly, you agree that you will use such software modules only as part of the Software and not in conjunction with, or as part of, or as a component of other software and/or hardware which makes calls to such software modules.

Spielberg grants you the personal non-exclusive rights:

For a single-user version of the Software, to install and use the Software for internal purposes only on a single computer (the Software is considered in use when it is installed in the temporary memory, i.e. RAM, or the permanent memory, i.e. Hard Disk Drive).

For a multi-user version of the Software, to install and use the Software for internal purposes only for the number of computers or simultaneous users identified in the Installation Configuration sheet of the Software package (for example, if you have purchased a 5-User licence you may install the Software for simultaneous use by up to 5 Users on a network).

BACKUP COPY

You may make whatever copies you deem appropriate from the FileDirector "delivery" Compact Disc, the Programs, Example Files and any other promotional material that may be included thereon. The Application Manual, or any part thereof, may be reproduced in sufficient quantity to support only the number of users licenced to you and no more. You must reproduce and include on the backup copy the copyright notice and other ownership or proprietary legends that are on the original copy of the Software.

You may NOT make or attempt to make any copy whatsoever of the FileDirector Licence. ANY ATTEMPT TO COPY, TRANSFER OR RESTORE THE LICENCE MAY CORRUPT THE ENABLING LICENCE. The Licence, once enabled, represents the full purchase value of the licence to use the FileDirector Software. The enabled Licence can be manipulated ONLY by the commands within the FileDirector application.

RESTRICTIONS

You may not market, distribute or transfer the Software or the Documentation to others, or electronically transfer the Software from one computer to another over a network except as expressly provided herein.

You may not de-compile, reverse engineer, disassemble or otherwise reduce the code of the Software to a human perceivable form.

You may not modify, adapt, translate, rent, lease or loan the Software or the Documentation or create derivative works based on the Software or the Documentation.

OWNERSHIP AND COPYRIGHT

Spielberg, Microsoft, Microplex, Kofax, DevExpress, PDFTron and Pixel reserve all rights to their respective software modules of the Software and the Documentation. The Software and the Documentation is copyrighted. Unauthorised copying of the Software, including portions thereof, or the Documentation is expressly forbidden.

EXPORT CONTROL

You agree that the Software and Documentation will not be shipped, transferred or exported into any country or used in any manner prohibited by the United States Export Administration Act or any other applicable export control laws, restrictions or regulations of the countries involved.

SUPPORT AND UPDATES

Spielberg, Spielberg's subsidiaries or affiliates, their distributors and dealers are not responsible for maintaining or helping you to use the Software and the Documentation, excepting where agreements have been entered into between specific parties, i.e. Spielberg: Distributor, Distributor: Dealer, Dealer: End User.

No updates, fixes or support will be made available for the Software and Documentation other than by publishing such revisions on the Spielberg web site: http://www.spielberg.de or http://www.filedirector.com

Any updates, fixes or support will be made available on the said web site solely at the discretion of Spielberg, who is under no obligation whatsoever so to do.

LIMITED WARRANTY AND DISCLAIMER OF INDEMNITY

Limited Warranty. The Software and documentation is provided "as is" without warranty of any kind, either express or implied, including, but not limited to implied warranties of merchantability and fitness for a particular purpose. The entire risk as to quality and performance of the Software and documentations is with you. Should the Software prove defective you (and not Spielberg, Spielberg's affiliates, their distributors or dealers) assume the entire cost of all necessary servicing, repair or correction. Some states or jurisdictions no not allow the exclusion of implied warranties, so the above exclusion may not apply to you. This warranty gives you specific legal rights and you may also have other rights which vary according to state or jurisdiction.

Spielberg, Spielberg's affiliates, their distributors and dealers do not warrant that the functions contained in the Software will meet your requirements or that the operation of the Software will meet your requirements or that the operation of the Software will be uninterrupted or error free.

However, Spielberg or Spielberg's affiliates warrants a compact disc or diskette on which the Software is stored to be free from defects in materials and workmanship under normal use for a period of ninety (90) days from the date you purchased the same, as evidenced by a receipt or otherwise. Some states or jurisdictions do not allow limitations on duration of an implied warranty, so the above limitation may not apply to you.

CUSTOMER REMEDIES

Spielberg's entire liability and your exclusive remedy shall be the replacement of the Compact Disc and/or Diskette not meeting the LIMITED WARRANTY and which is returned to Spielberg or Spielberg's marketing affiliate, Spielberg Solutions Limited, with a copy of your receipt or otherwise. The LIMITED WARRANTY is void if failure of the Compact Disc has resulted from accident, abuse or misapplication of the software.

No liability for consequential damages. In no event shall Spielberg, or Spielberg's affiliates, their distributors or dealers be liable for any damages whatsoever (including without limitation, direct or indirect damages for personal injury, loss of business profits, business interruption, loss of business information, or other consequential or incidental damages) arising out of the software, the use thereof or inability to use the software even if Spielberg, Spielberg's affiliates, their distributors or dealers has been advised of the possibility of such damages. Some states or jurisdictions do not allow the exclusion or limitation of liability for consequential or incidental damages, so the above limitation may not apply to you.

Disclaimer of indemnity. Spielberg, Spielberg's affiliates, their distributors and dealers shall have no obligation to indemnify you against any claim or suit brought to you by a third party alleging that the Software or the use thereof infringes any intellectual property of such third party.

TERM

This agreement is effective upon the installation of FileDirector Server and Client and remains in effect until terminated. You may terminate this agreement by destroying the Software and any copy thereof. This agreement will also terminate if you fail to comply with any of the terms of this agreement. In addition to Spielberg enforcing its legal rights, you must then promptly destroy the Software and any copy thereof.

ACKNOWLEDGEMENT

By selecting the 'Yes, I accept the agreement' option during the software installation process, you acknowledge that you have read this agreement, understand it and agree to be bound by its terms and conditions. You further agree that this agreement is the complete and exclusive statement of agreement between you and Spielberg concerning the subject matter hereof, which supersedes any proposals or prior agreements, oral or written, and any other communication between you and Spielberg relating to the subject matter hereof. No amendment to this agreement shall be effective unless signed by a duly authorised representative of Spielberg.

Should you have any questions concerning this agreement, or if you desire to contact Spielberg for any reason, please write to your authorised supplier requesting that they pass your correspondence to Spielberg Solutions GmbH.

Table of Contents

Overview 7
SQL Full text catalogue 7

AutoCapture Fields Setup 8
Minimum requirements 9
Content of the drop-down menu AutoCapture 9
Content of the drop-down menu Contact 10

AutoCapture DocType Setup 13
FileDirector AutoCapture Inbox 13
FileDirector AutoCapture Processed documents 13

FileDirector AutoCapture Settings 15
Overview 15
Demo Cabinet Settings 15
General 15
Supplier settings 15
Matching fields 16

Clean supplier database 19
Reasons 19
Advantage 19
Disadvantage 19
Script 19
Important 19

Overview



The optional module FileDirector AutoCapture allows documents as invoices and credit notes to be automatically recognised and indexed.

FileDirector allows storing documents into multiple different AutoCapture target document types per cabinet.

> *Note:*
> *The FileDirector AutoCapture is able to recognise basic values of new suppliers without a training.*
> *This feature is only available when FileDirector AutoCapture is setup with a single document type "Processed documents".*

SQL Full text catalogue

A SQL Full text catalogue is not required for FileDirector AutoCapture but it is recommended.

AutoCapture Fields Setup



FileDirector AutoCapture fields are basically set-up in the same way, standard FileDirector fields are.

There are two types of fields, needed for FileDirector AutoCapture – *Contains: AutoCapture* and *Contains: Contacts*.

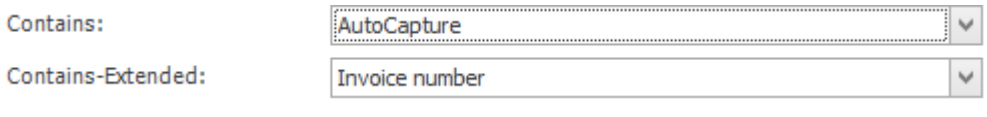
The type can be selected within the *General* tab of a FileDirector field.

See the drop-down list Contains:

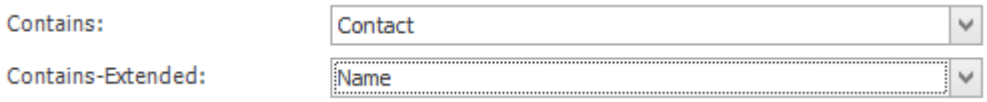


According to the selected type, the drop-down list *Contains-Extended* either offers different type of *AutoCapture* or *Contact* fields.

See below:



or



The FileDirector AutoCapture and Contact fields come with a default field length setting. This value, except for date fields, can be changed.

AutoCapture Demo Setup

Minimum requirements

For a demo setup, FileDirector AutoCapture requires:

Field content type AutoCapture

- A field *Invoice number*
- A field *Invoice date*
- A field *net amount*
- A field *tax amount*
- A field *gross amount*

Field content type Contact

A minimum of 5 fields are required. The field content type Contact is also used for matching.

Example

- A field *Name*
- A field *Address 1*
- A field *Zip Code*
- A field *City*
- A field *Tax #*

Content of the drop-down menu AutoCapture

When *Contains AutoCapture* is selected, the drop-down menu *Contains-Extended* shows the following options:

Invoice number

10 characters have been reserved for these fields with the field content definition *Any character*. This field is for invoice numbers, recognised by FileDirector AutoCapture.

Invoice date

10 characters have been reserved for these fields with the field content definition *Date*. This field is for invoice dates, recognised by FileDirector AutoCapture.

Order number

10 characters have been reserved for these fields with the field content definition *Any character*. This field is for order numbers, recognised by FileDirector AutoCapture.

Net1 amount; Net2 amount

12 characters have been reserved for these fields with the field content definition *NumbersPlus*. This field is for net amounts, recognised by FileDirector AutoCapture.

Tax1 amount; Tax2 amount

12 characters have been reserved for these fields with the field content definition *NumbersPlus*. This field is for tax amounts, recognised by FileDirector AutoCapture.

Gross amount

12 characters have been reserved for these fields with the field content definition *NumbersPlus*. This field is for gross amounts, recognised by FileDirector AutoCapture.

Discount amount

12 characters have been reserved for these fields with the field content definition *NumbersPlus*. This field is for discount amounts, recognised by FileDirector AutoCapture.

Advance Payment

12 characters have been reserved for these fields with the field content definition *NumbersPlus*. This field is for amounts of advanced payments, recognised by FileDirector AutoCapture.

Content of the drop-down menu Contact

When *Contains Contact* is selected, the drop-down menu *Contains-Extended* shows the following options:

ID

10 characters have been reserved for these fields with the field content definition *Numbers*. This field is for supplier IDs of the FileDirector AutoCapture routine.

Name

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier names, recognised by FileDirector AutoCapture.

Address1

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's street name and number, recognised by FileDirector AutoCapture.

Address2

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's street name and number, recognised by FileDirector AutoCapture.

ZIP Code

10 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's postcode, recognised by FileDirector AutoCapture.

City

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's city, recognised by FileDirector AutoCapture.

State

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's state, recognised by FileDirector AutoCapture.

Country

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's country, recognised by FileDirector AutoCapture.

Phone

10 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's phone number, recognised by FileDirector AutoCapture.

Fax

10 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's fax number, recognised by FileDirector AutoCapture.

WebSite

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's website, recognised by FileDirector AutoCapture.

VAT-ID

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's VAT identification number, recognised by FileDirector AutoCapture.

Tax #

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's tax number, recognised by FileDirector AutoCapture.

Bank name

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's bank name, recognised by FileDirector AutoCapture.

Bank #

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's bank number, recognised by FileDirector AutoCapture.

Account #

50 characters have been reserved for these fields with the field content definition *All characters*. This field is for supplier's account number, recognised by FileDirector AutoCapture.

AutoCapture DocType Setup

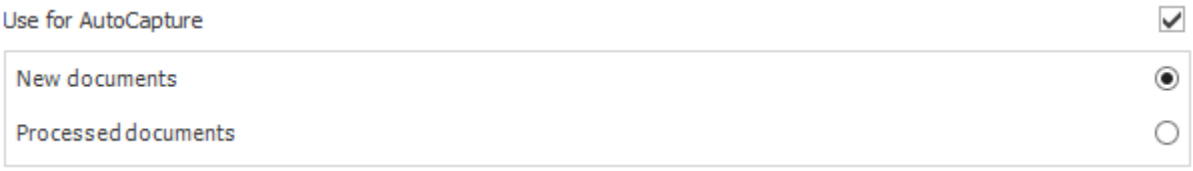
FileDirector AutoCapture document types are defined within the General tab of a created or selected document type.

The AutoCapture module uses two type of document types – an inbox and outboxes.

> *Note:*
> *It is recommended using only one document type for* Processed documents*. This allows FileDirector AutoCapture to use the* Intelligent Recognition *feature.*

FileDirector AutoCapture Inbox

A document type is specified as AutoCapture inbox by selecting the following two checkboxes on the tab *General*:



> *Recommendation:*
> *The AutoCapture inbox does not necessary require any fields. Nonetheless, it is recommended adding a date field for administrative purposes e.g.: Scan date/Import date.*

FileDirector AutoCapture Processed documents

A document type is specified as AutoCapture Processed documents by selecting the following two checkboxes on the tab *General*:



The document type used for FileDirector AutoCapture *Processed documents* must contain at least the following fields:

Field content type AutoCapture

- A field *Invoice number*
- A field *Invoice date*
- A field *gross amount*

Field content type Contact

A minimum of 5 fields are required for a proper matching. The field content type *Contact* is also used for matching.

Example

- A field *Name*
- A field *Address 1*
- A field *Zip Code*
- A field *City*
- A field *Tax #*

FileDirector AutoCapture Settings

Overview

The node AutoCapture in the FileDirector EnterpriseManager user interface, is used for the general settings like supplier data base and matching fields.

Note:
For demo environments, the supplier source Cabinet database *is recommended.*

Demo Cabinet Settings

General

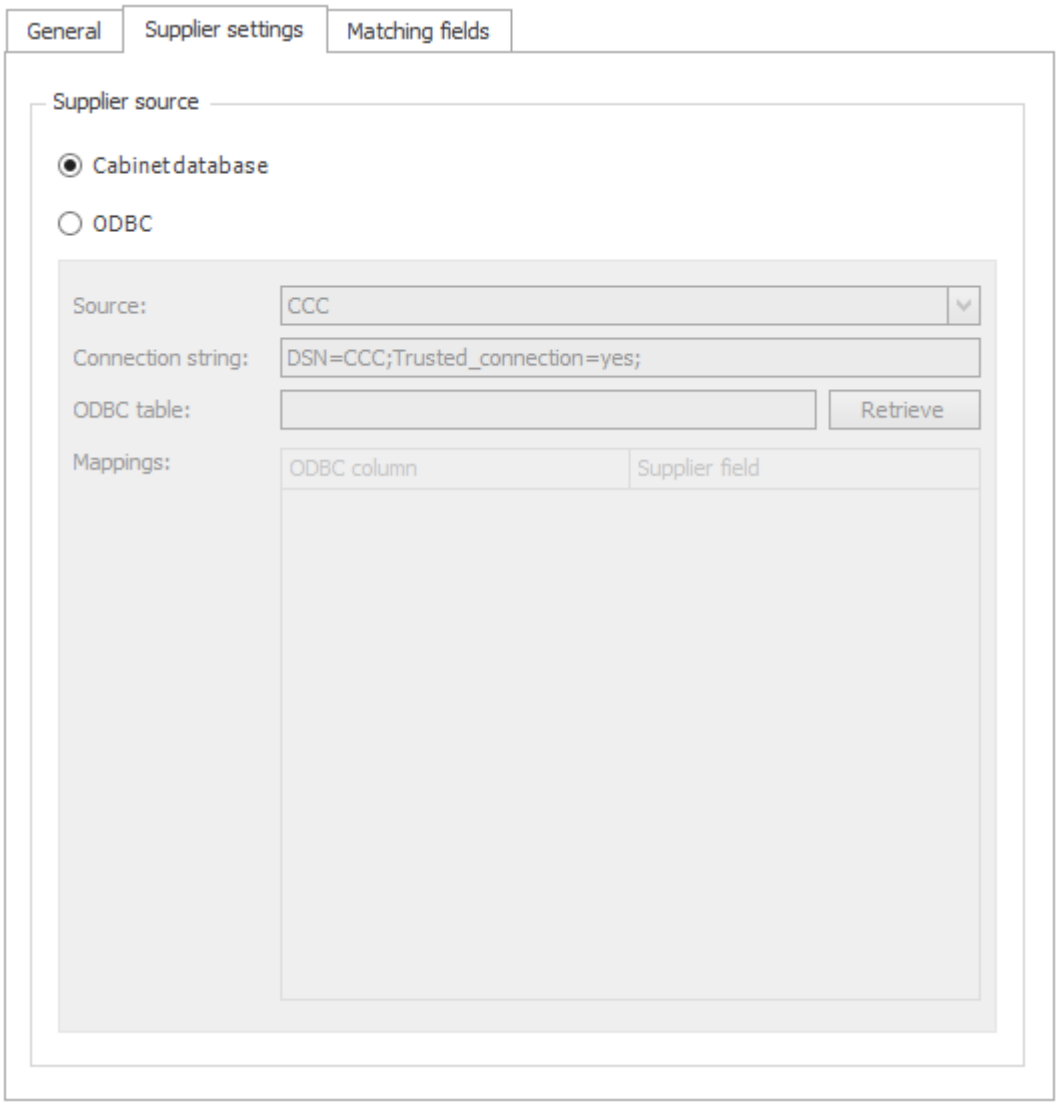
The default settings within the tab General need not to be changed.

Supplier settings

Creating a universal demo cabinet, it is easier using the option Cabinet database.

This allows a quick and fast cleaning of trained suppliers.

Screenshot



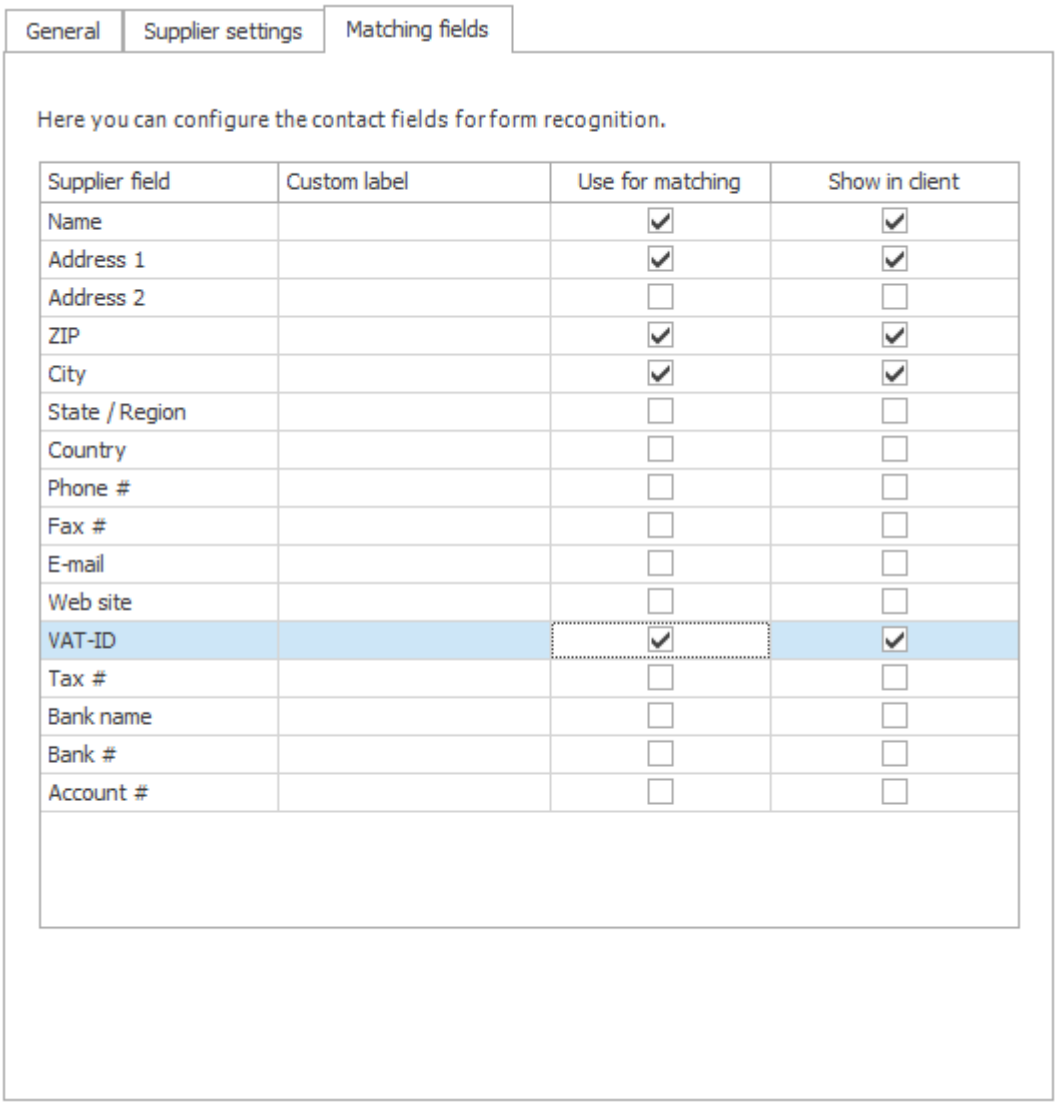
Matching fields

A minimum of 5 fields must be selected for matching.

There are no recommendations as the information printed on invoices varies in each country.

> *Note:*
> *Please ensure that the information selected for matching is printed on the invoices.*

Example



Supplier field	Custom label	Use for matching	Show in client
Name		☑	☑
Address 1		☑	☑
Address 2		☐	☐
ZIP		☑	☑
City		☑	☑
State / Region		☐	☐
Country		☐	☐
Phone #		☐	☐
Fax #		☐	☐
E-mail		☐	☐
Web site		☐	☐
VAT-ID		☑	☑
Tax #		☐	☐
Bank name		☐	☐
Bank #		☐	☐
Account #		☐	☐

Supplier field

This column lists all AutoCapture fields. These names are as they stand.

Custom label

Within this column, aliases can be set for one, multiple or all names listed in the column Supplier field.

These aliases are shown in the FileDirector AutoCapture Client instead of the original labels.

Use for matching

In this column, the rules for a clear identification can be set individually for each FileDirector system.

FileDirector AutoCapture uses an internal threshold value for a successful matching. The threshold value is 75% of the fields selected as *Use for matching*.

Example 1:

Only the minimum of three FileDirector AutoCapture fields have been selected as *Use for matching*, e.g. *Name*, *Address 1* and *ZIP*.

In this example, each field represents ~33.3%. In this case all three fields must be identified.

Example 2:

Four FileDirector AutoCapture fields have been selected as *Use for matching*, e.g. *Name*, *Address 1*, *ZIP* and *VAT-ID*.

In this example, each field represents ~ 25%. In this case three out of the four fields must be identified.

Example 3:

Seven FileDirector AutoCapture fields have been selected as *Use for matching*, e.g. *Name*, *Address 1*, *ZIP*, *City*, *Phone #*, *Tax #* and *VAT-ID*,

In this example, each field represents ~ 14,29%. In this case six out of the seven fields must be identified.

Five matching fields would be ~71,43% and below the required threshold value of 75%.

> *Note:*
> *At least* three *fields must be selected from the column* Use for matching*, when the default is changed.*

Show in client

This column defines, which *Supplier fields* are displayed in FileDirector AutoCapture Client when a document is displayed.

When a field is marked for both, *Use for matching* and *Show in client*, the name is displayed in bold.

Clean supplier database

Reasons

Using a supplier database stored within the FileDirector cabinet, allows fast a clean-up after a presentation and resets the trained suppliers.

Advantage

A clean database allows a presentation with a small standard range of documents.

Disadvantage

The feature *Intelligent recognition* is not available in a short presentation unless the minimum of 10 forms are trained.

Note:
The Intelligent recognition feature of FileDirector AutoCapture needs at least 10 trained forms.

Script

The following script allows a fast clean-up of the supplier and forms data stored in a FileDirector cabinet. The script can be stored and run using FileDirector Script option.

```
Use FD_Your Cabinet ID;
TRUNCATE TABLE Contacts;
TRUNCATE TABLE AutoCaptureForms;
```

Important

After the database wipe, the Windows Service *FileDirector Scheduler Service* must be restarted and and *IISreset* must be perfomed.