Oracle® Fusion Middleware

Using Oracle WebCenter Enterprise Capture

11*g* Release 1 (11.1.1)

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Documentation for users that describes how to use Oracle WebCenter Enterprise Capture to scan, import, and index documents.

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Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture, 11*g* Release 1 (11.1.1)

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Contents

3   Reviewing and editing documents

4   Indexing documents

5   Working with batches

A Troubleshooting

B Frequently Asked Questions

Preface

This guide describes how to use Oracle WebCenter Enterprise Capture to scan, import, index, and release documents.

Audience

This document is intended for users who use the Capture application, either on its own or through a business application, to capture and work with document batches. As described in Section 1.4, the Capture use may range from production environment to occasional use.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Client Accessibility Features

The following topics describe the Capture client features that support accessibility:

- Changing the Client Display to High Contrast
- Changing the Font Size Displayed in the Client
- Using Keyboard Shortcuts

Changing the Client Display to High Contrast

To change the display to high contrast:

1. Sign in to the Capture client. See Section 1.2.

2. Click **Preferences**. The Preferences window is displayed.

3. Select the **I use Windows accessibility features** field to change the client display to make use of accessibility settings provided by Windows for high contrast. You

must have your Windows environment set to use high contrast for this setting to work.

4. Click **Save**.

   Note that after changing this setting, you may need to restart the client to restore the display.

Changing the Font Size Displayed in the Client

To change font sizes:

1. Sign in to the Capture client. See Section 1.2.

2. Click **Preferences**. The Preferences window is displayed.

3. Select the **I use Windows accessibility features** field to change the client display to make use of accessibility settings provided by Windows for large fonts. You must have your Windows environment set to use large fonts for this setting to work.

4. In the **Font Size for Client** field, select a new font size for client buttons, labels, and other client window items. The minimum size is 8 point and the maximum size is 18 point.

5. In the **Font Size for Metadata Fields** field, select a new font size for metadata fields and labels. The minimum size is 8 point and the maximum size is 18 point.

6. Click **Save**.

   Note that after changing the Windows accessibility features setting, you may need to restart the client to restore the display.

Using Keyboard Shortcuts

For details on available keyboard shortcuts, see the following sections:

- About the Batch pane
- About the Document pane
- About the Metadata pane

Related Documents

For more information, see the following documents in the Oracle WebCenter Enterprise Capture documentation set:

- *Oracle Fusion Middleware Managing Oracle WebCenter Enterprise Capture*
- *Oracle Fusion Middleware Administering Oracle WebCenter Enterprise Capture*
- *Oracle Fusion Middleware Developing Scripts for Oracle WebCenter Enterprise Capture*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.

Convention	Meaning
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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Getting Started with Capture

This chapter describes how to get started using the Oracle WebCenter Enterprise Capture client. First the basics of Capture are introduced, including how Capture works with batches, documents, and profiles. After starting the client application, you learn how to navigate its panes. Lastly, you identify your Capture role by learning the main ways users use the client to scan, import, index, and work with document batches.

This chapter covers the following main topics:

- Understanding Capture basics
- Starting the Capture client
- Navigating the Capture client
- Capture client uses
- Setting preferences

1.1 Understanding Capture basics

This section describes what you need to know about Capture to start using it.

- About the Capture client
- About batches and documents
- About client profiles
- Which document types you can scan or import into Capture
- Understanding whether you can capture and index batches
- About processing and releasing batches

1.1.1 About the Capture client

The Capture client is Capture's user application for:

- Scanning and importing (capturing) documents
- Reviewing, editing, and indexing documents
- Releasing documents so that they can be further processed, checked into a content repository, or attached to business application records

The Capture client is a Java applet that is automatically downloaded when you connect to the Capture server through your browser or from a business application.

1.1.2 About batches and documents

Batches and documents are the primary drivers of work in Capture.

- As a client user, you scan or import groups of pages in **batches** using a **client profile**, which is defined by an administrator known as a Capture workspace manager. See Section 1.1.3.

- A batch contains one or more **documents**, which may be related (for example, multiple documents for a customer) or unrelated (for example, documents divided by separator sheets). A document may consist of scanned images or an electronic file such as a Microsoft Word or a PDF file. See Section 1.1.4.

- A batch can be **locked** or **released** (unlocked). A lock icon displays when a batch is locked by you or another user. Releasing a batch removes the batch icon's lock and depending on the client profile settings, frees the batch for another user or a system processor to work on. See Section 1.1.6.

Figure 1–1   Batches and Documents
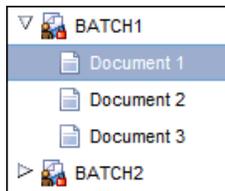
- If the client profile includes indexing, each document can be assigned **metadata** (index) values. A customer document might be assigned metadata values such as a customer ID and name. Documents of different types in a batch typically have different sets of metadata fields available. A **document profile** identifies the set of metadata fields to complete for a selected document.

1.1.3 About client profiles

A client profile is a group of settings you select to instruct Capture how to scan, import, or index a batch's documents. A client profile controls such things as scanner settings, how documents are created and separated in the batch, whether metadata fields are available and required, and what happens next to batches after you release them.

1.1.4 Which document types you can scan or import into Capture

In Capture, a document consists of one of the following:

- One or more images obtained from a scanner or imported from a file.

- A non-image, electronic file such as a Microsoft Word or a PDF file. When you import non-image files, the client profile determines if they are retained in their original format, converted to an image format, or prevented from being imported.

1.1.5 Understanding whether you can capture and index batches

The selected client profile determines whether you can use it to capture documents only, capture and index documents, or index documents only. You can tell the client profile's type by the toolbar buttons and panes that display when you select a document in the batch pane:

- If no metadata pane displays, the client profile is **capture-only**. Capture-only profiles do not include indexing.

- If metadata fields display in the lower left pane and capture buttons display in the batch pane, the client profile is **capture-and-index**.

- If metadata fields display in the lower left pane but no capture buttons display in the batch pane, the client profile is **index-only**. You can assign metadata values to documents in index-only batches, but cannot append, insert, or replace pages.

1.1.6 About processing and releasing batches

When you are done working on a batch's documents, you release the batch, which unlocks it from your use. What happens next depends on client profile settings:

- The batch may be removed from the batch pane list and committed elsewhere such as to a content repository, or it may be placed in a queue for further processing such as document conversion or bar code recognition.

- The batch may remain in the list but unlocked (no lock icon displays). This allows you or another user to lock the batch for use and make further changes.

1.2 Starting the Capture client

Start the Capture client in one of the following ways:

- **Enter a web address in a browser.**

  For example, you might enter a URL with the following format in a browser address field:

  ```
  http://hostname:16400/dc-client
  ```

- **Begin scanning in another application**, such as a business application.

  For example, you might click a **Scan** button from a record in your business application, to scan a document and attach it to the selected business record.

  > **Note:** If prompted, sign in to Capture by entering a user ID and a password.

1.3 Navigating the Capture client

The Capture client provides a single window with three distinct work areas, or panes. You perform actions on batches, documents, and pages in these panes:

- **Batch pane**

  The batch pane in the upper left is fixed, while its other panes change, depending on your selection in the batch pane's tree. See Section 1.3.1.

  When you select a batch in the batch pane, **Batch Information** displays in the right pane to view or edit. For example, change the batch's status or priority, or include a note as a reminder or for others to view. See Section 1.3.4.

- **Document pane**

  When you select a document in the batch pane, the right pane displays the document pane, containing the batch's documents, their thumbnail images, and document options in a top toolbar. See Section 1.3.2.

■ **Metadata pane**

The lower left pane, the metadata pane, displays metadata fields for indexing documents. Note that the metadata pane displays only when indexing is configured for the selected client profile. See Section 1.3.3.

Figure 1–2   Capture Client Window Displaying Batch, Document, and Metadata Panes
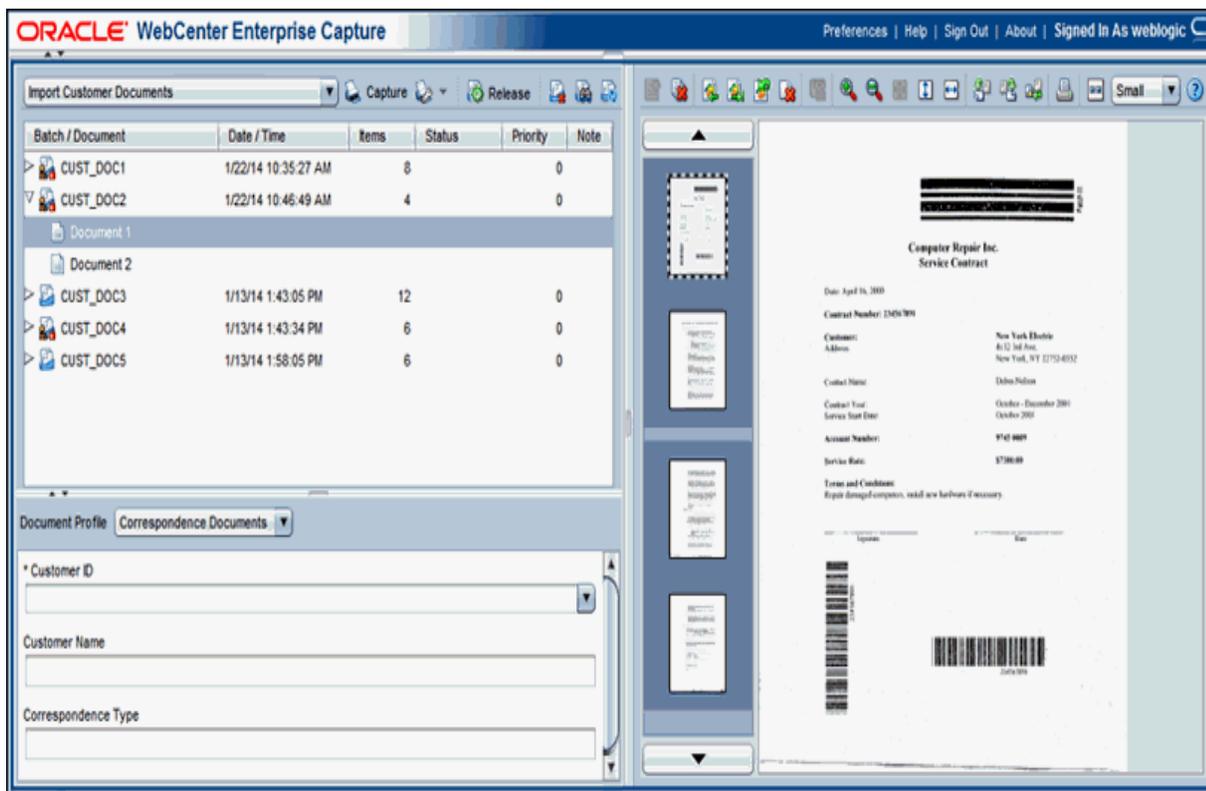
1.3.1 About the Batch pane

The batch pane always displays in the upper left pane, listing batches and their documents in a hierarchical batch list tree. Use the batch pane to select batches and documents, and to perform actions on batches by clicking batch toolbar buttons above the tree.

■ To select a batch, click its name. You can edit its batch information in the right pane. See Section 1.3.4.

Figure 1–3   Batch Selected in Batch Pane
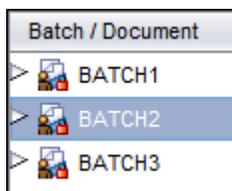
■ To select a document, expand the batch by clicking the triangle before the batch name, then select a document.

Figure 1–4   Document Selected in Batch Pane
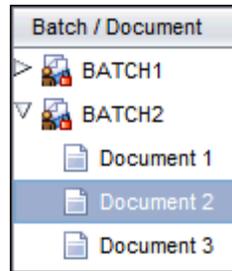
Table 1–1 describes the batch pane toolbar buttons and keyboard shortcuts.

Table 1–1   Batch Pane Buttons and Keyboard Shortcuts

Batch Pane Buttons	Button Name	Shortcut	Description
Cust Docs ▼	Client Profiles		Select a profile to apply its settings when scanning or importing batches. A client profile must always be selected when creating, updating, or releasing batches.
	Capture	F9	Begin scanning or importing documents, using the selected client profile, capture settings, and capture source.
	Capture Settings/ Capture Source	Ctrl+S (Settings) Ctrl+Alt+S (Source)	This button has two functions: ■ Click its left side (Capture Settings) to change capture settings for the selected scanner or for the import source. Settings you select are saved for the client profile. ■ Click the triangle on its right side (Capture Source) to select a scanner or the import source as the capture source.
	Release	F10	Unlock one or more selected batches, which synchronizes their data with the Capture server and automatically forwards the batch for post-processing, if configured in the batch's client profile.
	Delete Batch		Permanently remove one or more selected batches, including their documents and metadata.
	Search	F7	Specify criteria to search for batches and filter the batch list. Filtering remains (even during batch refreshes) until you select the client profile again or clear the search criteria. You can search based on batch name, creation date, status, priority, or processing state. Note that client profile settings can affect the batches displayed.
	Refresh Batch List	F5	Reload the list of batches to reflect recent batch changes. Note that filtering remains during batch refreshes.
	Select First Document	Home	Keyboard shortcut that selects the first document in the batch when a document is currently selected.
	Select Last Document	End	Keyboard shortcut that selects the last document in the batch when a document is currently selected.

Table 1–2 describes batch list icons, which indicate whether you can work on a batch.

Table 1–2   Batch List Icons

Batch List Icon	Icon Name	Description
	Locked to You	Indicates that the batch is locked to you, the user currently using the workstation.
		You can have multiple batches locked and open to you at once. Other users cannot access these batches until you release them.
	Locked to Another User	Indicates that the batch is locked by another user.
		If you attempt to expand a batch locked to another user, a message displays, indicating the user who locked it and the workstation name.
	Unlocked	Indicates that the batch is unlocked and ready for you or another user to select it to work on.
	Processing	Indicates that the batch is currently undergoing processing and cannot be accessed.
		For example, depending on client profile settings, the batch's documents might be undergoing conversion, bar code recognition, or commit processing. You can click the **Batch Refresh** button to check if the batch is still in the processing state.
	Error	Indicates that the batch contains one or more documents with errors. See Section A.1.

1.3.2 About the Document pane

Use the document pane to review and edit selected documents. This pane displays in the right pane whenever a document is selected in the batch pane. It displays details for the batch's documents, including a scrollable thumbnail view of document pages, in which:

- The selected thumbnail's page also displays as an adjacent full page view, allowing you to carefully review pages and further magnify them if needed. A dotted outline indicates the selected thumbnail.

- A light-colored bar between pages identifies the end of one document and the start of the next.

- You can drag and drop thumbnails from image documents to move pages within or between documents.

> **Note:** You cannot move pages contained in non-image documents.

Toolbar buttons along the top of the pane allow you to make changes to documents or their pages, as listed in Table 1–3. Note that the document pane must be selected to use keyboard shortcuts.

Table 1–3   Document Pane Buttons and Keyboard Shortcuts

Button	Name	Shortcut	Description
	Create New Document	Ctrl+E	Create a new document, using the current page and all pages below it, until the next document.
	Remove/Delete Documents	Ctrl+Alt+D	Depending on your selection, either: ■ Remove the selected document, adding its pages to the end of the previous document. (If the selected document is the first document in the batch, only an option to delete the document displays.) Note that removing a document also removes its metadata values. ■ Delete the selected document, including all of its pages, from the batch. See Section 3.3.2.
	Insert Pages		Scan or import new pages into the batch, inserting them before the selected page. See Section 3.4.1. ■ If scanning, prompts you to scan one page or all pages in the feeder. ■ If importing, prompts you to specify files to import.
	Append Pages	Ctrl+Alt+A	Scan or import pages to add to the batch. See Section 3.4.2. ■ If scanning, prompts you to scan one page or all pages in the feeder. ■ If importing, prompts you to specify files to import, and to add them to the end of the selected document or to create a new document.
	Replace Page		Delete the selected page and replace it with the page you scan or import. See Section 3.4.3.
	Delete Pages	Ctrl+D	Delete one or more selected pages. See Section 3.4.4.
	Database Lookup	Ctrl+L	Perform a database search for the selected metadata field. This button is active only when configured for the metadata field. Enter a search value and click the **Database Lookup** toolbar button or press Ctrl+L. If multiple matching values display in a results list, select a value.
	Zoom In	Ctrl+I	Increases the magnification of the selected page view. Click repeatedly to further zoom in.
	Zoom Out	Ctrl+O	Decreases the magnification of the selected page view. Click repeatedly to further zoom out.
	Fit to Window	Ctrl+W	Changes the page display so that the entire page fits in the window.
	Fit to Height		Changes the page display so that the entire height fits in the window.
	Fit to Width		Changes the page display so that the entire width fits in the window.
	Rotate Left		Rotates the selected page to the left 90 degrees. The page is saved as last rotated (applies to images only).
	Rotate Right	Ctrl+R	Rotates the selected page to the right 90 degrees. The page is saved as last rotated (applies to images only).
	Flip		Rotates the selected page upside down 180 degrees. The page is saved as last rotated (applies to images only).
	Print Page		Prints the selected page to the selected printer.
	View thumbnails horizontally/vertically		Switches the thumbnail display between a vertical and horizontal orientation.
Small ▼	Thumbnail size		Displays thumbnails using a small, medium, or large view.
	Help	F1	Displays help for the selected window.
	Next Document	Ctrl+Alt+N	Keyboard shortcut that selects the next document.

Table 1–3   (Cont.) Document Pane Buttons and Keyboard Shortcuts

Button	Name	Shortcut	Description
	Previous Document	Ctrl+Alt+P	Keyboard shortcut that selects the previous document.
	Next Page	Ctrl+N	Keyboard shortcut that moves the thumbnail selection to the next page.
	Previous Page	Ctrl+P	Keyboard shortcut that moves the thumbnail selection to the previous page.
	Display Document First Page	Home	Keyboard shortcut that moves the thumbnail selection to the first page of the document. This shortcut works only when the cursor focus is in the thumbnail area.
	Display Document Last Page	End	Keyboard shortcut that moves the thumbnail selection to the last page of the document. This shortcut works only when the cursor focus is in the thumbnail area.
	Select All Document Pages	Ctrl + A	Keyboard shortcut that selects all thumbnail pages in the selected document. This shortcut works only when the cursor focus is in the thumbnail area.

1.3.3 About the Metadata pane

Use the metadata pane to index documents by completing their metadata values.

- The metadata pane displays when the selected client profile includes indexing and a document is selected in either the batch or document pane.

- Values you enter in the metadata fields apply to all pages in the selected document. To ensure standard input, metadata fields may use input masks or special formatting, numeric or date fields, choice lists, or database lookups, as described in Chapter 4. An asterisk indicates a required metadata field. See Section 4.1.1.

  For example, you might enter an account number or look up a value from the database, which might auto populate related metadata fields.

- Use the **Document Profile** field to identify the set of metadata fields to complete for the selected document.

  For example, a batch of customer documents might contain correspondence and customer agreement document profiles. While indexing, you would select a *Correspondence* document profile each time you encounter a correspondence document and complete its fields, then select the *Customer Agreement* document profile each time you encounter an agreement document.

- To move between metadata fields using keyboard shortcuts, press **Tab** to move to the next metadata field, and **Shift-Tab** to move to the previous metadata field.

1.3.4 About the Batch Information pane

Whenever you select a batch in the left batch pane, batch information displays in the right pane. Use the batch information to add or edit notes about the batch, and change its status or priority. You can also view the name of the user who created the batch and when it was created and last modified. See Chapter 5.

1.4 Capture client uses

This section introduces ways that production, knowledge, and business users use Capture.

Capture users typically fall into one of the following categories:

- **Production users** launch Capture in their browser to process large volumes of batches and their documents. See Section 1.4.1 and Section 1.4.2 for scanning, and Section 1.4.4 for indexing.

- **Knowledge workers** launch Capture in their browser to scan, import, and/or index documents occasionally as part of their job. See Section 1.4.1 and Section 1.4.3.

- **Business application users** launch Capture indirectly from their business application to quickly scan and attach documents related to business application records. See Section 1.4.5.

1.4.1 Scenario 1: Scanning and indexing documents

This scenario applies to both a production user assigned to scan entire boxes of paper document folders and a user who scans document batches on an occasional basis. Regardless, the user must know the client profiles to use for different types of document batches. For example, this user might select:

- A client profile called *Separator Pages* to scan batches that have separator pages placed between documents.

- A client profile called *Simplex* or *Duplex* to scan batches that are composed of only single or double-sided documents.

- A client profile called *Prompt* that prompts the user to specify how documents are comprised.

Within the client, the user chooses a client profile configured for the type of batch to scan and begins capturing a batch. The user reviews and indexes each document, then releases the batch. See Section 2.2 for more information.

1.4.2 Scenario 2: Scanning documents only

In this case, the user's task is to scan batches of documents without indexing them. When scanning in Capture, a capture-only batch contains one document only, which may be separated into multiple documents and indexed later. For example, these batches may be separated and indexed by users who index only (Section 1.4.4) or through an automated process such as bar code recognition or intelligent data recognition.

Within the client, the user chooses a client profile configured for capture only and begins capturing a batch. The user reviews each document, then releases the batch. See Section 2.2 for more information.

1.4.3 Scenario 3: Importing document files

This case involves creating batches by importing electronic files, either multiple image files or non-image files such as Microsoft Word or PDF files.

Within the client, the user chooses a client profile configured for the type of batch to import and begins capturing a batch by selecting files to import. The user reviews and indexes each document (if configured), then releases the batch. See Section 2.3 for more information.

1.4.4 Scenario 4: Indexing documents only

In this case, the user's task is to assign metadata values to previously captured documents. For example, batches might have been scanned by production users, imported as electronic files, or imported as part of a bulk process.

Within the client, the user chooses an index-only client profile, then selects a batch to index. Typically, the batch list is filtered to display only batches that need indexing. If the documents are unorganized within the batch, all batch pages are assigned to the first document. The user creates new documents if needed. After indexing each document, the user releases the batch. See Section 4.1.1 for more information.

1.4.5 Scenario 5: Scanning or importing documents via business application

This scenario begins from a business application rather than the Capture client. After completing customer entry fields, the user needs to scan or import a related document and attach it to the selected customer record.

The user clicks a Scan or Import button from a business application record. The client window displays and Capture immediately begins scanning or prompting for import, using the settings in a preselected client profile. Once captured, the batch is displayed. Often, metadata fields are automatically populated with values entered for the business application record.

Typically, the user reviews and indexes the documents, then releases the batch. The user returns to the business application record or another web page, and the document becomes attached to the business application record. See Section 2.2.5 for details.

1.5 Setting preferences

Use preferences to select scanning settings, accessibility features, logging options, and other settings. To view and edit Capture client preferences:

1. Click the **Preferences** link in the upper right area of the client window.

Figure 1–5 Preferences Window
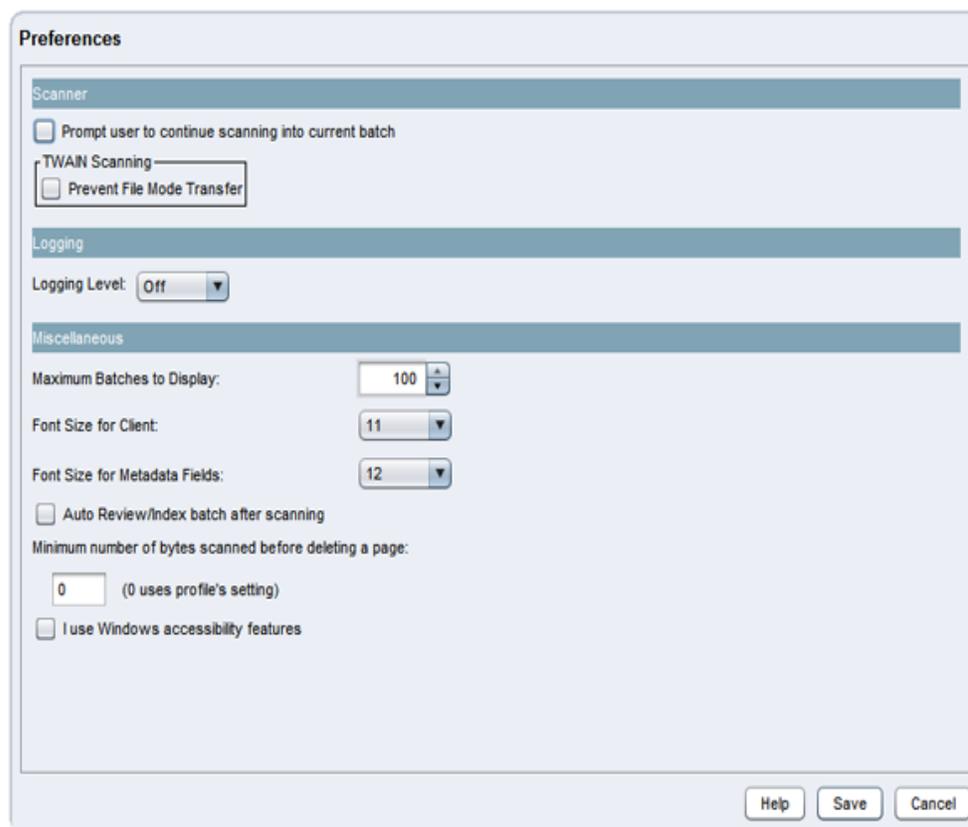
2. Set other preferences as needed.

- For accessibility-related preferences, see Client Accessibility Features.

- For scanning-related preferences, see Section 2.2.8.

- For logging preferences, see Section A.1.1.

- For miscellaneous preferences, see Section 5.2.4.

3. Click **Save**.

1.5.1 Resizing the window panes

You can resize the left and right panes as well as the batch and metadata panes. To resize, move the cursor over the pane separation. When the cursor changes to a double-headed arrow, click and drag to resize.

After resizing, the new dimensions are automatically saved and displayed the next time you open the client.

2

Scanning and importing documents

In the Capture client, document capture occurs in one of two ways: you scan paper documents using a TWAIN-compliant device, or you import electronic files. This chapter provides details on how to scan and import documents, based on client profile settings.

This chapter covers the following main topics:

- Understanding scanning
- Scanning documents
- Importing documents

2.1 Understanding scanning

This section covers the following topics:

- How Capture handles image and non-image documents
- How scanning works
- How documents are created during scanning
- How importing works

2.1.1 How Capture handles image and non-image documents

Capture accommodates image and non-image documents:

- When you *scan* documents, Capture creates multiple page image documents. In the document pane, you can view and edit each page individually (for example, move and rotate pages), and also verify where one document ends, and the next begins.

- When you *import* non-image documents, Capture uses the client profile setting, taking one of the following paths:

  – Converts the file to a multiple page image document, as if you had scanned it. In the document pane, a thumbnail is displayed for each image, and you can select and edit individual pages (for example, move and rotate pages).

    Note: When non-image documents are converted to image files by the document conversion processor, the client shows the batch items count including the number of original set of batch items (non-image items) and when the user attempts to review the batch, only the batch items associated with the documents (only the number of converted image files) are displayed.

–   Imports the file and retains it in its native format. In the document pane, a thumbnail is displayed for each non-image page, up to a maximum number set in the client profile. You can index the document, but cannot edit its pages.

–   Prevents the file from being imported, and displays an error message.

2.1.2 How scanning works

Suppose you are handed one or more large boxes and instructed to scan their contents. You discover that each folder contains multiple customer documents, but they are assembled in many different ways. Some contain one page documents, some double-sided documents, and others contain related documents of varying numbers of pages. How do you scan them in batches so that it is clear where one document ends and the next one begins?

To know how to scan documents, you must know several key items:

■   How the documents are structured within each batch for scanning (see Section 2.1.3)

■   Which client profile to use, so that it can be matched to the structure

For production scanning, you are likely to use an ADF (automatic document feeder), a scanner or multifunction device feature that automatically feeds in pages one at a time, allowing you to scan multiple-page documents without manually replacing each page.

2.1.3 How documents are created during scanning

When scanning, the selected client profile determines how documents are created and separated within a batch. Document separation and creation happen in one of these ways:

■   **Capture prompts you to select a document creation option** when you start scanning.

You select simplex (one-sided), duplex (double-sided), or a variable number of pages, which is typically for use with separator pages. For more information about prompted scanning, see Section 2.2.6.

■   **Capture automatically creates documents** based on the selected client profile's settings.

For example, when you scan with a client profile configured for duplex scanning, Capture automatically creates a new document after scanning both sides of a page. Typically, the Capture workspace manager specifies how each client profile you use automatically creates documents.

For more information about scanning with separator sheets, see Section 2.2.7.

After a batch's documents have been created, you can adjust them as needed in the document pane. For example, you can create new documents (Section 3.3.1) and remove document separation (Section 3.3.2). You can also drag and drop pages between documents as needed.

2.1.4 How importing works

You can import image documents, such as multiple page TIFF files, and non-image documents, such as Microsoft Word files, if allowed by the client profile. See Section 2.1.1. Instead of selecting a scanner source, select **Import Source**.

Each time you import, specify how to create documents in the batch if multiple files are selected:

- Create one document for all import files

- Create one document per import file

> **Note:** Multiple non-image files cannot be imported into one document. If you select multiple non-image files for import and specify to create one document for all import files, the Capture client displays an error message indicating that the selection is invalid.

After specifying a document creation option, select files to import. You can optionally rotate images upon import and delete source files after import.

2.2 Scanning documents

This section covers the following topics:

- Preparing documents for scanning

- Selecting a scanner to use for Capture scanning

- Selecting scanner settings

- Scanning documents

- Scanning or importing from a business application

- Scanning using separator pages

- Creating documents if prompted when scanning

- Setting scanning preferences

2.2.1 Preparing documents for scanning

To prepare documents for scanning:

1. Make sure the scanner is turned on.

   For some scanners, you must ensure that the scanner is powered on before turning on the computer.

2. Determine the client profile to use.

   If needed, ask your Capture workspace manager which client profile to use for batches to scan, based on their structure. You should know how the client profile creates documents within batches, as described in Section 2.1.2.

3. Organize documents into batches for scanning, inserting separator sheets between documents if needed.

   For example, organize single-sided documents into a batch for use with a simplex client profile.

2.2.2 Selecting a scanner to use for Capture scanning

To scan, you must have a TWAIN-compliant scanner available to your system.

1. Click the right side of the **Capture Settings/Source** button in the batch pane (Ctrl+Alt+S).

When you click the triangle, one or more capture sources are listed. A check mark displays next to the selected capture source, which may be a scanner or *Import Source*.

2. If you have multiple scanner sources listed, select one to use. To import rather than scan, select **Import Source**.

2.2.3 Selecting scanner settings

Follow these steps to select scanner settings, which are specific to the selected scanner. Because capture settings are saved with the client profile, you can configure different scanner settings for each client profile. Note that you can set additional scanner options under Preferences, as described in Section 2.2.8.

1. If needed, select the scanner source to which to apply settings.

   Press **Ctrl+Alt+S** and choose a scanner, as described in Section 2.2.2.

2. Click the left side of the **Capture Settings/Source** button in the batch pane (Ctrl+S).

   Settings relating to the selected scanner display.

Figure 2–1   Example Scanner Settings
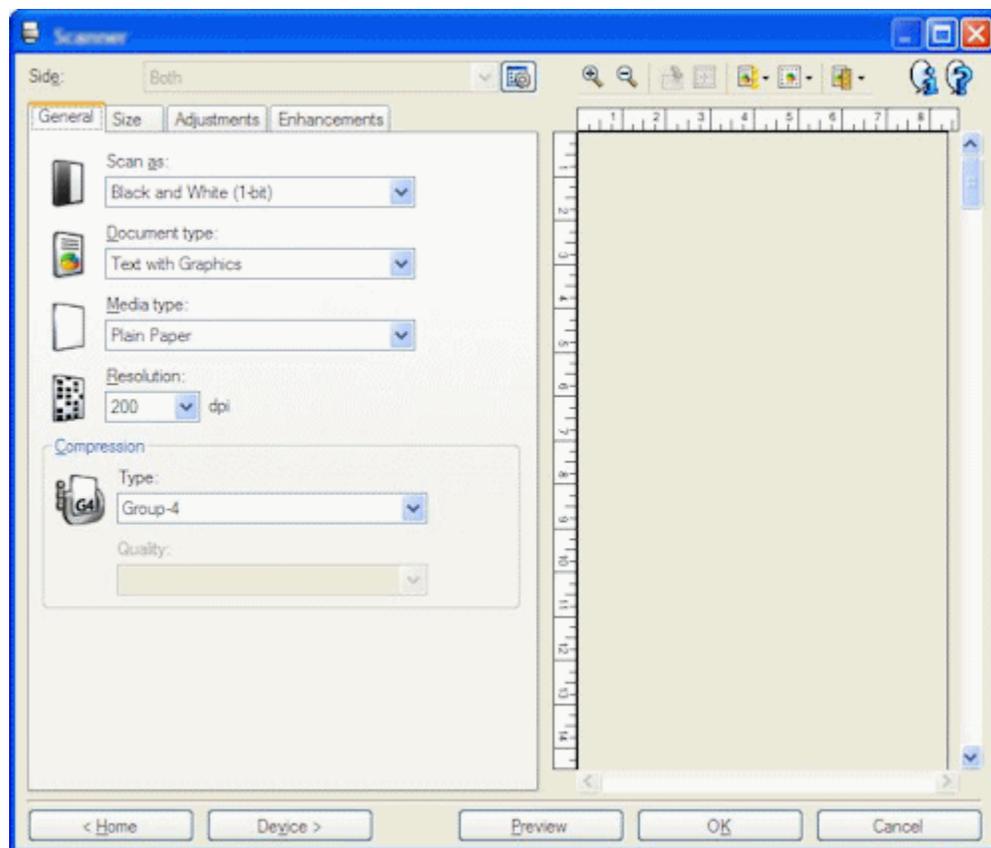
3. Select scanner settings.

   See the documentation provided with the scanner for more information. Note that settings relating to color and resolution may be disabled, depending on client profile settings.

2.2.4 Scanning documents

Follow these steps to scan a batch. These instructions assume that you have prepared the documents for scanning as described in Section 2.2.1.

1. Place the documents on the feeder tray of the scanner.

2. In the batch pane of the Capture client window, select a client profile.

3. If needed, select a different capture source by clicking the right side of the **Capture Settings/Source** button and choosing an available scanner (Section 2.2.2).

4. Click the **Capture** button. If prompted, select a document creation option (Section 2.2.6).

    Capture begins scanning. If you encounter scanning problems, first check that the cables are properly connected and the scanner is powered on.

    The batch is created in the batch pane list and locked to you. It displays in one of two ways:

    ■   The batch is selected in the batch pane and its batch information displays in the right pane.

    ■   The batch is open in the batch pane with its first document selected, while options for editing and indexing documents display in the right pane and lower left pane, respectively. To set this display as the default setting, click the **Preferences** link in the upper right corner of the window and select the **Auto Review/Index batch after scanning** field.

2.2.5 Scanning or importing from a business application

For background information, see Section 1.4.5. Note that when capturing from a business application, the client profile is preselected and cannot be changed.

1. In a business application, click the button to capture documents. For example, click a **Scan** or **Import** button on a business record screen.

    The Capture client window displays. Depending on client profile settings, Capture may immediately begin scanning using the specified scanner, or you may be prompted to select files to import or begin scanning.

2. If importing, select one or more files to import.

    After the scanned or imported batch is created, it displays in one of two ways:

    ■   The batch is selected in the batch pane and its batch information displays in the right pane.

    ■   The batch is open in the batch pane with its first document selected, while options for editing and indexing documents display in the right pane and lower left pane, respectively. To set this display as the default setting, click the **Preferences** link in the upper right corner of the window and select the **Auto Review/Index batch after scanning** field.

3. Review, edit, and index documents as needed. Metadata fields may already contain values.

4. If needed, click the **Capture** button in the batch pane to capture additional batches.

    Typically, only batches from your current Capture client session are listed in the batch pane.

5. Release batches by selecting one or more batches in the batch pane (holding down the Ctrl key), and clicking the **Release** button.

Depending on client settings, releasing batches may automatically sign you out of the Capture client and return you to the line of business web application. If not, click the **Sign out** link to exit Capture.

2.2.6 Creating documents if prompted when scanning

Depending on client profile settings, the Document Creation Options window may display after you click **Capture** to begin scanning, prompting you to specify how to create documents.

Figure 2–2   Selecting a Document Creation Option When Prompted
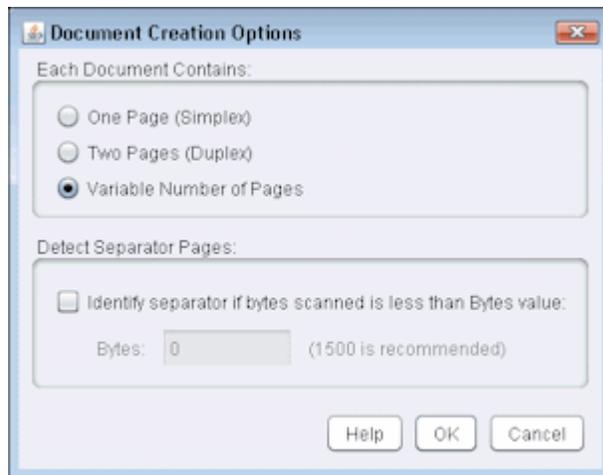
1. Specify the contents of each document in the batch. You can choose:

   - **One Page** (Simplex): Select this option if all documents are single-sided.

   - **Two Pages** (Duplex): Select this option if all documents are double-sided.

   - **Variable Number of Pages**: Select this option if you are using separator sheets to define documents (as described in Section 2.2.7) or if documents are neither all single-sided or all double-sided documents.

2. Click **OK**.

   Capture scans and creates a batch based on the document creation option you chose.

   If you chose **Variable Number of Pages** but did not insert separator sheets, Capture created a single document. Use the **Create New Document** button in the document pane to create document separations in the batch (Section 3.3.1).

2.2.7 Scanning using separator pages

Separator pages provide a useful way of identifying where one document ends and the next one starts in a batch. To scan batches with documents divided by separator pages:

1. Before scanning, insert blank sheets between documents.

2. In the batch pane, select a client profile configured for separator sheet scanning.

   The profile must be set to either prompt you to choose a document creation option or to create documents with a variable number of pages. If needed, ask your Capture workspace manager about client profile use.

3. Click the **Capture** button with a scanner source selected.

   ■ If the Document Creation Options window displays, select **Variable Number of Pages**. Select the **Enable Separator Sheets** field and enter a number in the **Bytes** field below it. The **Bytes** field defines the difference between a blank separator page and a page with a small amount of text. A blank page is detected if its file size (in bytes) is below a threshold value. The recommended number is 1500, which means Capture considers each page on which it finds fewer than 1500 bytes to be a blank page, and deletes it from the batch. If you encounter problems with this setting, increase or decrease the number of bytes as required.

   ■ If no prompt displays, Capture looks for blank pages while scanning and upon detecting one, creates a new document and discards the blank page. A blank page is detected if its file size (in bytes) is below a separator sheet threshold value configured in the client profile.

4. View the new batch's documents. The blank separator sheets were discarded when the batch was created.

2.2.8 Setting scanning preferences

In addition to scanner settings you configure using the **Capture Settings/Source** button (see Section 2.2.3), you can set additional scanning options under Preferences settings:

1. Click the **Preferences** link in the upper right area of the client window. See Section 1.5.

2. Optionally select the **Prompt user to continue scanning into current batch** field.

   When selected, a message displays after Capture completes the initial scan that asks if you want to continue scanning into the current batch. This option allows you to pause to insert more paper into the automatic document feeder after it runs out of paper, then scan the pages into the current batch. It is also useful when scanning pages one at a time into a batch.

3. If needed, select the **Prevent File Mode Transfer** field.

   File mode transfer, which instructs the TWAIN-compliant driver to write image files to disk rather than transfer them by memory buffer, is the preferred approach, as it significantly increases scanning performance. However, file transfer mode can cause scanning issues with certain scanner drivers. If needed, select this field to turn off file transfer mode.

4. Optionally select the **Auto Review/Index batch after scanning** field to view a batch in the document pane immediately after completing scanning the batch.

5. In the **Minimum number of bytes scanned before deleting a page** field, optionally specify how blank pages should be detected and deleted.

   In this field, set the number of bytes below which Capture considers a page blank and deletes it. If this value is 0, Capture uses the value configured in the client profile for blank page detection.

6. Click **Save**.

2.3 Importing documents

This section covers the following topics:

2.3.1 Specifying importing rather than scanning

To specify importing as the capture source:

1. In the batch pane, click the right side of the **Capture Settings/Source** button.

2. Select **Import Source**.

3. Click the **Capture** button to begin importing files.

2.3.2 Selecting import settings

Follow these steps to select default import settings to display each time you import files. Import settings are saved with the selected client profile.

1. In the batch pane, click the left side of the **Capture Settings/Source** button.

   The Import Settings window displays. (If scanner settings display instead, click the right side of the **Capture Settings/Source** button and select **Import Source**.)

Figure 2–3   Selecting Import Settings
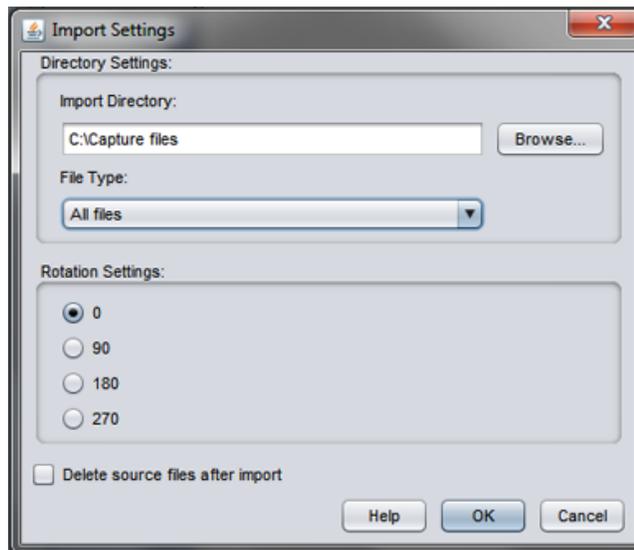
2. Click **Browse** next to the **Import Directory** field and specify a location from which to select files to import.

3. To import files of a specific type, select the type in the **File Type** field. For example, select **TIFF** to list TIFF files only. To display all files in the directory regardless of type, select **All files**.

4. In the **Rotation Settings** field, select a rotation degree (0, 90, 180, or 270). Capture rotates images during import as specified.

5. Select the **Delete source files after import** field to delete images from the import directory after they are successfully imported.

6. Click **OK** to save the settings.

2.3.3 Importing files into a batch

Follow these steps to import image files (such as multi-page TIFFs) or non-image files (such as Microsoft Word or PDF files) into Capture. When importing non-image files, the selected client profile determines whether Capture converts the files to image format, imports them in their native format, or prevents them from being imported.

1. In the batch pane, select a client profile.

   This profile contains the settings used to import and create Capture batches. If needed, ask a Capture workspace manager which one to use.

2. If needed, click the right side of the **Capture Settings/Source** button and select **Import Source** to specify importing rather than scanning.

3. Click the **Capture** button.

4. In the Import window, specify how to create documents (one document from multiple files or one document per file), and click **OK**.

Figure 2–4   Selecting an Import Document Creation Option
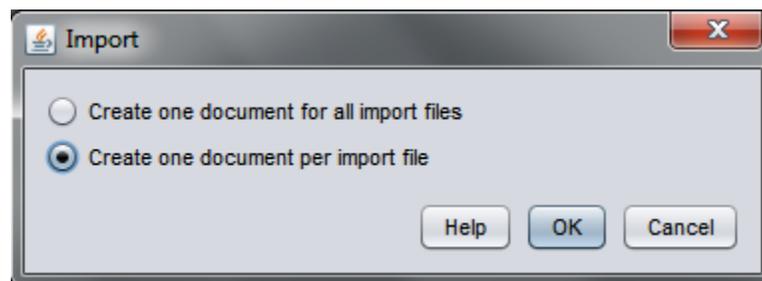
5. In the Select files to import window, select one or more files to import, holding down the Ctrl key to select multiple files.

   The selected files are displayed in the **File Name** field.

6. Click **OK**.

   A new batch containing the imported files is selected in the batch pane.

3

Reviewing and editing documents

Whether you are working with documents at a production or small batch level, most likely you will need to review and adjust them in the document pane. This chapter describes how to review and update documents before releasing them for indexing, further processing, or writing to a content repository.

This chapter covers the following main topics:

- Reviewing documents and pages
- Editing documents and pages
- Creating and removing documents
- Adding, replacing, and deleting pages

3.1 Reviewing documents and pages

This section covers the following topics:

- Automatically reviewing and indexing documents after capturing them
- Zooming in and out of the selected page
- Resizing or repositioning the thumbnail display
- Printing a page

3.1.1 Automatically reviewing and indexing documents after capturing them

After you scan or import a batch, its properties are displayed by default in the right pane. You can set a preference so that the document pane is automatically displayed instead, with the first page in the first document of the batch selected.

1. Click the **Preferences** link in the upper right side of the client window.
2. Select the **Auto Review/Index Batch after scanning** field.

3.1.2 Zooming in and out of the selected page

Use the **Zoom In**, **Zoom Out**, **Fit to Height**, **Fit to Width**, and **Fit to Window** buttons to enlarge or reduce the image in the viewer to examine image quality. These settings are not saved with the batch. When you open a batch, its images are always displayed in the Fit to Window size.

- In the document pane, click the **Zoom In** button to enlarge the image. Click the **Zoom Out** button to reduce the image.

- Another way to zoom is to click and drag a rectangular area on the image using the left mouse button (rubberband zooming).

- Click the **Fit to Height** button to change the page display so that the entire height fits in the window.

- Click the **Fit to Width** button to change the page display so that the entire width fits in the window.

- At any point, click the **Fit to Window** button to display the entire image in the viewer.

3.1.3 Resizing or repositioning the thumbnail display

You can display the scrollable thumbnail bar either vertically (default) or horizontally. To resize the panes, click and drag the pane separator (Section 1.5.1).

After you resize or reposition the thumbnail display, Capture saves the new settings for subsequent sessions.

1. In the document pane, click the **Thumbnail Size** button in the toolbar.

2. Select **Small**, **Medium**, or **Large**, and the thumbnail size changes to reflect your new selection.

3. Click the **View thumbnails horizontally/vertically** button to switch the display to horizontal or vertical thumbnails, if desired.

3.1.4 Printing a page

To print a scanned or imported page:

1. In the document pane, select the page to be printed by selecting its thumbnail.

2. Click the **Print Page** button. In the Print window, select the printer and configure settings as needed. The page is printed.

3.2 Editing documents and pages

This section covers the following topics:

- Increasing an image's quality

- Moving a page to another document

- Rotating or flipping a page

3.2.1 Increasing an image's quality

Many scanners have capabilities to improve black/white image quality using features such as noise removal and dynamic thresholding. Review your scanner's documentation to optimize image quality when scanning in black/white.

Follow these steps to increase image quality:

1. Make sure the scanner is operating optimally as described in its documentation (for example, ensure that the glass is clean).

2. In the **Batch** pane, click the left side of the **Capture Settings/Source** button and adjust the available scanner settings (for example, adjust brightness and contrast for scanning). Note that a client profile may restrict you from changing some scanner settings such as DPI resolution and color.

3. If needed, contact your Capture workspace manager to request that scanner settings such as DPI or brightness and contrast be adjusted for the client profile.

3.2.2 Moving a page to another document

To move a page within a document or to another document, drag and drop the page's thumbnail to the new location.

Note: If you drag the only remaining page in a document to another document, the document is automatically removed.

3.2.3 Rotating or flipping a page

To rotate or flip pages:

1. In the **Document** pane, select the thumbnails of one or more pages to rotate or flip.

   Hold down the Ctrl key to select multiple thumbnails. If you scanned an entire batch upside down, press Ctrl+A to select all pages before selecting the Flip option described in the next step.

2. Click one of the rotate buttons. Rotating or flipping a page saves it that way within the batch.

   - Click **Rotate Left** to rotate images 90 degrees counterclockwise.
   - Click **Rotate Right** to rotate images 90 degrees clockwise.
   - Click **Flip** to rotate images by 180 degrees.

3.3 Creating and removing documents

This section covers the following topics:

- Splitting a document and creating a new document
- Removing a document separation
- Deleting a document and its pages

3.3.1 Splitting a document and creating a new document

For example, suppose you realize that certain pages belong to another customer and need to be in a separate document.

1. Select the page at which to create a new document.

2. From the document pane toolbar, click the **Create New Document** button.

   A new document that starts with the current page and includes all pages below it until the next document is created.

3.3.2 Removing a document separation

Follow these steps to remove a document separation, which appends the selected document's pages to the previous document. To delete a document and its pages instead, see Section 3.3.3.

1. Select the document to merge with its previous document.

   If you select the first document in a batch, you are prompted to delete the document because it has no previous document.

2. Click the **Remove/Delete Documents** button.

Figure 3–1   Deleting a Document or Removing a Document Separation
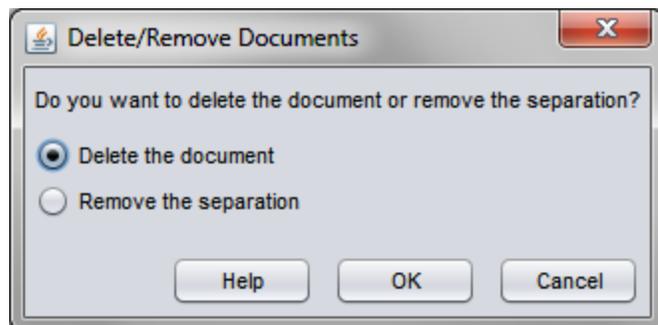
3. When prompted, select the option to remove the separation and click **OK**. The document is merged with its previous document.

3.3.3 Deleting a document and its pages

Follow these steps to delete a document and its pages.

1. Select the document to delete.

   You can select the document in the batch pane or select one of its thumbnails in the document pane.

2. Click the **Remove/Delete Documents** button in the document pane's toolbar.

3. When prompted, select the option to delete the document and click **OK**.

3.4 Adding, replacing, and deleting pages

This section covers the following topics:

- Inserting pages before a selected page
- Appending pages to a document
- Replacing a page
- Deleting a page

Note that you can edit individual pages in image documents only. When editing non-image documents, toolbar options for editing individual pages are disabled.

3.4.1 Inserting pages before a selected page

You can add to an image document by scanning pages or importing files. To insert:

1. If needed, press **Ctrl+Alt+S** and set a capture source (Section 2.2.2). If scanning, place pages to insert in the scanner.

2. In the document pane, select the thumbnail page before which to insert pages.

3. From the document pane's toolbar, click the **Insert Pages** button. If importing, select one or more files to insert.

   The pages or files are inserted before the selected thumbnail's page.

3.4.2 Appending pages to a document

You can append to a document by scanning pages or importing files. Note that you can append a document to a batch that contains non-image items, but you cannot append pages to a non-image document. To append:

1. If needed, press **Ctrl+Alt+S** and set a capture source (Section 2.2.2). If scanning, place pages to append in the scanner.

2. In the batch or document pane, select the document to append to.

3. From the document pane's toolbar, click the **Append Pages** button.

4. In the Append Pages window, select an append option and click **OK**.

Figure 3–2   Appending Pages or Creating a New Document
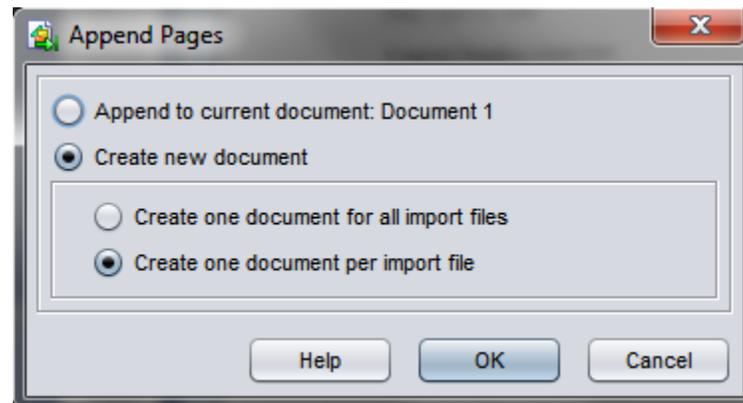
You can either:

- Append the scanned pages or imported file to the end of the selected document.

- Create a new document. If importing, specify whether to create one document for all import files or a document for each file, then select files to import when prompted.

Based on your selections, the pages or files are appended or added in one or more new documents.

3.4.3 Replacing a page

You might want to replace a page in an image document if a problem occurred while scanning and only half of the page was scanned. To replace a page:

1. If needed, press **Ctrl+Alt+S** and set a capture source (Section 2.2.2). If scanning, place the replacement page in the scanner.

2. In the document pane, select the thumbnail of the page to replace.

3. From the document pane's toolbar, click the **Replace Page** button.

4. Click **Yes** to confirm that you are deleting the selected page and replacing it with the page(s) you are scanning or importing. If importing, select one or more files to replace the selected page.

3.4.4 Deleting a page

To delete one or more pages in an image document:

1. In the **Document** pane, select the thumbnails of pages to delete. Hold down the Ctrl key to select multiple thumbnails.

2. Click the **Delete Pages** button and confirm the deletion.

4

Indexing documents

Metadata values allow you to classify documents, particularly for retrieving them later from a content repository by searching for one or more of their metadata values. Whether you are performing production indexing or indexing as part of scanning or importing, the same methods apply. This chapter describes how you select a document profile to match the type of document to index and the various ways you may complete metadata fields, depending on client profile settings.

This chapter covers the following main topics:

- Understanding document indexing
- Indexing documents

4.1 Understanding document indexing

This section covers the following topics:

- Understanding indexing
- Understanding database lookups
- Using input masks in metadata fields
- Using display formatting in metadata fields
- Understanding choice list metadata fields

4.1.1 Understanding indexing

Follow these guidelines for indexing in the Capture client:

- If the selected client profile is configured for indexing, metadata fields display in the lower left pane when you select a document in the batch pane.
- All pages of a document share the same metadata values, so indexing one page of a document indexes all its pages. In the document pane, documents in a batch are visually divided by a light-colored bar. In the batch pane, documents are listed under their batch.
- An asterisk (*) displays to the left of a metadata field name if it is required. A document is fully indexed when all required metadata fields contain a value. Documents do not need to be fully indexed to release the batch, but an error may occur in a later batch processing step. See Section A.1.
- To ensure standard input, metadata fields may use input masks or input formatting, choice lists, or database lookups, as described later in this section.

■ To improve readability, you can adjust the font size of the metadata fields in the Preferences window. See Section 2.2.8.

4.1.2 Understanding database lookups

A database lookup contains connection and search information to connect to a database and search for matching records associated with a metadata field value. Depending on the configuration, a list of search results may display, and database values may automatically populate other metadata fields when one database record is found. For example, a database lookup might be defined on a customer name field that then populates customer metadata fields such as customer Id and address. See Section 4.2.2.

4.1.3 Using input masks in metadata fields

If a metadata field uses an input mask, or filter, it controls what you can enter into the metadata field. For example, a mask might allow you to type numbers but not alphabetic characters into the field, or might limit your entry to four characters. If you type a character that does not conform to the mask, the system beeps and the application does not accept it. For example, a metadata field named *Invoice Number* might use an input mask that restricts entries to a 7-digit number.

4.1.4 Using display formatting in metadata fields

A metadata field may use a display format to ensure that entries display in a certain format. When you move to another metadata field, Capture changes the data display, if needed, to match the display format. For example, an entry in a date field might be changed to display a standard date format. Note that the metadata value Capture saves is not changed.

4.1.5 Understanding choice list metadata fields

A choice list field provides a list of values from which to choose. Click the triangle next to the field to display and select from the choice list. (Depending on client profile settings, a choice list may allow you to enter rather than select a value.)

Figure 4–1   Selecting From a Choice List
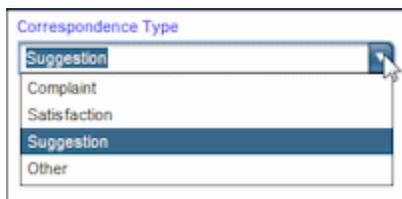
Choice list fields can be dependent, where a selection in one choice list field (the parent) determines the choices displayed in a dependent choice list field (the child).

For example, in Figure 4–2, selecting *Household* in the **Products** parent field displays household-related choices in the *Subproducts* child field.

Figure 4–2   Selecting From a Dependent Choice List
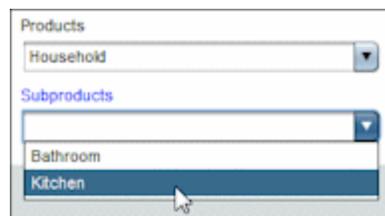
4.2 Indexing documents

This section covers the following topics:

- Indexing a document
- Indexing by looking up values from a database

4.2.1 Indexing a document

To index a document:

1. Select a document to index.

    Either select the document in the batch pane or select any of its thumbnail pages in the document pane. The metadata pane displays in the lower left pane. Some metadata fields may already contain autopopulated values.

2. In the **Document Profile** field, select a document profile that matches the type of document to index.

    For example, if indexing a customer order document, you might select a document profile with Customer Number, Customer Name, and Order metadata fields.

    > **Note:**   When changing the selected document profile, a message displays indicating that any values in fields not in the new profile will be discarded. Click **Yes** to continue.

3. Complete the required metadata fields. See Section 4.1. For indexing keyboard shortcuts, see Table 1–3.

4. Repeat steps 1 through 3 to index each document in a batch.

4.2.2 Indexing by looking up values from a database

To perform a database lookup:

1. In the metadata pane, place the cursor in a metadata field for which a database lookup has been configured.

    The Database Lookup button is active when you can perform a database search on the selected metadata field.

2. Enter the value to match. (Numeric fields often require exact values.)

    In certain cases, you may be able to enter only the first few characters of the value to match, if allowed by the client profile. For example, you might enter New in a metadata field called *Company* to search for records whose Company field name starts with *New*. However, displaying lookup results can take a long time when you enter partial values with many records to return.

3. Click the **Database Lookup** button.

   The Database Lookup Results window is displayed if multiple records were found or if the Capture workspace manager chose to display it. Otherwise, values automatically fill one or more fields without displaying a list of results.

Figure 4–3   Selecting From Database Lookup Results
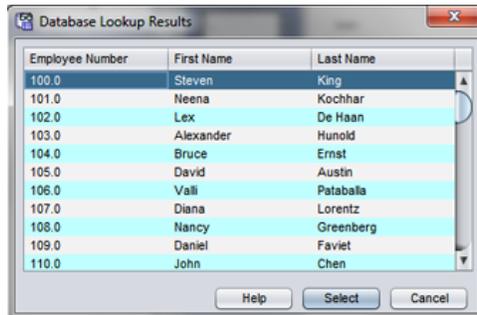
4. If lookup results were displayed, select a matching record and click **Select**. (You can also double-click a record to select it.)

   Values from the database record are populated in the metadata fields.

5

Working with batches

A batch is a collection of scanned images or electronic document files (such as PDF or Microsoft Office files) that can be organized into logical documents and stored in a repository. Pages are scanned into batches where they can then be organized into documents, indexed and released. After batches of documents are scanned or imported, they are ready for review, indexing (if specified), editing, and release. This chapter describes how to use batches: how to view, filter, and find them, lock them to work on or release them, change their properties, or edit them.

This chapter covers the following main topics:

- Understanding batches

- Sorting, filtering, and searching for batches

- Editing batches

- Changing batch information

- Releasing batches

5.1 Understanding batches

This section covers the following topics:

- How batches are named

- Understanding what happens when locking or releasing a batch

5.1.1 How batches are named

When batches are created, they are automatically named using the client profile's prefix (for example, SCAN or IMPORT), followed by an internal sequence number.

5.1.2 Understanding what happens when locking or releasing a batch

- *Batches are automatically locked* to you when you create them by scanning or importing, or when you open (expand) them, and remain so until you release them. This allows you to work on batches without another user attempting to access them. You can have many batches locked to your workstation.

- *When you release batches*, Capture sends their documents and metadata to the Capture server and unlocks them. During batch release, a progress bar moves to the right on the batch name to indicate release progress. You can select and work on other batches while the batch release continues in the background.

- *After release*, the next action performed on a batch depends on its client profile settings.

  - Batches may move to a post-processing step, such as bar code recognition, document conversion, or committing to a content repository.

  - Batches may become unlocked, allowing other users to lock and edit them. For example, after scan operators create, review, and edit batches, they might release them to index operators who select, index, and release them for post-processing.

5.2 Sorting, filtering, and searching for batches

This section covers the following topics:

- Understanding which batches are listed in the batch pane
- Searching for batches or filtering the list
- Sorting the batch list
- Limiting the batch list

5.2.1 Understanding which batches are listed in the batch pane

The following guidelines describe which batches display in the batch pane:

- **Batches locked to you are always listed**, unless you have set a limit on the maximum number to display under Preferences (see Section 5.2.4).

  Batches locked to you display the following icon:

- **Whether you see batches that are unlocked or locked to other users** depends on settings in the selected client profile. For example, the batch list may be limited to batches with a certain prefix, in a certain state (such as error or processing), or with a selected status or priority. (Note that you cannot open batches locked to another user or process.)

- **You can filter the batch list displayed** using search options. A filter remains during refreshes until you remove it. For example, you might filter the batch list to display a limited set of batches, such as high priority batches or older batches only, or search for batches containing one or more documents that encountered an error.

5.2.2 Searching for batches or filtering the list

You can search for batches by name, date, status, priority, and state. Note that the filtered list always includes batches locked to you in addition to the search results.

To search for batches:

1. In the batch pane, click the **Search** button.

2. In the Batch Search Criteria window, specify how to search for batches using the criteria listed in Table 5–1.

   You can specify multiple search options. Keep in mind that all specified search fields must match for a batch to be found, although only one value *within* a search field needs to match. For example, if you select *Urgent* in the **Status** field and *8*, *9*, and *10* in the **Priority** field, batches with an Urgent status AND a priority of 8, 9

OR 10 are found. On the other hand, batches with an Urgent status but a priority of 0, or batches with no status and a priority of 8, 9, or 10, are not found.

*Figure 5–1   Searching or Filtering Batches for Display*
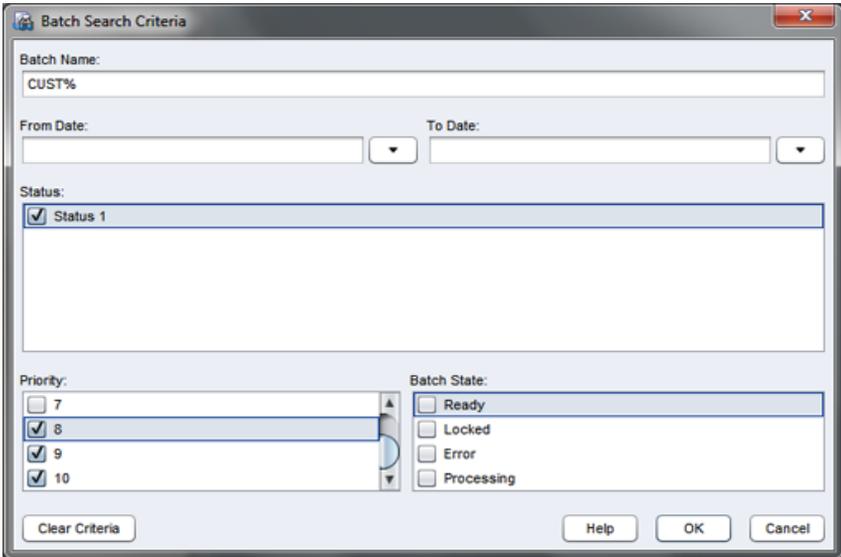
Table 5–1   Batch Search Criteria

Search Criteria	Description
Batch Name	Enter a batch name to search for. You can specify a partial name followed by **%** to match one or more characters. For example, entering `Batch%` would match batches named *Batch15* and *Batches214*.
From Date/To Date	Search for batches created within a date range by clicking the calendar button adjacent to the date field and selecting a from date and an end date.
Status	Search for batches by their assigned status by selecting one or more statuses. Batches assigned any selected status will match.
Priority	Search for batches by their assigned priority by selecting one or more priorities. Batches assigned any selected priorities will match.
Batch State	Search for batches by their system assigned state by selecting one or more states. Batches assigned any selected state will match. Available batch states include: ■ **Ready:** Batches are not locked and no errors have been encountered ■ **Locked:** Batches are locked by any user ■ **Error:** An error has been encountered in one or more documents in the batch ■ **Processing:** Batches are currently being processed by a Capture processor or processor job

3. Click **OK**.

The filtered search results display in the batch pane. Remember that batches locked to you always display in the batch pane, regardless of batch filter settings, and that batch filtering remains when you refresh the batch list until removed.

To remove a search filter:

1. In the batch pane, click the **Search** button.

2. In the Batch Search Criteria window, click **Clear Criteria**, and then click **OK**.

   The batch pane no longer filters the list by search criteria.

5.2.3 Sorting the batch list

You can sort the batch list to display batches to work on first. For example, you might sort by priority to address batches assigned a high priority first.

To sort the batch list:

1. In the batch pane, click the column heading by which to sort. For example, click the **Priority** heading to sort by priority. The column is sorted and a triangle displays next to the column heading, indicating ascending or descending (inverted triangle) order.

2. Click the heading again if needed to change the sort order.

   Note that clicking the heading repeatedly switches between ascending order, descending order, and the default sort order.

   To sort by more than one column, hold down the Shift key and click another column.

5.2.4 Limiting the batch list

To limit the number of batches listed in the batch pane:

1. Select **Preferences** in the upper right corner of the window.

2. In the **Maximum batches to display** field, set the maximum number of batches to list in the batch pane.

   Limiting the list can increase performance. The default is 100.

3. Click **Save**.

   To see the new batch list setting used, refresh the batch list or select a client profile.

5.3 Editing batches

This section covers the following topics:

- Editing an unlocked batch
- Deleting a batch

5.3.1 Editing an unlocked batch

As described in Section 1.3.1, you can edit batches that are either unlocked or locked to you. You cannot edit batches locked to another user.

To edit an unlocked batch, select it in the batch pane, then click its triangle to lock it for your use. You can now edit its batch information or select and edit one of its documents.

5.3.2 Deleting a batch

You can delete batches that are either unlocked or locked to you. Deleting a batch permanently removes all documents in the batch.

1. In the batch pane, select a batch. Hold down the Ctrl key to select multiple batches.

2. Click the **Delete Batch** button. Click **Yes** to confirm the deletion.

5.4 Changing batch information

This section covers the following topics:

- Setting or changing a batch's priority
- Setting or changing a batch's status
- Adding, editing, and deleting batch notes

5.4.1 Setting or changing a batch's priority

You can assign a priority number to a batch. The priority ranges from 0 to 10, where 10 is the highest. A batch may have been assigned a default priority by the client profile, but you can change it.

1. In the batch pane, select a batch.

    Batch information is displayed in the right pane. The **Priority**, **Status**, and **Batch Notes** fields are editable if the batch is locked to you. (If the batch is unlocked, lock it by clicking its triangle so the locked batch icon displays and the **Priority** field becomes editable.)

2. In the **Priority** field, select a new priority number from 0 to 10.

3. Click **Apply**. The priority value displays in the batch pane list.

5.4.2 Setting or changing a batch's status

You can assign a status to a batch from the list of available statuses. A batch may have been assigned a default status by the client profile, but you can change it.

1. In the batch pane, select a batch.

    Batch information is displayed in the right pane. The **Priority**, **Status**, and **Batch Notes** fields are editable if the batch is locked to you. (If the batch is unlocked, lock it by clicking its triangle so the locked batch icon displays and the **Status** field becomes editable.)

2. In the **Status** field, select a new status.

    > **Note:** Contact your Capture workspace manager to add batch statuses.

3. Click **Apply**. The new status displays in the batch pane list.

5.4.3 Adding, editing, and deleting batch notes

You can attach a note to a batch, as a reminder or to alert other Capture users who might work on the batch. For example, you might enter a note indicating that a page is missing from a specified document in the batch.

1. In the batch pane, select a batch.

   Batch information is displayed in the right pane. The **Priority**, **Status**, and **Batch Notes** fields are editable if the batch is locked to you. (If the batch is unlocked, lock it by clicking its triangle so the locked batch icon displays and the **Batch Notes** field becomes editable.)

2. In the **Batch Notes** field, enter, modify, or delete text.

3. Click **Apply**. A note icon in the Note column of the batch pane list indicates an attached note.

5.5 Releasing batches

Releasing a batch synchronizes its contents (documents and metadata) to the Capture server, removes its lock, and frees the batch for another user or a processor to work on. For example, after releasing a batch, it might undergo document conversion, bar code recognition processing, or as a last step, commit processing to a repository.

1. In the batch pane, select one or more batches. Hold down the Ctrl key to select multiple batches.

2. Click the **Release** button.

   A bar displays on the batch name and moves to the right to indicate release progress. During release, you can select other batches and documents to work on them.

3. Optionally click the **Refresh Batch List** button to view the new state of the batch. Once the release is complete, one of the following may happen:

   - The batch disappears from the batch pane, such as after a successful commit.

   - The batch's icon displays a processing indicator (as shown in Table 1–2), indicating that it is undergoing further processing.

   - The batch's icon displays an error indicator (as shown in Table 1–2), indicating that one or more of its documents encountered an error.

A

Troubleshooting

This appendix describes common problems that you might encounter when using the Oracle WebCenter Enterprise Capture client.

This appendix contains the following sections:

- Handling batch errors

A.1 Handling batch errors

You may occasionally encounter errors as you work with batches and release them. You may be able to resolve some common errors based on the error explanation provided. In other cases, you may need to contact your Capture workspace manager and provide the batch name and error displayed. This section lists some error examples.

For information on configuring logging, see Section A.1.1.

Errors while working on batches

- If you perform a database lookup and no records are found, the client displays the message, "No results were returned by the Database Lookup".

- If you select a batch locked to another user, a message displays that identifies the user and workstation. You cannot access batches locked by other users. Note that if multiple users are indexing batches, you may need to refresh the batch list before selecting a new batch. If needed, contact your Capture workspace manager.

Errors after releasing batches

- If an error occurs for a batch after you release it, such as during a post-processing step, the batch may display again in your batch pane, locked to you. (Note that a post-process may have renamed the batch.) You can right-click the document error icon and choose **Display Batch Error** from the menu to view the error details.

Figure A–1   Viewing Batch Errors
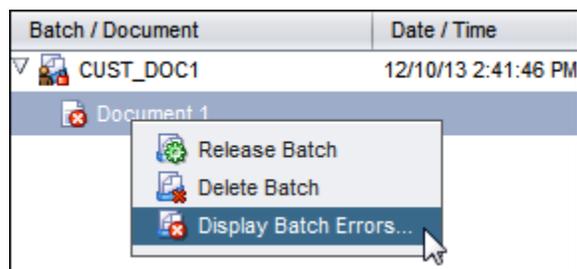
- If you released a batch without completing all required metadata fields in each document, an error occurs if Capture is set to commit the batch as a post-processing step. Typically, Capture commits all documents and removes them from the batch. However, documents that contain errors remain in the batch. To resolve the error, open the batch, complete all required metadata fields in all documents (an asterisk * is displayed to the left of their names), and release the batch again.

Figure A–2   Viewing Batch Processing Errors
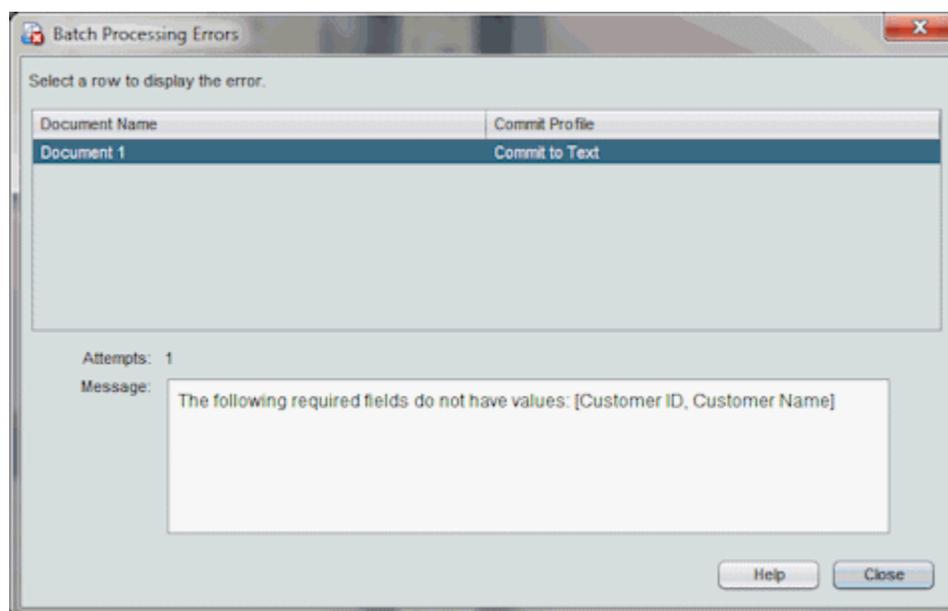
A.1.1 Setting batch logging

Logging can be useful for tracking or monitoring batches. If a Capture workspace manager requests logging, follow these steps to activate logging or change its detail level.

1. Click the **Preferences** link in the upper right area of the client window.

2. In the **Logging Level** field, select a new level.

   By default, logging is set to Off. Other values include Severe, Warning, Info, Config, Fine, Finer, Finest, and All.

Log files are stored locally in the .oracle_capture\Log directory in your home directory. A log file is named as follows: WC{date} where date is in the format of MMddyyyy.

3. Click **Save**.

B

Frequently Asked Questions

This appendix provides answers to frequently asked questions for the Oracle WebCenter Enterprise Capture client.

This appendix contains the following topics:

- Can I use my scanner's ISIS driver to scan documents?
- Can I use Kofax VRS to scan documents?
- Does the Capture client support 64 bit browsers?
- Which platforms support Searchable PDF?

Can I use my scanner's ISIS driver to scan documents?

No, the Capture client only supports TWAIN drivers. Most scanner manufacturers support the TWAIN standard. Contact your scanner manufacturer for more information.

Can I use Kofax VRS to scan documents?

Kofax VRS is supported using the TWAIN driver for VRS that is supplied with Kofax VRS. Consult your VRS documentation for more information.

Does the Capture client support 64 bit browsers?

No, the Capture client only supports 32 bit browsers currently. Refer to the Capture Certification Matrix for information on supported browsers.

Which platforms support Searchable PDF?

Refer to the Capture Certification Matrix for a list of supported platforms.