

Oracle® Document Capture

User's Guide

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Preface

The *User's Guide for Oracle Document Capture* describes how to use the application to scan, import, and index documents.

Audience

This document is intended for users performing document scanning, importing, and indexing.

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.
<i>italic</i>	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.

Overview

This guide describes how to use Oracle Document Capture to scan and index documents.

This chapter covers these main topics:

- ["About Oracle Document Capture"](#) on page 1-1
- ["Starting Oracle Document Capture"](#) on page 1-2
- ["About Batches, Documents, and Pages"](#) on page 1-2

1.1 About Oracle Document Capture

Oracle Document Capture provides production-level document scanning and indexing. It consists of several components:

Component	Description
Scan	<p>Use the Scan component to scan pages into batches. Batch scanning typically uses medium to high-speed scanners with automatic document feeders to scan paper into batches of 50 to 500 images. You can also import images.</p> <p>For example, the accounting department in a large corporation might get thousands of invoices every day. They need a way to store the information and be able to access it easily. Scan lets them scan and store the invoices electronically, so they can either discard the paper or put it in storage.</p> <p>Note that two versions of the Scan component are available: Scan for ISIS and Scan for Adrenaline.</p>
Index	<p>Use the Index component to index batches of scanned images. You index images by assigning one or more values to them in index fields.</p> <p>After indexing batches, you commit them in Index. Committing a batch creates documents from the images and archives them so they can be accessed in a content management system.</p> <p>When people look for documents later, they will look for the information you entered in these index fields. For example, when indexing accounting documents, you enter an invoice number for each page in a field called Invoice Number. Later, a person needing to locate an invoice would go into their content management system and find it by searching for the invoice number you entered.</p>
Batch Manager	<p>Use the Batch Manager component to view all Capture batches on the network. You can also use it to perform tasks such as moving or copying batches between file cabinets (for example, if scanned using the wrong profile), adding notes or changing batch status or priority.</p>

1.2 Starting Oracle Document Capture

Follow these steps to start the Oracle Document Capture application.

1. Double-click the Oracle Document Capture desktop icon.

Alternately, from the Start menu, select **Oracle Document Capture**, then **Oracle Document Capture**.

2. If needed, log in by entering your user name and password.

Whether you are required to log in depends on how the Capture administrator configured security options. Contact your Capture administrator for more information about logging in.

The Oracle Document Capture screen is displayed. Scan, Index, and Batch Manager components all work within this screen. The components available to you depend on your Capture installation.

3. Click the buttons on the toolbar to start Scan, Index, or Batch Manager.

1.3 About Batches, Documents, and Pages

Depending on the components you are assigned, you may scan and/or index batches in Oracle Document Capture. Regardless, it is important to understand how scanning creates batches and indexing creates documents within scanned batches.

- Scanning users scan or import groups of pages in batches, using settings saved by an administrator in a *scan profile*. During scanning, profile settings determine such things as how batches are named, if bar codes are read, if separator sheets are detected to aid in indexing, and whether skewed pages are automatically straightened. After a batch is scanned, scanning users can review its pages and make changes, such as re-scanning or inserting additional pages.
- Indexing users index scanned batches, using settings saved by an administrator in an *index profile*. During indexing, profile settings determine which index fields are displayed and how users complete them, such as by entering values or choosing from a pick-list. When an indexing user commits a batch, Index takes all pages with the same index values and merges them into a document. For more information about indexing methods and how indexing creates documents, see ["Indexing Documents"](#) on page 3-1.

Scanning Documents in Batches

This section covers the following topics:

- ["Before You Begin Scanning"](#) on page 2-1
- ["Scanning a Batch"](#) on page 2-1
- ["Importing Image Files"](#) on page 2-3
- ["Working with Scanned or Imported Batches"](#) on page 2-3
- ["Reviewing and Editing a Scanned Batch"](#) on page 2-7
- ["Using Scan Keyboard Commands"](#) on page 2-10

2.1 Before You Begin Scanning

Before you start scanning, you should:

1. Know which scan profile to use for the various document types you will scan. If needed, ask your Capture administrator.
2. Know how batches should be named. If needed, ask your Capture administrator.

See ["Assigning Batch Names"](#) on page 2-5.

Typically, the Capture administrator sets up the profile with a batch prefix so that batches are automatically named for you. However, you may be required to enter the batch name for each batch scanned.

3. Have one or more batches of papers ready for scanning.

Most organizations scan in batches that range from 50 to 500 pages per batch. Your Capture administrator can guide you on the number of pages to include in a batch.

4. Make sure the scanner is turned on.

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

2.2 Scanning a Batch

Follow the steps below to scan a batch.

1. Click the **Batch Scanning** button on the main toolbar in the Oracle Document Capture screen.

The Batch Scanning screen is displayed.

2. In the top field, select a scan profile.

The scan profile contains the scanning settings to be used.

3. If a prefix does not appear in the **Batch Name** field, enter a batch name.

You can type up to sixteen letters and/or numbers. For more information, see ["Assigning Batch Names"](#) on page 2-5.

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

5. Click the **Scan Preview** button on the toolbar.

As a test, Scan scans the top-most page and displays it. Check that the paper is loaded in the scanner the right way, so images are oriented the way you want them. If needed, reinsert the paper and repeat this step. Scan Preview does not create any batches.

6. Click the **Begin Scanning** button on the toolbar.

Scan begins scanning the documents. As each page is scanned, it is briefly displayed in the viewer. You can examine pages more closely and make changes to them after the batch is scanned. If you scan using a duplex scanner (a scanner that scans the front and back side in a single pass), Scan displays both the front and back page images while scanning.

To stop scanning, remove the remaining pages from the feeder tray of the scanner.

Note: If you encounter problems while scanning, and the scanner will not scan, first check that the cables are properly connected. You may also need to clear any errors on the scanner itself.

Note: Some Scan configurations include a Reset Scanner command in the Scanning menu. Selecting this command can resolve communications problems between the computer and the scanner.

7. Complete the batch.

Scan continues scanning and adding to the batch until there are no more pages on the feeder tray.

A message may display, asking if you want to continue scanning into the batch. To continue scanning into the same batch, add paper and click **Yes**. To finish the batch, click **No**.

The image viewer disappears from the screen, and the batch is added to the Batch Name list in the Batch Scanning screen and selected.

8. Click the **Review Batch** button.

Tip: You can also double-click a batch in the Batch Name list to review it.

The Reviewing Batch screen is displayed.

9. If needed, make changes to the batch.

Use options in the toolbar and in the Batch Scanning screen. See ["Working with Scanned or Imported Batches"](#) on page 2-3 and ["Reviewing and Editing a Scanned Batch"](#) on page 2-7.

2.3 Importing Image Files

Follow these steps to import images into a batch. In order to import, the scan profile must be set for importing. You can import images stored in a variety of formats.

1. Click the **Batch Scanning** button on the main toolbar in the Oracle Document Capture screen.
2. In the top field, select a scan profile.
3. Click the **Begin Scanning** button on the toolbar.
A Select Files to Import dialog box is displayed.
4. Select one or more image files to import and click **Open**.

Note: You can import a maximum of 999 image files per batch. If you select more than this, only the first 999 are included in the batch. After importing, you can append to or insert pages into the batch. (This limitation applies only to importing.)

Note: You can set a rotation for imported images, by clicking the Scanner Settings button and selecting a rotation.

2.4 Working with Scanned or Imported Batches

This section covers the following topics:

- ["Scanning a Test Page"](#) on page 2-3
- ["Temporarily Changing Scanner Settings"](#) on page 2-4
- ["Pausing While Scanning"](#) on page 2-4
- ["Assigning Batch Names"](#) on page 2-5
- ["Assigning Priority and Status"](#) on page 2-5
- ["Searching For Batches"](#) on page 2-5
- ["Displaying Scan Profile Information"](#) on page 2-6
- ["Using Batch Notes"](#) on page 2-6
- ["Deleting Batches"](#) on page 2-7

2.4.1 Scanning a Test Page

Use this option to test the scanner settings and image quality without saving the image.

1. In the Batch Scanning screen, select a scan profile.
2. Insert one or more pages in the feeder tray of the scanner.
3. Click the **Scan Preview** button on the Batch Scanning toolbar.
Scan scans and displays one page without creating a batch.

4. Adjust scanner settings, if needed.

For example, the text on pages in a batch might be too light, so you might adjust the contrast and brightness for that batch. See ["Temporarily Changing Scanner Settings"](#) on page 2-4 for details about changing scanner settings.

2.4.2 Temporarily Changing Scanner Settings

Follow these steps to view and, if needed, change scanner settings.

Note: Scanner settings you change remain until you select a profile—either the profile you selected when you started scanning or another one. If you want the new settings to be permanent, ask the Capture administrator to update the scan profile.

1. Click the **Scanner Settings** button on the Batch Scanning toolbar.
2. Make changes to your scanner settings.

Note: If needed, reapply the profile scanner settings by re-selecting the profile from the list at the top of the Batch Scanning screen.

The dialog box that appears depends on your Scan configuration and whether you are using Scan for ISIS or Scan for Adrenaline.

3. If needed, adjust advanced scanner settings.

Click the **Options**, **Advanced**, or **More** buttons to display additional advanced options. Advanced settings are specific to the selected scanner. For example, advanced options might include brightness and contrast levels or dropout color settings.

2.4.3 Pausing While Scanning

Note: This option is available only when using Scan for Adrenaline.

You may want to examine each page in a batch as it is scanned. Scanning in this way reduces the speed at which you scan batches, but allows you to check each image.

To pause while scanning a batch, check the Pause After Every Page field at the bottom of the Batch Scanning screen. When this field is checked, Scan scans a page, then waits for direction from you. Use the Pause After Every Page screen Scan displays to control pausing:

- Click **Continue** to save the currently displayed image and continue scanning with the next page in the document feeder.
- **Re-scan** deletes the currently displayed image and, if you place the same page back in the scanner, re-scans the same page. Place the page to be re-scanned in the feeder first, then click **Re-scan**.
- Click **Scanner Settings** to temporarily change the scanner settings for the current batch (see ["Temporarily Changing Scanner Settings"](#) on page 2-4). Scan displays the Scanner Properties dialog box.

Note: After you finish scanning the batch, you can return to the scan profile scanner settings by selecting the scan profile again.

- Click **Quit** to complete the current batch and stop scanning.

2.4.4 Assigning Batch Names

How you assign names to batches depends on how the Capture administrator set up the scan profile.

- If a batch name displays when you select a scan profile, auto-sequenced names have been configured. Scan batches are automatically named with a common prefix followed by a number that increases by one with each batch. For example, if you are scanning invoices, batches might be automatically a prefix of INV, followed by multiple zeros, then a number (as in INV00000000000001, INV00000000000002, INV00000000000003, and so on).
- If no batch name displays, enter a unique name for each batch before scanning.
- If a name automatically appears in the Batch Name field, you may be able to change it. (If the profile does not allow batch name editing, the batch prefix cannot be changed.) For example, if a scan profile uses a prefix of PAY, and you want to create a batch with the name of OTHER, you would type OTHER in the Batch Name field. Once you click the Begin Scanning button, Scan detects that the batch name is different from the original prefix and creates a batch called OTHER.
- To resume using auto sequencing, either re-select the scan profile from the list or retype the original batch prefix.
- To rename a batch at any time after scanning, right-click the batch in the Batch Scanning screen, choose the Rename command and enter a new name.

2.4.5 Assigning Priority and Status

Follow these steps to assign or change a batch's priority and status. You can also change a batch's priority and status when indexing it by clicking the Priority/Status toolbar button.

1. Select the batch for which you want to assign a priority or status.
2. Click the right mouse button.
3. From the menu that displays, choose the Edit Status command.
The Batch Status dialog box displays.
4. Use the arrow buttons in the Priority field to choose a priority number. Select or enter a status in the Status field.
5. Click **OK**.

The new priority and/or status you assigned is displayed for the batch in the Batch Scanning screen.

2.4.6 Searching For Batches

You can search for batches in a variety of ways.

Note: The list of batch names that appears in the Batch Scanning screen may include batches created by you or others on the network. Other people on the network may be scanning and creating batches at the same time as you are.

1. In the Batch Scanning screen, select a profile and click the **Search** button.
The Batch Search Criteria dialog box displays.
2. Specify search options.
To display all batches for the selected scan profile, leave the fields blank.
3. Click **OK**.
The Batch Scanning screen now lists the batches found in your search.

2.4.7 Displaying Scan Profile Information

To display details about a scan profile:

1. Select the scan profile from the drop-down list on the Batch Scanning toolbar.
2. Click the **Scan Profile Information** button on the toolbar.
The Scan Profile Information screen is displayed, showing the properties of the selected scan profile.

2.4.8 Using Batch Notes

Follow these steps to add or edit notes. You can also add notes when indexing a batch by clicking the **Note** toolbar button.

1. In the Batch Scanning screen, select a batch.
2. Click the right mouse button.
3. From the menu that displays, choose **Edit Note**.
The Note screen appears.
4. Enter or edit the note.
You can include detailed notes. The lower left corner lists the last user to edit the note and the time at which the note was updated.
5. When done, click the x in the upper right-hand corner.
The note is saved. A push pin now appears in the note symbol.

To delete a note:

1. Select the batch whose note you want to delete.
2. Click the right mouse button.
A menu appears.
3. From the menu that displays, choose **Delete Note**.
The note is deleted. A push pin no longer appears in the note symbol.

2.4.9 Deleting Batches

Occasionally, you may need to delete a batch. For example, you may have changed scanner settings and decide to delete a batch and re-scan it. You can also delete only certain pages from a batch, as described in ["Deleting Pages From a Batch"](#) on page 2-10.

1. In the Batch Name list in the Batch Scanning screen, click the batch you want to delete.
2. Click the **Delete Batch** button on the toolbar.
You are asked to confirm that you want to delete the batch.
3. Click **Yes** to delete it; click **No** to cancel.

2.5 Reviewing and Editing a Scanned Batch

After scanning a batch, you may want to view it or make changes to its pages.

1. In the Batch Name list in the Batch Scanning screen, click the batch you want to review.

For details about searching, see ["Searching For Batches"](#) on page 2-5.

2. Click the Review Batch button on the toolbar.

The first page of the batch is displayed in the Reviewing Batch screen.

3. Review and edit the batch.

Select from the following topics:

- ["Rotating and Flipping Pages"](#) on page 2-7
- ["Changing the Image Display"](#) on page 2-8
- ["Displaying or Hiding Images and Thumbnails"](#) on page 2-8
- ["Appending Pages to a Batch"](#) on page 2-8
- ["Inserting Pages in a Batch"](#) on page 2-9
- ["Replacing Pages in a Batch"](#) on page 2-9
- ["Deleting Pages From a Batch"](#) on page 2-10
- ["Viewing Page Information"](#) on page 2-10

2.5.1 Rotating and Flipping Pages

To rotate a selected image within the viewer, click one of the Rotate buttons on the Reviewing Batch toolbar.

- Click **Rotate Left** to rotate the image 90 degrees counterclockwise.
- Click **Rotate Right** to rotate the image 90 degrees clockwise.
- Click **Flip** to rotate the image 180 degrees.

When an image is rotated, it is saved that way within the batch.

If you want all images rotated (landscape mode), speak with your Capture administrator about having the scan profile changed accordingly. For some Scan configurations, you can temporarily change the scanner setting options (see ["Temporarily Changing Scanner Settings"](#) on page 2-4) from the Batch Scanning screen.

Note: You can rotate multiple pages at once, by holding down the Ctrl key while clicking their thumbnail images, then clicking one of the Rotate buttons.

2.5.2 Changing the Image Display

Use the Zoom In, Zoom Out and Fit to Window buttons to enlarge or reduce the image in the viewer to ensure good image quality. (These settings are not saved with the batch.)

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

2.5.3 Displaying or Hiding Images and Thumbnails

Use the Page View button to change how pages and thumbnails are displayed in the Reviewing Batch screen. Click the arrow to the right of the button to select a different view, or click the button repeatedly to switch between the view options.

- Choose **Thumbnail View** to view thumbnail images only. From the thumbnail view, you can double-click any thumbnail to display a page view of it.
- Choose **One Page View** to view a selected page only.
- Choose **Page and Thumbnail View** to view thumbnails and batch pages. A bold outline highlights the selected thumbnail.

Dragging and Dropping Thumbnails

You can reposition pages in the batch by dragging and dropping them. Click a thumbnail, hold down the mouse button as you drag it to a new location, and release the mouse button. The pages are repositioned.

Adjusting the Thumbnail Display

Use the View menu commands to change the size, position or color of thumbnail images:

- To change their size, choose **View**, then **Thumbnail Size**, and select **Small**, **Medium** or **Large**.
- To change their position in the Reviewing Batch screen, choose **View**, then **Thumbnail Position**, and select **Left**, **Right**, **Top** or **Bottom**.
- To change the color in which the selected thumbnail is highlighted, choose **View**, then **Thumbnail Highlight Color**, and select a color from the Color popup that appears.

2.5.4 Appending Pages to a Batch

Occasionally, you may need to add pages to a previously created batch. You can either append them (add them to the end) as described below, or insert them between other pages in the batch (as described in ["Inserting Pages in a Batch"](#) on page 2-9).

1. Place the pages to append in the paper tray of the scanner.
2. In the Batch Scanning screen, select the batch you want to append to, and click the Review Batch button.

(For more information, ["Reviewing and Editing a Scanned Batch"](#) on page 2-7.)
The first image of the batch is displayed.

3. Click the Append Page(s) button on the Reviewing Batch toolbar.

Scan begins scanning the pages to be appended, and continues scanning until there is no more paper in the feeder.

4. Page through the images to the end to see the appended pages.

Another way of appending pages to a batch:

1. Place the pages to append in the paper tray of the scanner.
2. In the Batch Name field in the Batch Scanning screen, type the name of the batch you want to append the pages to.
3. Click the Begin Scanning button.

(For more information, see ["Reviewing and Editing a Scanned Batch"](#) on page 2-7.)

Since you entered the name of a batch that already exists, Scan asks if you want to append to (add pages at the end) the batch.

4. Click **Yes**.

2.5.5 Inserting Pages in a Batch

Follow these steps to insert new pages between other pages in a batch. Another option is to append them (add them to the end), as described in ["Appending Pages to a Batch"](#) on page 2-8.

1. Place the pages to insert in the paper tray of the scanner.
2. In the Batch Scanning screen, select the batch you want to add to, and click the Review Batch button.

(For more information, see ["Appending Pages to a Batch"](#) on page 2-8.) The first image of the batch is displayed.

3. Navigate to the page before which you want to insert one or more pages.
4. Click the Insert Pages button on the Reviewing Batch toolbar.

(For more information, see ["Appending Pages to a Batch"](#) on page 2-8.) The first image of the batch is displayed.

5. Page through the new images to verify them.

2.5.6 Replacing Pages in a Batch

Follow these steps to delete a page and add a new page in its place.

1. Place the page to replace in the paper tray of the scanner.
2. In the Batch Scanning screen, select the batch containing the page you want to replace, and click the Review Batch button.

(For more information, see ["Reviewing and Editing a Scanned Batch"](#) on page 2-7.)
The first image of the batch is loaded.
3. Navigate to the page you want to replace.
4. Click **Replace Pages** on the Reviewing Batch toolbar.

Scan scans the page in the scanner and replaces the old image with the new page.

2.5.7 Deleting Pages From a Batch

Follow these steps to delete one or more pages in a batch. You can also delete an entire batch, as described in ["Deleting Batches"](#) on page 2-7.

1. In the Batch Scanning screen, select the batch containing the page you want to delete, and click the Review Batch button.

The first image of the batch is loaded.
2. Navigate to the page you want to delete.
3. Click the Delete Page button on the Reviewing Batch toolbar.

You are asked to confirm that you want to delete the page.
4. Click **Yes**.

The page is deleted.

Note: You can delete multiple pages at once, by holding down the Ctrl key while clicking their thumbnail images, then clicking the Delete Page button.

2.5.8 Viewing Page Information

You can display a screen that shows information about the selected page. The screen remains on the screen, allowing you to monitor information for the selected page. You can also copy the screen contents to the clipboard by choosing Copy from the File menu. You might do this, for example, to copy and paste the page information to a spreadsheet application if instructed by a Capture administrator.

1. With the batch displayed, click the Page Information button on the Reviewing Batch toolbar.


The Page Information dialog box is displayed.

2.6 Using Scan Keyboard Commands







When viewing a scanned batch, you can use the toolbar buttons or commands on the Scanning, Review and View menus. To further speed up scanning, use the keyboard shortcuts provided on these menus:

- ["Scanning Menu"](#) on page 2-10
- ["Review Menu"](#) on page 2-11
- ["View Menu"](#) on page 2-11



2.6.1 Scanning Menu

Command	Button	Description	Shortcut
Scan Batch		Begins scanning a new batch.	F5

2.6.2 Review Menu

Command	Button	Description	Shortcut
Append Page(s)		Begins scanning pages to be added to the end of the batch.	Ctrl + A
Insert Page(s)		Begins scanning pages and inserts them before the selected page.	Ctrl + E
Replace Page		Scans the page in the scanner and replaces the old image with the new page.	Ctrl + R
Delete Page		Deletes the currently displayed page.	Ctrl + D
Previous Page		Displays the previous page in the batch.	Ctrl + P
Next Page		Displays the next page in the batch.	Ctrl + N

2.6.3 View Menu

Command	Button	Description	Shortcut
Zoom In		Zooms in on the image.	Ctrl + I
Zoom Out		Zooms out of the image.	Ctrl + O

Indexing Documents

To index documents, you open a previously scanned or imported batch and complete index fields.

You can perform all indexing tasks using keyboard shortcuts, as described in ["Using Index Keyboard Commands"](#) on page 3-9. Using the keyboard shortcuts can save time, by reducing the use of the mouse.

This section covers the following topics:

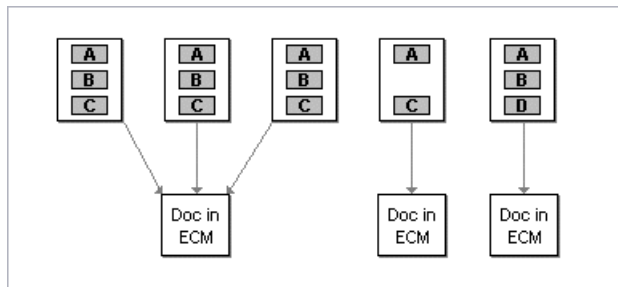
- ["How Indexing Changes Images Into Documents"](#) on page 3-1
- ["Methods of Indexing"](#) on page 3-2
- ["Before You Begin Indexing"](#) on page 3-3
- ["Indexing a Batch"](#) on page 3-4
- ["Working With Index Batches"](#) on page 3-4
- ["Indexing and Editing a Selected Batch"](#) on page 3-5
- ["Using Index Keyboard Commands"](#) on page 3-9

3.1 How Indexing Changes Images Into Documents

You index images by assigning one or more values to them in index fields. When people search for documents later, they will look for the information you entered in these index fields. Entering values in several fields for an image gives people multiple ways of searching for documents.

After indexing a batch, you commit them in Index. Committing creates documents from the images and archives them so they can be accessed in the electronic content management (ECM) system. Index takes all images with the same index values and merges them into a document. For example, Index might combine all accounting pages with the same invoice number, company name and date of invoice into one document.

When it encounters a different value for any of these fields during the committing process, it creates a new document. After images are committed, they are removed from the batch and no longer available.



Keep these guidelines in mind when indexing images into documents.

- A document is created from more than one image when all of the index field values among the images are exactly the same. Even if one image has three fields filled in and another image has two fields filled in with the same values, two documents are created. Images must have the same number of fields and the exact same values to be combined into a document.
- An image is indexed if there is a value in any of its index fields.
- Unindexed images—those without any fields filled in—stay in the batch when you commit it. For example, if you commit a batch containing 20 images but three of those images do not contain any index values, the batch remains in the list after committing, but now contains 3 images instead of 20.
- Images with required index fields that are left blank will not be committed. Required fields must be filled in before their images can be committed.

Note: Required index fields display an asterisk (*) in front of their names.

3.2 Methods of Indexing

The specific way you index depends on how the Capture administrator set up the index profile.

- A typical method is to type a value in each field and press the Tab or Enter key to move to the next field. After you enter a value in the last field and press Tab or Enter, the next image is displayed. If you decide that the image should be part of the same document—and therefore needs the same index values—you can easily copy and paste them instead of retyping all of them.
- Index values may automatically appear in some fields without you typing anything. Or, you may fill in fields on one image, and those same values are automatically copied into the same fields on other images.
- Instead of typing a value, you may choose one from a **pick-list** that appears. Click the triangle on the field and select a value from the list that displays. You can also use the arrow keys on your keyboard to scroll up and down through the list, and press Enter to select a value. In addition, you can begin typing a value, and the first item in the list that begins with the characters you type will be automatically selected.

- **Separator sheets** may have been used when scanning. Separator sheets use patch codes or bar codes to indicate where one document ends and the next one begins. This allows you to enter values in index fields once, then apply those values to all corresponding index fields on all images between the separator sheets.
- You may be limited to typing only a certain number of characters or typing them in a specific format. For example, you might be constrained to typing nine numbers in an index field called Social Security Number, and dashes might appear in the field.
- Index fields might be required. Or, you might be required to enter a value twice to confirm that it was entered correctly; for example, you might need to do this when entering dollar amounts.
- Some fields might be locked, preventing you from changing values.
- A turquoise box may appear in different locations on the image as you enter or select index fields. These are zones the Capture administrator set up to highlight areas as you index. (You can turn display of the zones on and off using the Toggle Zones button.) For example, a zone might highlight an area showing the invoice number so you can quickly find it and type it in the current field. If you zoom in when zones are in effect, Index zooms in on the zone area, and saves the zoom setting. If the OCR (Optical Character Recognition) option is available, characters from the zone might be automatically entered in the current field, leaving you to verify that they are correct.
- If OCR is active, you can also click and drag using the right mouse button to select any area on the image, and Index will capture the scanned words and insert them into the selected index field. If you want Index to perform OCR on all fields for which it has been set up, choose the OCR Zone(s) command from the Edit menu.

Note: OCR technology is not always accurate so be certain to verify each OCR field.

- Another way of completing index fields is using a **database lookup**. This option lets you search a database based on the current field in which the cursor is positioned. You enter characters to search for in the field and click Database Lookup. Index searches the database and displays values that match in a hit list. You select the value you want, and that value, along with other values from the database record, are inserted into the index fields. Using a database in this way increases the speed at which you can index and eliminates typing errors.

For example, you might enter the first few letters of a customer's company name in an index field called Company and perform a database lookup. Index would search a database for records with company names starting with those letters and display a hit-list. After you choose the appropriate record from the hit-list, Index would complete the other fields for you with information from the database record.

Depending on how the Capture administrator sets up the database lookup, you may not see a hit-list when you select the Database Lookup button. Index might find only one matching value and automatically populate the remaining fields.

3.3 Before You Begin Indexing

Before you start indexing, you should:

1. Have at least one batch scanned and ready to index.
2. Know which index profile you will use. If needed, ask your Capture administrator.
3. Have a general idea of which fields you will be entering index values into, and how you will enter them.
4. Understand how documents are created from batches of images (see "[How Indexing Changes Images Into Documents](#)" on page 3-1).

3.4 Indexing a Batch

Follow the steps below to index a batch.

1. Click the Batch Indexing button on the main toolbar in the Oracle Capture screen.

The Batch Indexing screen is displayed.

2. In the Available Index Profiles field, select an index profile.

The Batch Indexing screen is displayed.

3. From the batch list table, click a batch to index and click **Select**.

The Indexing Batch screen is displayed. The side pane contains the index fields into which you enter values. Another pane displays the first image in the batch, and a third pane displays thumbnail images. (Depending on view options, the image or thumbnails pane may not be displayed.)

4. Enter values in the index fields.

How you enter values is determined by the index profile. See "[Methods of Indexing](#)" on page 3-2 for more information.

Press the Tab or Enter key to move to the next field.

5. Use the buttons on the Indexing toolbar to help you index images.

See "[Working With Index Batches](#)" on page 3-4 for more information.

6. When done indexing the batch, click the Commit button. Confirm the commit.

As Index commits images in the batch, it displays information in the status bar. When done, *Commit Complete* is displayed, the Indexing Batch screen closes, and the Batch Indexing screen is displayed.

- If all images were committed, the batch is no longer displayed in the batch list.
- If one or more images were not committed, the batch remains in the batch list, with the number of remaining pages listed.

3.5 Working With Index Batches

This section covers the following topics:

- ["Searching For Batches"](#) on page 3-4
- ["Using Notes With Batches"](#) on page 3-5
- ["Changing Batch Status and Priority"](#) on page 3-5
- ["Deleting Batches"](#) on page 3-5

3.5.1 Searching For Batches

You can search for batches in a variety of ways.

1. In the Batch Indexing screen, select a profile and click the Search button.
The Batch Search Criteria dialog box displays.
2. Specify search options.
To display all batches, leave the fields blank.
3. Click **OK**.

The Batch Indexing screen now lists the batches found in your search.

3.5.2 Using Notes With Batches

Follow these steps to add, edit or delete notes.

1. Display the batch note.
 - When selecting batches, right-click the batch and choose the Edit Note command from the menu that appears. To delete a note, choose the Delete Note command.
 - When reviewing batches, click the Batch Note button on the toolbar.
2. In the note screen, enter, edit or delete a note.
When reviewing batches, click the Batch Note button on the toolbar.
3. Click the close box to save note changes.

3.5.3 Changing Batch Status and Priority

Follow these steps to change a batch status and priority.

1. Display the Batch Status dialog box.
 - When selecting batches, right-click the batch and choose the Edit Status command from the menu that appears.
 - When reviewing batches, click the Edit Batch Status and Priority button on the toolbar.
2. In the Batch Status dialog box, change the batch status and/or priority.
 - Specify a new priority number in the Priority field by typing or using the arrow buttons.
 - Select or type a status in the Status field. Click **OK**.

Note: If you want additional status values added to the list, contact your Capture administrator.

3.5.4 Deleting Batches

Occasionally, you may need to delete a batch. You can also delete specific pages in a batch, as described in ["Deleting Batches"](#) on page 3-5.

1. In the Batch Indexing screen, click the batch you want to delete.
2. Click the Delete button. Confirm the deletion.

3.6 Indexing and Editing a Selected Batch

Follow these steps to index and edit a batch.

1. In the Batch Name list in the Batch Indexing screen, double-click a batch.

For details about searching, see ["Searching For Batches"](#) on page 3-4.

The first page of the batch is displayed in the Indexing Batch screen.

2. Complete the index fields.

Select from the following topics:

- ["Displaying or Hiding Images and Thumbnails"](#) on page 3-6
- ["Rotating Pages"](#) on page 3-7
- ["Changing the Image Display"](#) on page 3-7
- ["Indexing With Zone Highlights and OCR"](#) on page 3-7
- ["Applying Values From an External Database"](#) on page 3-7
- ["Indexing With Separator Sheets"](#) on page 3-8
- ["Duplicating Pages"](#) on page 3-8
- ["Deleting Pages"](#) on page 3-8
- ["Copying, Pasting, and Clearing Page Indexes"](#) on page 3-9
- ["Searching Field Indexes"](#) on page 3-9
- ["Viewing Page Information"](#) on page 3-9

3.6.1 Displaying or Hiding Images and Thumbnails

Use the Page View option to change how images are displayed in the Indexing Batch screen.

Click the arrow to the right of the Page View button to select a different view, or click the button repeatedly to switch between the view options.

- Choose **Thumbnail View** to view thumbnail images only. From the thumbnail view, you can double-click any thumbnail to display a page view of it.
- Choose **One Page View** to view a selected page only.
- Choose **Page and Thumbnail View** to view thumbnails and batch pages. A bold outline highlights the selected thumbnail.

3.6.1.1 Dragging and Dropping Thumbnails

You can reposition pages in the batch by dragging and dropping them. Click a thumbnail, hold down the mouse button as you drag it to a new location, and release the mouse button. The pages are repositioned.

3.6.1.2 Adjusting the Thumbnail Display

Use View menu commands to change the size, position or color of thumbnail images:

- To change their size, choose **View** then **Thumbnail Size** and select **Small**, **Medium** or **Large**.
- To change their position in the Reviewing Batch screen, choose **View** then **Thumbnail Position** and select **Left**, **Right**, **Top** or **Bottom**.
- To change the color in which the selected thumbnail is highlighted, choose **View** then **Thumbnail Highlight Color** and select a color from the Color popup that appears.

3.6.2 Rotating Pages

To change the color in which the selected thumbnail is highlighted, choose **View** then **Thumbnail Highlight Color** and select a color from the Color popup that appears.

- Click **Rotate Left** to rotate the image 90 degrees counterclockwise.
- Click **Rotate Right** to rotate the image 90 degrees clockwise.
- Click **Flip** to rotate the image 180 degrees.

When an image is rotated, it is saved that way within the batch.

3.6.3 Changing the Image Display

Use the Zoom In, Zoom Out and Fit to Window buttons to enlarge or reduce the image in the viewer to ensure good image quality. (These settings are not saved with the batch.)

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

3.6.4 Indexing With Zone Highlights and OCR

Zone highlighting and OCR may be configured in the index profile. As you select and enter values in index fields, a turquoise box may appear in different locations on the image. (See "[Methods of Indexing](#)" on page 3-2 for more information about zones.)

Follow these steps.

- Turn the zone highlights on or off by clicking the Toggle Zone Display button on the Indexing toolbar.
- If you zoom in when zones are in effect, Index zooms in on the zone area, and saves the zoom setting.

- If the OCR (Optical Character Recognition) option is available, characters from the zone might be automatically entered in the current field, leaving you to verify that they are correct. OCR is performed on unindexed images only.
- If OCR is active, you can also click and drag using the right mouse button to select any area on the image, and Index will capture the scanned words and insert them into the selected index field. If you want Index to perform OCR on all fields for which it has been set up, choose the OCR Zone(s) command from the Edit menu.

3.6.5 Applying Values From an External Database

Follow these steps to perform a database lookup. For more information about database lookups, see ["Methods of Indexing"](#) on page 3-2.

1. In the Indexing screen, select an index field on which the Database Lookup button on the toolbar is active.

If the Database Lookup button is disabled, a database lookup is not available.

2. In the index field, enter characters to search the database for.

For example, enter the first few letters of a company name or the first few digits of an account number. Leaving the index field blank returns all matching records in a hit-list.

3. Click the Database Lookup button on the toolbar.

Index searches the database for matching records. Depending on profile options, one of the following may occur:

- a hit list with matching record may be displayed
 - if one matching record was found, index fields may be automatically populated
 - a message may be displayed that no matching records were found
4. If needed, select a matching value from the hit list or enter new search characters.

3.6.6 Indexing With Separator Sheets

Separator sheets indicate where one document ends and the next one begins. If they were placed and scanned between documents, use the following commands to speed up indexing.

- Enter index values for the first page of a document, then choose the File to Separator command in the Batch menu to apply those values to all images between the separator sheets.
- Quickly move between documents by clicking the Prev Doc and Next Doc toolbar buttons that are available when separator sheets are used.

3.6.7 Duplicating Pages

Occasionally, you may need to copy and paste images in a batch. For example, if you were indexing insurance forms, you might have policy pages needing to be indexed to different accounts.

To duplicate one or more pages and paste them directly after the copied pages:

1. Display the page you want to duplicate.
(If you are duplicating multiple pages, you do not need to do this, but note the numbers of the pages you want to duplicate.)
2. Click the Duplicate Page(s) button on the toolbar.
The Duplicate Page(s) dialog box is displayed.
3. Select duplicate options and click **OK**.
The pages are copied and pasted directly after the last page you selected to duplicate.

3.6.8 Deleting Pages

Occasionally, you may need to delete one or more pages in a batch.

1. Display the page you want to delete.
(If you are deleting multiple pages, you do not need to do this, but note the page numbers you want to delete.)
2. Click the Delete Page button on the toolbar.
The Delete Page(s) dialog box is displayed.
3. Select delete options, click **OK** and confirm the deletion.

3.6.9 Copying, Pasting, and Clearing Page Indexes

When indexing, you can apply index values entered for one page to other pages, so they will be merged into the same document when committed. (For more information, see ["How Indexing Changes Images Into Documents"](#) on page 3-1.)

- To copy index values, display the page whose index values you want to copy, and click the Copy Page Indexes button.
- To then paste index values, display the page you want to copy to, and click the Paste Page Indexes button.
- To start over indexing an image, click the Clear All Indexes button.
- Use the Apply Values to Remaining Pages button to apply the current page's index values to all pages after it. (Index values on images before the current image are not affected.) You can also select this command after clearing index values to clear all values from remaining pages.
- If separator sheets are used, enter values in index fields once, then choose the File to Separator command in the Batch menu to apply those values to all corresponding index fields on all images between the separator sheets.

3.6.10 Searching Field Indexes

Use the Find option to search for images containing a certain index value or to search for images without any index entries.

1. Click the Find button on the Indexing toolbar.

The Find dialog box is displayed.

2. Enter search options and click **OK**.

Index searches and displays the first page it finds that matches the search options you chose.

3. Press the F3 key to search again.

3.6.11 Viewing Page Information

You can display a screen that shows information about the selected page. The screen remains on the screen, allowing you to monitor information as the page changes.

1. With the batch displayed, click the Page Information button on the Reviewing Batch toolbar.





The Page Information dialog box is displayed.


3.7 Using Index Keyboard Commands

When indexing a batch, you can use the toolbar options or commands on the Edit, View and Batch menus. (These menus are displayed only when the Indexing Batch window is displayed.) To further speed up indexing, use the keyboard shortcuts provided on these menus:








- ["Edit Menu"](#) on page 3-10
- ["View Menu"](#) on page 3-10
- ["Batch Menu"](#) on page 3-11

3.7.1 Edit Menu




Command	Button	Description	Shortcut
Copy Page Indexes		Copies all index values on the current page for pasting.	Ctrl + K
Paste Page Indexes		Pastes the index values you previously copied into corresponding index fields on the current page.	Ctrl + J
Clear All Indexes		Clears all index values on the current page.	Ctrl + E
Find		Searches for the next page with no index values (un-indexed image) or the index value you enter. Press the F3 key to search for the next instance.	Ctrl + F
Find Next		Search again, using the last criteria you entered.	F3

Command	Button	Description	Shortcut
OCR Zone(s)		Perform optical character recognition on an indexed image (on all fields for which OCR has been defined).	F5
Duplicate Page(s)		Duplicates a page (or range of pages) and appends them after the current page(s).	Ctrl + D

3.7.2 View Menu

Command	Button	Description	Shortcut
Previous Page		Displays the previous page in the batch.	Ctrl + P
Next Page		Displays the next page in the batch. (Pressing Tab or Enter when the cursor is in the last field on the image also moves you to the next page.)	Ctrl + N
Zoom In		Zooms in on the image.	Ctrl + I
Zoom Out		Zooms out of the image.	Ctrl + O
Fit to Window		Displays the image at the maximum size at which it will fit in the window.	Ctrl + W
Rotate Right		Rotates the image clockwise 90 degrees. The image is saved as rotated.	Ctrl + R
Rotate Left		Rotates the image clockwise 90 degrees. The image is saved as rotated.	Ctrl + T

3.7.3 Batch Menu

Command	Button	Description	Shortcut
Apply Values to Remaining Pages		Copies all index values for the current image to corresponding fields on all remaining pages in the batch.	Ctrl + A
File To Separator Page		Applies values entered in index fields to all corresponding index fields on all images between the separator sheets.	Ctrl + S
Commit Batch		When finished indexing a batch, creates documents from images for use in the content management system.	Ctrl + B
Database Lookup		Searches an external database using data from the current index field.	Ctrl + L

Managing Batches

This chapter describes how you work with scanned and index batches. It covers these main topics:

- ["Assigning Batch Priority and Status"](#) on page 4-1
- ["Searching For Batches"](#) on page 4-1
- ["Attaching Batch Notes"](#) on page 4-2
- ["Using the Batch Manager"](#) on page 4-2

4.1 Assigning Batch Priority and Status

The Priority and Status options allow you to attach special information to a batch. You might want to alert other users about a particular batch, by assigning it a high priority number (from 1 to 10, where 10 is the highest priority.) Or, you might want to assign it a status of RUSH or type in a new status.

- The Priority column can contain a number from 0 to 10, where 10 is the highest priority.
- The Status column can contain a status, which you select from a list of statuses created by the Capture administrator. You can also type in a new status, if needed.

A batch may already have a priority and status assigned to it when you create it. For example, the priority might be 0 and the status might be None. You can change this priority and/or status.

4.2 Searching For Batches

You can search for batches in a variety of ways.

Note: The list of batch names that displays may include batches created by you or others on the network. Other people on the network may be scanning and creating batches at the same time as you are.

You can sort the batch list by clicking any of the column headings in the Batch Scanning or Batch Indexing screens. This allows you to sort by such items as Batch Name, Date/Time, Priority or Status. Click the heading again to change the sorting direction.

4.3 Attaching Batch Notes

Notes provide a way of highlighting and storing information about a specific batch. You might enter a note, for example, if you need to append pages to a batch later, or want to highlight something for the person who will be indexing the batch.

Note: You enter and use notes the same way in Scan and Index. Notes you enter in Scan are displayed in Index, and vice versa.

If a batch has a note attached to it, a push pin appears on the note symbol.

4.4 Using the Batch Manager

In Capture, batches are stored in file cabinets. Scan and index profiles determine the file cabinet in which a batch's images and index values are stored. Batch Manager provides a comprehensive view of all Capture batches on the network in a Windows Explorer-like environment. Use Batch Manager to:

- view the batches in a file cabinet
- add or edit notes for a batch
- change the status and priority of a batch
- move batches between file cabinets
- delete batches
- view information about the pages in a batch, including index values, file name, location and size
- copy a batch from one file cabinet to another

In order to use Batch Manager, it must be configured on your computer. You can view and make changes to batches whose file cabinet you are assigned.

Follow these steps to use Batch Manager.

1. Choose **Open Batch Manager** from the Batch Manager menu.

Batch Manager is displayed. The side pane lists all file cabinets configured on the network in a tree view. By expanding items in the side pane, you can view a file cabinet's batches, and a batch's pages. The large pane displays information about the item selected in the side pane.

2. Select items in the side pane.

After you select an item, a plus (+) sign is displayed if the item has contents. Click the plus (+) sign to display contents.

3. If needed, make changes to a selected item using the toolbar buttons.

When a batch is selected in the left pane, the toolbar buttons become active.

- Click **Refresh** to re-display the list of file cabinets and batches. Batch Manager includes all file cabinets on the network, and users may have added new batches since you entered Batch Manager.

- Click the **Cut Batch**, **Copy Batch**, **Paste Batch**, or **Delete Batch** buttons as needed. For example, if batches were scanned using the wrong profile and assigned to the wrong file cabinet, you could cut and paste them to the correct file cabinet.

Note: Moving batches from one file cabinet to another moves their images only. Index values are removed when you move a batch.

User Interface

Oracle Document Capture contains a number of user interface screens:

General Screens

- ["Capture Login Screen"](#) on page A-2
- ["Oracle Document Capture Screen"](#) on page A-2
- ["Batch Manager Screen"](#) on page A-3
- ["Batch Search Criteria Screen"](#) on page A-4

Scan Screens

- ["Batch Scanning Screen"](#) on page A-6
- ["Scanner Settings Screen"](#) on page A-8
- ["Scanner Properties Screen"](#) on page A-10
- ["Import Settings Screen"](#) on page A-9
- ["Reviewing Batch Screen"](#) on page A-11
- ["Scan Profile Information Screen"](#) on page A-13

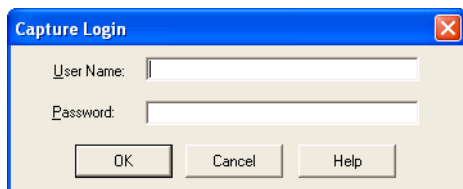
Index Screens

- ["Batch Indexing Screen"](#) on page A-14
- ["Indexing Screen"](#) on page A-15
- ["Duplicate Pages Screen"](#) on page A-18
- ["Delete Pages Screen"](#) on page A-18
- ["Find Screen"](#) on page A-19

A.1 Capture Login Screen

Use this screen to log in to Capture.

Display this screen by starting Oracle Document Capture from the Start menu options.

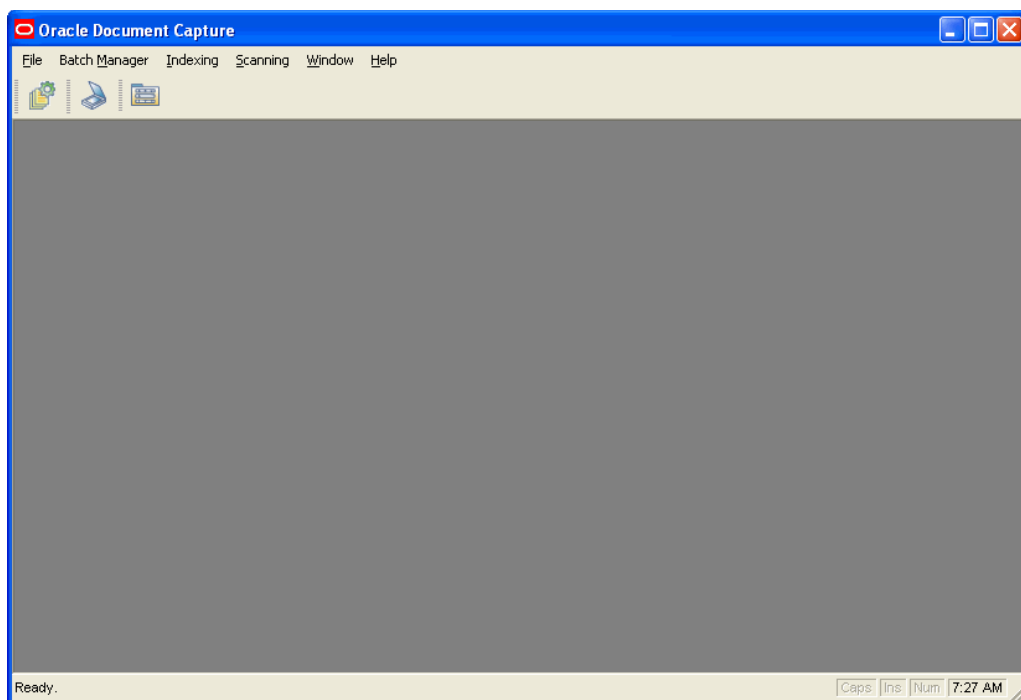



Element	Description
User Name	Enter the user name assigned to you by a Capture administrator. Capture user names are case insensitive.
Password	Enter the password assigned to you by a Capture administrator. Capture passwords are case insensitive.



A.2 Oracle Document Capture Screen

Use the Oracle Document Capture screen to start Scan, Index, and Batch Manager. The applications available to you depend on how Capture is installed.

Display this screen by starting Oracle Document Capture from the Start menu options. For information about menu commands, see the applicable screen. For example, for a description of batch manager commands, see "[Batch Manager Screen](#)" on page A-3.



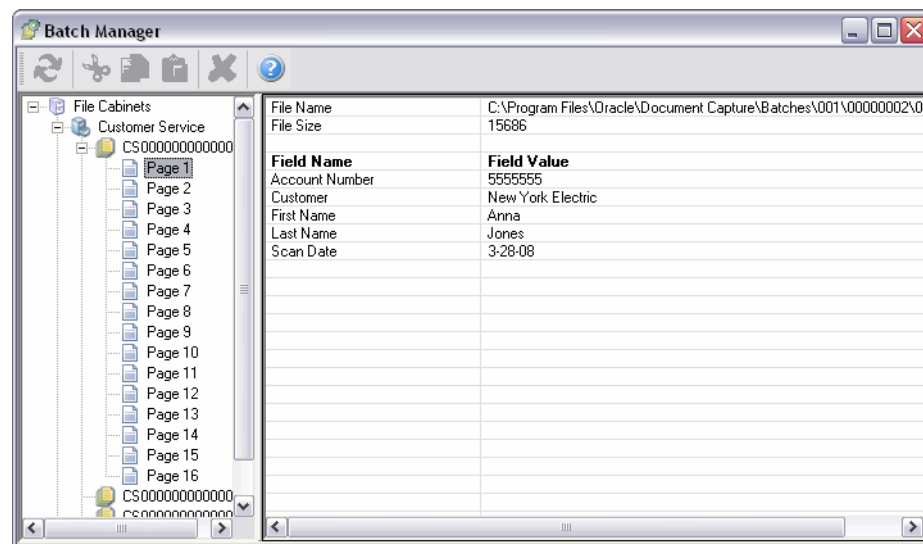
Button	Button Name	Description
	Batch Manager	Click to open Batch Manager.

Button	Button Name	Description
	Batch Scanning	Click to scan or edit previously scanned batches.
	Batch Indexing	Click to index, edit, and commit scanned batches.

A.3 Batch Manager Screen

Use this screen to display a tree view of batches on the network and manage them.






Display the Batch Manager by choosing **Open Batch Manager** from the Batch Manager menu.



Element	Description
File Cabinets	Lists file cabinets to which you have access. Select a file cabinet in the side pane and click its plus (+) sign to view information about its batches in the main pane.
Batches	Lists batches for the selected file cabinet. Select a batch in the side pane and click its plus (+) sign to view information about its pages in the main pane, or to cut, copy, or paste the batch.
Page	Lists information in the main pane about the page selected in the side pane.
Toolbar	See the Batch Manager Toolbar descriptions later in this section.

Batch Manager Toolbar

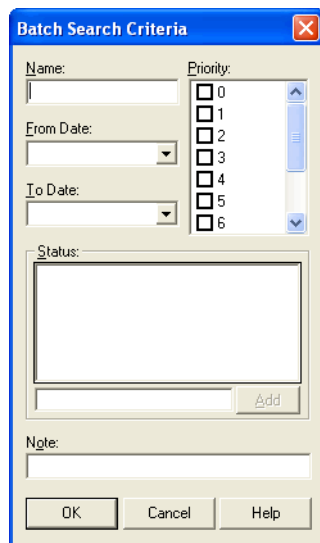
Each option in the toolbar is described below:

Toolbar Button	Button Name	Description
	Refresh Batch Pages	Display the list of batches on the network.
	Cut Batch	Delete the selected batch and place it on the clipboard for pasting to another file cabinet.
	Copy Batch	Place the selected batch on the clipboard for pasting to another file cabinet.
	Paste Batch	Paste the last batch you cut or copied to the selected file cabinet.
	Delete Batch	Remove the selected batch.

A.4 Batch Search Criteria Screen

Use the Batch Search Criteria screen during scanning or indexing to search for batches.

Display this screen by clicking **Search** in the Batch Scanning or Batch Indexing screen.



The Batch Search Criteria dialog box contains the following fields and controls:

- Name:** A text input field for entering the batch name.
- Priority:** A list box with checkboxes for values 0 through 6.
- From Date:** A date selection field.
- To Date:** A date selection field.
- Status:** A large text area for entering search criteria, with an **Add** button next to it.
- Ngte:** A text input field for entering a numeric greater-than-or-equal-to value.
- Buttons:** **OK**, **Cancel**, and **Help** buttons at the bottom.

Element	Description
Name	Enter the full name or the first part of the name and an * (asterisk) character to represent the remaining characters. For example, to display all batches with an INV prefix, type INV* in this field. You can use the wildcard characters listed in Table A-1 .

Element	Description
From Date, To Date	Use these fields to find batches created between a range of dates. Click the field and select a date from the calendar that appears. (Click the arrow buttons to change the month, and click a date to select it.) Specify a date in both fields to search a range or specify a date in one field only. To remove a date from the field, select it and click Delete.
Priority	Use this field to find batches with a selected priority or priorities. For example, check the Priority 1 and Priority 2 boxes to find all batches with a priority of 1 or 2. Note that batches that have not been assigned a priority have a priority of 0; you can search for batches with 0 priority.
Status, Add	Use these fields to find batches assigned one of the statuses you check. To add a status, enter it in the blank field and click Add.
Note	Use this field to find batches with notes containing the characters you specify. You do not need to include wildcard characters. For example, if a note contains the words <i>Need to re-scan documents</i> , entering <i>Re-scan</i> in this field will find the batch. Note that searches are case insensitive.

Table A-1 Wildcard Characters For Batch Name Search

Wildcard	Description	Example (batches named SCAN1, SCAN2 and SKAN9)
*	Represents one or more characters or numbers	Entering SCAN* finds SCAN1 and SCAN2.
?	Represents any single character	Entering S?AN* finds SCAN1, SCAN2 and SKAN9.
#	Represents any single number	Entering SCAN# finds SCAN1 and SCAN2.
[]	Represents a single character within a string	Entering SCAN[1-9] finds SCAN1 and SCAN2.

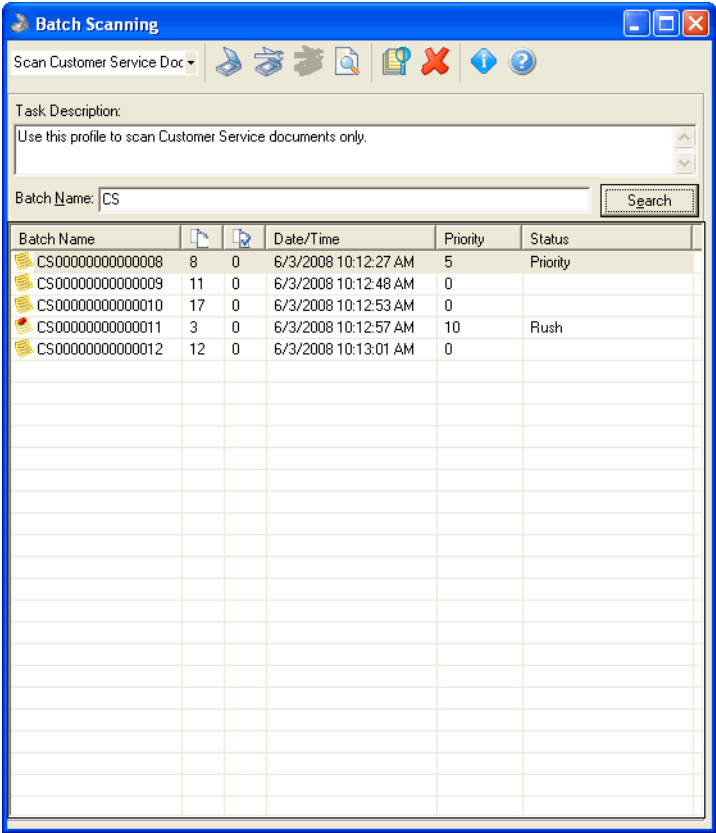
Note: The way in which the Capture administrator configured the index profile may affect searching. For example, only batches with a certain prefix, status, priority, or age range may be displayed.

Note: Only batches that meet ALL search criteria you apply are displayed. For example, if you enter a batch prefix and a priority of 10, only batches with the specified batch prefix AND the specified priority are displayed. However, selecting multiple settings within a search option is different. For example, if you check 1, 2 and 3 in the Priority field, batches with an assigned priority of 1, 2 OR 3 will be displayed, provided they meet any other search criteria you apply.

A.5 Batch Scanning Screen

Use the Batch Scanning screen to start scanning or to review previously scanned batches.

Display this screen by clicking the **Batch Scanning** toolbar button in the Oracle Document Capture screen.










Element	Description
Scan Profile	Select a profile to use for scanning or to view batches scanned using the profile.
Toolbar	See the Batch Scanning Screen Toolbar descriptions later in this section.
Task Description	If included, displays directions for scanning using the selected scan profile.

Element	Description
Batch Name	<p>After you select a scan profile, letters (a batch prefix) may appear in this field or it may be blank.</p> <p>If a prefix appears, this means that Capture will automatically name any batch you scan using this profile. To create names, Capture combines the prefix with a number that increments by one with each new batch. For example, suppose you are scanning groups of invoices, and the letters INV appear as the prefix. As you scan, Capture would automatically name the first batch INV00000000000001, the second batch INV00000000000002, the third batch INV00000000000003, and so on.</p> <p>If a prefix did not appear, enter a name that describes the papers you are scanning. You can type up to sixteen letters and/or numbers.</p> <p>NOTE: You may be able to name a batch yourself, even if a prefix displayed in the Batch Name field when you selected the scan profile. When you name batches yourself, however, Capture uses only the name you enter, and does not combine it with a number, so you will have to type a unique name for each batch. If, at any point, you want Capture to return to automatically assigning batch names, select the scan profile again, and Capture starts naming batches where it left off.</p>
Batch Table	Lists scanned batches. This table may be blank until you search for batches.
Search	Search for batches using search criteria you specify.
Pause After Every Page	Select this field to pause while scanning a batch. (This option is available only when using Scan for Adrenaline.) See " Pausing While Scanning " on page 2-4.

Batch Scanning Screen Toolbar

Each option in the toolbar is described below:

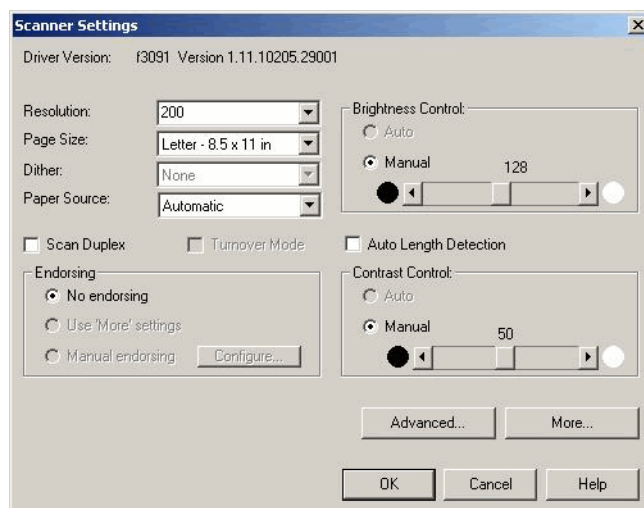
Toolbar Button	Button Name	Description
	Begin Scanning	Begin scanning or importing using the selected scan profile.
	Scanner Settings	View and, if needed, change scanner settings. Scanner settings you change remain until you select a profile. If you want the new settings to be permanent, ask the Capture administrator to modify the scan profile.
	Advanced Scanner Settings	View, and if needed, change advanced scanner settings. Advanced settings are specific to the selected scanner.
	Scan Preview	Test scanner settings and image quality. When you click this button, Scan scans and displays one page without saving the batch.
	Review Batch	Open the batch in the Reviewing screen and display its first page. You can also double-click a batch to review it.

Toolbar Button	Button Name	Description
	Delete Batch	Delete one or more selected batches. (Hold down the Ctrl key to select multiple batches.)
	Scan Profile Information	Display details about the selected scan profile. Information includes: Scan Profile Name, Profile Author, Last Modified Date, Profile ID, Batch Prefix, File Cabinet, Auto Sequence (true if active for batch naming), and Sequence Number.

A.6 Scanner Settings Screen

Use the Scanner Settings screen to temporarily change a scanner's settings. If importing, use the [Import Settings Screen](#) that is displayed. (This screen is displayed when using a scan profile for Scan for ISIS. For Scan for Adrenaline settings, see "[Scanner Properties Screen](#)" on page A-10.) Settings you select remain until you select another profile, either the current profile or another one.

Display this screen by clicking the **Scanner Settings** toolbar button in the Batch Scanning screen.



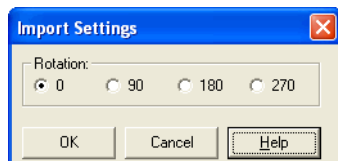
Element	Description
Resolution	Select the resolution at which you want images scanned when this profile is used. The resolutions available depend on the selected scanner. Resolution is the fineness or coarseness, measured in dots per inch (dpi), of an image as it is scanned. A higher resolution results in a better image; however, more storage space is required for high resolution image files.
Page Size	Select the maximum page size of documents that will be scanned using this profile. Available page sizes depend on the selected scanner.
Dither	Dither is the process of simulating shades of gray by altering the size and arrangement of black pixels on an image.
Paper Source	Specify whether you want the scanner to scan via the Automatic Document Feeder (ADF) or the Flatbed (for scanners that have both).

Element	Description
Scan Duplex	Select this field to scan both the front and back sides of documents. Duplex scanning must be supported by the scanner.
Turnover Mode	When selected, you can scan a stack of pages (as many pages as the scanner's document feeder will hold). When the stack has finished scanning, you can then continue scanning additional front pages or reinsert the same stack after flipping it over, and scan the backs of the pages in the stack in reverse order. If not selected, stack turnover is not allowed; you can either continue scanning front sides or stop scanning. (Turnover Mode must be supported by the scanner.)
Auto Length Detection	This option is used to scan extra long images and is available only if your scanner supports long scanning.
Endorsing	If your scanner supports endorsing (imprinting of images), these options are available.
Brightness Control	Select Auto if you want the scanner to automatically adjust the brightness (lightness) of images during scanning. To specify a particular brightness setting, select Manual and select a value using the slider. The black circle indicates darker values and the white circle indicates lighter values. (The higher the value, the lighter the scanned images.)
Contrast Control	Contrast is the range between the lightest and darkest shades in an image. A high contrast image has more gray shades between black and white; a low contrast image has fewer gray shades. Contrast determines how many gray shades are scanned. Select Auto if you want the scanner to automatically adjust the contrast of images during scanning. To specify a particular contrast setting, select Manual and select a value using the slider. The black circle indicates high contrast values and the white circle indicates low contrast values. (The higher the value, the less contrast in the scanned images.)
Advanced, More	Display additional advanced options. Advanced settings are specific to the selected scanner.

A.7 Import Settings Screen

Use the Import Settings screen to temporarily change the rotation at which images are imported. (This screen is displayed when using a scan profile set for importing rather than scanning.) Settings you select remain until you select another profile, either the current profile or another one.

Display this screen by clicking the **Scanner Settings** toolbar button in the Batch Scanning screen.

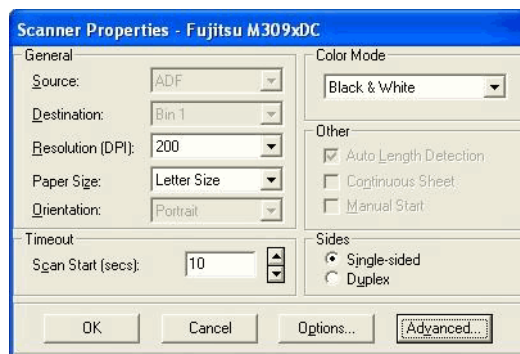


Element	Description
Rotation	Specify the rotation in degrees at which to import all images in a batch. You can choose 0 (the default, which provides no rotation), 90, 180 and 270.

A.8 Scanner Properties Screen

Use the Scanner Properties screen to temporarily change a scanner's settings. (This screen is displayed when using a scan profile for Scan for Adrenaline. For Scan for ISIS settings, see ["Scanner Settings Screen"](#) on page A-8.) Settings you select remain until you select any profile.

Display this screen by clicking the **Scanner Settings** toolbar button in the Batch Scanning screen.



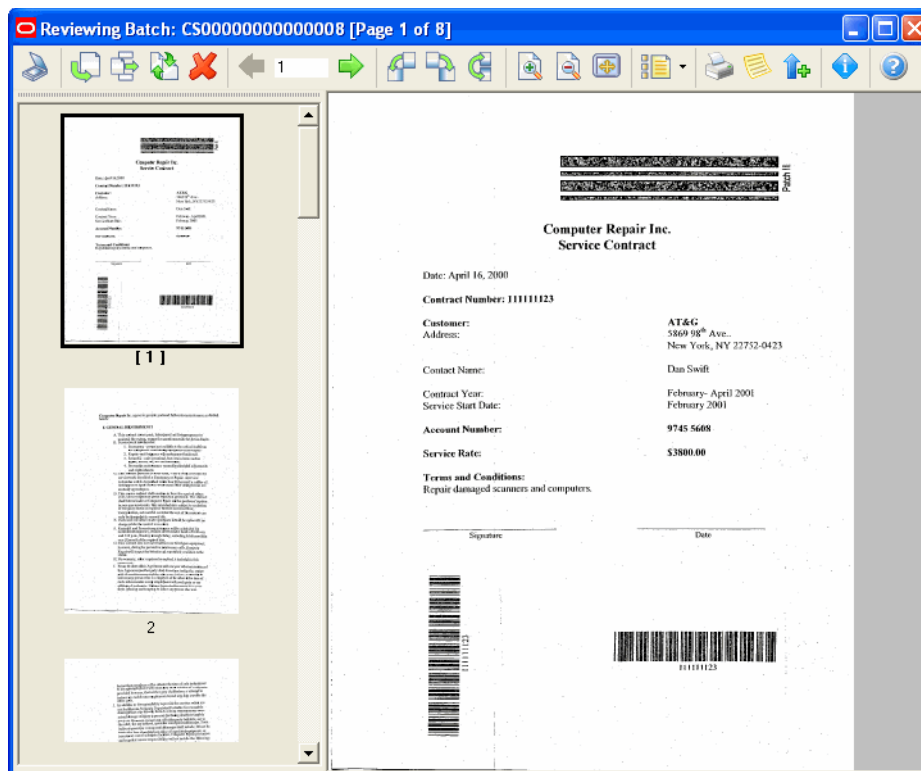
Element	Description
Source	Specify whether you would like the scanner to scan via the Automatic Document Feeder (ADF) or the Flatbed (for scanners that have both).
Destination	If your scanner supports this option, choose the output bin to which you want papers directed after scanning.
Resolution	Select the resolution at which you want images scanned when this profile is used. The resolutions available depend on the selected scanner. Resolution is the fineness or coarseness, measured in dots per inch (dpi), of an image as it is scanned. A higher resolution results in a better image; however, more storage space is required for high resolution image files.
Paper Size	Select the paper size of documents that will be scanned using this profile. Available paper sizes depend on the selected scanner.
Orientation	Select the orientation of pages that will be scanned. You can choose Portrait or Landscape.
Time Out	The number of seconds to wait until beginning scanning the first page in the batch. For example, you might use this to allow time to adjust paper and feeder settings.
Color Mode	Select the mode in which you want pages scanned. You can choose Black & White (the default), Color, or Grayscale. Keep in mind that scanning using the Color and Grayscale modes creates images with a much larger file size than scanning using the Black & White mode.

Element	Description
Autolength Detection	This field, along with the Continuous Sheet field, is used to scan extra long images; the options are available only if your scanner supports long scanning. To scan extra long images, both fields must be checked, the width selected in the Paper Size field must match the width of the long paper to be scanned, and the Orientation field must be set to Portrait.
Continuous Sheet	(See the Autolength Detection field.)
Manual Start	Select this field to delay scanning until the scanner's start button is pressed. (This option requires that your scanner have a manual start button.)
Sides	Specify if you want pages scanned on one side (single-sided) or both the front and back sides (duplex). Duplex scanning must be supported by the scanner.
Options, Advanced	Display additional advanced options. Advanced settings are specific to the selected scanner.

A.9 Reviewing Batch Screen
















Use the Reviewing Batch screen to view and edit previously scanned batches.





Display this screen by selecting a batch to review in the Batch Scanning screen.



Reviewing Batch Toolbar

Each option in the toolbar is described below:

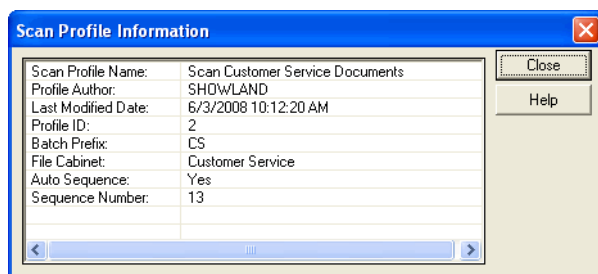
Toolbar Button	Button Name	Description
	Scanner Settings	Temporarily change scanner or import settings. Settings remain until you select another profile.
	Append Pages	Scan or import pages, adding them to the end of the batch.
	Insert Pages	Scan or import pages, inserting them after the selected page.
	Replace Page	Scan or import a page, replacing the selected page with it.
	Delete Page	Delete the selected page or pages. Hold down the Ctrl key to select multiple pages.
	Previous Page	Display the previous page.
	Go to Page	Display a page by typing its number and pressing Enter.
	Next Page	Display the next page.
	Rotate Left	Rotate the selected page 90 degrees to the left. Images are saved as rotated. Hold down the Ctrl key to select and rotate multiple images.
	Rotate Right	Rotate the selected page 90 degrees to the right. Images are saved as rotated. Hold down the Ctrl key to select and rotate multiple images.
	Flip Image	Rotate the selected page 180 degrees to the left. Images are saved as rotated. Hold down the Ctrl key to select and rotate multiple images.
	Zoom In	Enlarge the selected image's display. Click repeatedly to further zoom in.
	Zoom Out	Reduce the selected image's display. Click repeatedly to further zoom out.
	Fit to Window	Display the entire selected image in the viewer.
	View	Change how pages and thumbnails are displayed. Click the down arrow to choose between displaying thumbnail images only, pages only, or thumbnails and pages. Click the button to switch between the three choices.

Toolbar Button	Button Name	Description
	Print Page	Print the selected page using current printer settings.
	Edit Batch Note	Add, edit, or delete a note for the batch. The button displays a push pin when a note is attached to the batch.
	Edit Batch Status and Priority	Assign a priority number to the batch from 0 to 10 (where 10 is highest priority), or select or enter a status for the batch.
	Page Information	View details about the selected page, such as its batch, file name, file cabinet, and size.

A.10 Scan Profile Information Screen

Use the Scan Profile Information screen to view information about a selected scan profile.

Display this screen by selecting a scan profile in the Batch Scanning screen and clicking the **Scan Profile Information** button.

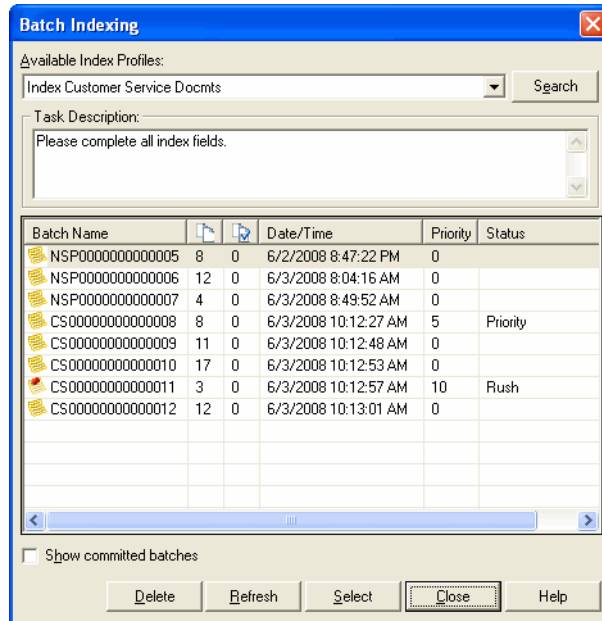


Element	Description
Scan Profile Name	Displays the name of the selected scan profile.
Profile Author	Displays the user name of the administrator who created the profile.
Last Modified Date	Displays the date on which the scan profile was last edited.
Profile ID	Displays the ID number assigned to the scan profile by Capture.
Batch Prefix	Displays the batch prefix used when naming batches (if any).
File Cabinet	Displays the file cabinet assigned to the scan profile.
Auto Sequence	Displays Yes if batches are named using an auto-sequence number or No if users assign batch names.
Sequence Number	Displays the next sequence number to be used in naming a batch. Displays n/a if auto sequencing is inactive.

A.11 Batch Indexing Screen

Use the Batch Indexing screen to select scanned batches for indexing, editing, and committing.

Display this screen by clicking the Batch Indexing toolbar button in the Oracle Document Capture screen.



Element	Description
Available Index Profiles	Select a profile to use for indexing.
Search	Click to search for batches using search settings you specify.
Task Description	Displays directions for indexing using the selected index profile.
Batch List	Lists batches scanned using the selected index profile. The list may be limited to those found using search options.
Show committed batches	Selecting this option adds to the list those batches marked for committing that have not been committed yet as part of a scheduled job by the Commit Server. The <i>Administrator's Guide for Oracle Document Capture</i> provides detailed information about Commit Server.
Delete	Delete one or more selected index profiles. Hold down the Ctrl key to select multiple batches.
Refresh	Update the list of batches.
Select	Display the batch selected in the batch list in the Indexing screen.

A.12 Indexing Screen

Use the Indexing screen to index and edit scanned batches.

Display this screen by selecting a batch to index in the Batch Indexing screen.






The screenshot shows a software window titled "Indexing Batch [NSP0000000000007] Page 1 of 4". On the left is a form with fields for "Account Number:", "Company:", "Doc Type:", and "Scan Date:". The main area displays a scanned document titled "Computer Repair Inc. Service Contract". The document includes the following information:











- Date: April 16, 2000
- Contract Number: 11111123
- Customer: AT&G; 5869 98th Ave., New York, NY 22752-0423
- Contact Name: Dan Swift
- Contract Year: February-April 2001
- Service Start Date: February 2001
- Account Number: 9745 5608
- Service Rate: \$3800.00
- Terms and Conditions: Repair damaged scanners and computers.











At the bottom of the document, there are two barcode areas, one on the left and one on the right, both labeled with the contract number 11111123. There are also lines for "Signature" and "Date".

Indexing Screen Toolbar

Each option in the toolbar is described below:

Toolbar Button	Button Name	Description
	Toggle Layout	Move the index fields to the right side of the screen and the viewer to the left, or vice versa.
	Database Lookup	Search an external database based on the field in which the cursor is positioned. If you entered characters to search for in the field before clicking the button, Index searches the database and displays values that match in a hit list; you select the value you want, and it is inserted into the field. This button is active when a database lookup is available for the selected index field.
	Previous Page	Display the document's previous page in the viewer.
	Go to Page	Display a specific page by entering its number in this field and pressing Enter.
	Next Page	Display the document's next page in the viewer.

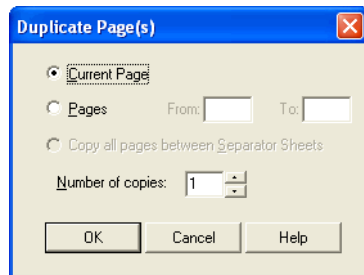
Toolbar Button	Button Name	Description
	Rotate Left	Rotate the image 90 degrees counterclockwise. Rotated images are saved that way within the batch.
	Rotate Right	Rotate the image 90 degrees clockwise. Rotated images are saved that way within the batch.
	Flip	Rotate the image 180 degrees. Rotated images are saved that way within the batch.
	Zoom In	Enlarge the selected image's display. Click repeatedly to further zoom in.
	Zoom Out	Reduce the selected image's display. Click repeatedly to further zoom out.
	Fit to Window	Display the entire selected image in the viewer.
	Toggle Zone Display	Turn zone display on or off. If zones are configured for the index profile, a turquoise box is displayed on the image when an index field is selected, to highlight the area. For example, a zone might highlight an area showing an invoice number so you can easily find it and type it in the current field. If you zoom in when zones are in effect, Index zooms in on the zone area, and saves the zoom setting. If the OCR option is available, characters from the zone might be automatically entered in the current field, leaving you to verify that they are correct.
	View Mode	<p>Use this button to change how images are displayed in the Indexing Screen. Click the button's arrow to select a different view, or click the button repeatedly to switch between the view options.</p> <ul style="list-style-type: none"> Choose Thumbnail View to view thumbnail images only. From the thumbnail view, double-click a thumbnail to display its page view. Choose One Page View to view a selected page only. Choose Page and Thumbnail View to view thumbnails and batch pages. A bold outline highlights the selected thumbnail.
	Delete Pages	Delete pages from the batch. In the Delete Pages Screen that displays, delete the selected page or enter page numbers. (Specify a range using a dash and separate numbers with a comma.)
	Duplicate Pages	<p>Copy one or more pages and paste them directly after the copied pages. For example, if indexing insurance forms, you might have policy pages needing to be indexed to different accounts.</p> <p>In the Duplicate Pages Screen that displays, specify the pages to duplicate (the current page, a range of pages, or all pages between any separator sheets surrounding the current page) and the number of copies to paste.</p>

Toolbar Button	Button Name	Description
	Commit	Send the selected batch for commit processing.
	Print	Send the currently displayed image to the printer.
	Copy Page Indexes	Copy the selected page's index values, for pasting to another page.
	Paste Page Indexes	Paste previously copied index values to the selected page.
	Apply Values to Remaining Pages	Apply the current page's index values to all pages after it. (Index values on images before the current image are not affected.) You can also select this command after clearing index values to clear all values from remaining pages.
	Clear All Indexes	Start over indexing the selected image, clearing out all of its index fields.
	Find	Search for images that contain a specified index value or that have no index entries. In the Find Screen that displays, enter the value to search for or choose Next Un-Indexed Page . Press F3 to search for the next instance of the search values you entered.
	Edit Batch Note	Enter, edit, or delete a note for the batch in the note window that displays.
	Edit Batch Status and Priority	Assign or change a batch's status and priority. From the Batch Status options displayed, enter or select a number between 0 and 10 in the Priority field (where 10 is the highest priority), and enter or select a status in the Status field.
	Page Information	Display information about the selected page. The information remains on the screen, allowing you to monitor information as the page changes. Information includes: Batch Name, Batch ID, File Cabinet Name, File Cabinet ID, File Name, File Size, Include in Document (false if page detected as separator page and profile set to discard separator pages), Page Complete (true if page is fully indexed), and Page Number.

A.13 Duplicate Pages Screen

Use the Duplicate Pages screen to duplicate one or more pages and paste them directly after the copied pages.

Display this screen by clicking **Duplicate Pages** on the toolbar in the Indexing screen.

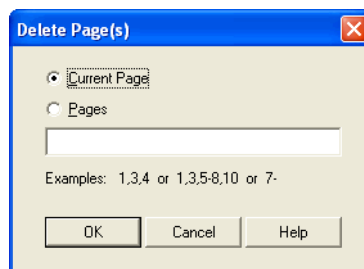


Element	Description
Current Page	Select to duplicate the current page only.
Pages, From, To	Select Pages to duplicate pages whose numbers you specify in the From and To fields.
Copy all pages between Separator Sheets	Select to duplicate all pages between any separator sheets surrounding the current page. This option is available when separator sheets have been defined in the index profile.
Number of copies	Enter the number of copies you want pasted.

A.14 Delete Pages Screen

Use the Delete Pages screen to delete one or more pages from a batch.

Display this screen by clicking **Delete Pages** on the toolbar in the Indexing screen.



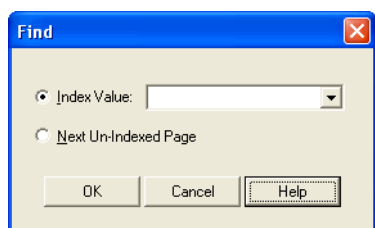
Element	Description
Current Page	Delete the current page.
Pages	List the numbers of pages to delete. Specify a range by separating page numbers with a dash or separate page numbers with a comma.

A.15 Find Screen

Use the Find screen during indexing to search for images containing a certain index value or to search for images without index entries.

Display this screen by clicking **Find** on the toolbar in the Indexing screen.

Note: Pressing F3 searches for the next instance of the search values you entered.



Element	Description
Index Value	<p>Enter the value you want to search for. For example, type an invoice number to search for a page with that index value.</p> <p>Index keeps track of the values you enter in this field, so you can select a previously entered value from the field. (Search values are deleted when you exit Capture.)</p>
Next Un-Indexed Page	<p>Select this option to search for pages without any index entries. This is especially useful if you selected a batch that was partially indexed but not committed, and you want to continue where you left off.</p>

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Nuance™ OCR © 1994-2008 Nuance Communications, Inc., All rights reserved.

Portions Copyright © EMC Corporation and their licensors.

U.S. Patent Nos. 6,094,505, 5,768,416, 5,625,465, 5,369,508 and 5,258,855.

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