

**Oracle® Document Capture**

Administrator's Guide

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Administrator's Guide for Oracle Document Capture, Release 10gR3

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## A Copyright and Patent Notices

### Index



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# Preface

This guide contains information to administer the Oracle Document Capture suite of applications.

## Audience

This document is intended for those people identified in the organization who are responsible for administering the Oracle Document Capture applications.

## Conventions

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<b>boldface</b>	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.



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# Oracle Document Capture Overview

This guide describes how to administer Oracle Document Capture's suite of production-level document capture applications.

This section covers the following topics:

- ["About Oracle Document Capture"](#) on page 1-1
- ["About Scan"](#) on page 1-2
- ["About Index"](#) on page 1-13
- ["About the Servers"](#) on page 1-17

## 1.1 About Oracle Document Capture

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

- The *Scan* component allows users to scan and import pages into batches. Users scan images using settings administrators save in scan profiles. See ["About Scan"](#) on page 1-2.
- The *Index* component allows users to index batches of scanned images, by assigning values to them in index fields. Users index documents using settings administrators save in index profiles. See ["About Index"](#) on page 1-13.

After indexing batches, users commit them, which creates documents from the images and archives them so they can be accessed in the document management system. Documents are committed using the settings selected in their assigned *commit profile*. You create and assign commit profiles in Capture administration.

- In addition to commit profiles, administrators use the *Capture Administration* component as a centralized area for managing file cabinets, index fields, users, pick-lists, database lookups in Capture components. See ["Capture Administration Overview"](#) on page 2-1 for overview information.
- The *Commit Server*, *Recognition Server* and *Import Server* components provide expanded functionality for Oracle Document Capture, as described in ["About the Servers"](#) on page 1-17. For example, organizations that want to perform scheduled batch commit processing on a separate server use the Commit Server component.
- Use the *Batch Manager* component to view all Capture batches on the network.

Oracle Document Capture supports a Visual Basic for Applications (VBA) compatible programming language for writing and debugging macros. You can develop macros to customize the Capture products for your organization. See the *Developer's Guide for Oracle Document Capture* for information about developing macros.

## 1.2 About Scan

This section covers the following topics:

- "Scan for ISIS and Scan for Adrenaline" on page 1-2
- "About Scan Profiles" on page 1-2
- "Scanning Tips" on page 1-2
- "About Importing (Scanning From Disk)" on page 1-3
- "About Endorsing Scanned Documents" on page 1-3
- "About Image Processing in Scan for ISIS" on page 1-3
- "About Image Processing in Scan for Adrenaline" on page 1-8

### 1.2.1 Scan for ISIS and Scan for Adrenaline

Scan comes in two versions: *Scan for ISIS* (optimized for use with ISIS drivers) and *Scan for Adrenaline* (optimized for use with Kofax Adrenaline/VRS interfaces). Note that you can run one Scan version at a time. (To switch between them, run the SwitchScan.exe utility located in the Capture installation folder.)

### 1.2.2 About Scan Profiles

Batch scanning typically uses medium to high-speed scanners with automatic document feeders to scan paper into batches of 50 to 500 images.

A scan profile contains all the scanning settings you want used when users scan particular batches. It identifies how batches will be named, the scanner, scanner settings, and image processing options to be used.

You may have one or many scan profiles. The number of file cabinets and the different document types scanned typically determines the number of scan profiles. (At least one scan profile is required to begin scanning with Scan.)

A profile is configured to work with one type of scanner. If a user connects a different scanner to his or her system, he or she will need to choose a different profile configured for that particular scanner or an administrator will need to edit the scan profile to use the new scanner.

In general, set your scanner settings so they accommodate most of the documents being scanned using the selected scan profile. Keep in mind that users can override a profile's scanner settings without changing the profile, then select the profile again at any time to reload the default profile settings.

### 1.2.3 Scanning Tips

This section provide general tips for optimizing scanning using Scan for ISIS or Scan for Adrenaline.

- For ease of use, set the scan profile to automatically name batches for users as they create new batches. You supply a prefix for the profile and select the Auto Sequence option. As users create each batch, Scan names them by appending a sequence number to the prefix. For example, enter a prefix of *Corr* (for Correspondence) and Scan will create batches named Corr00000000001, Corr00000000002, Corr00000000003, and so on.
- Use image processing settings to reduce the number of images that need to be re-scanned. Image processing settings automatically clarify images and increase

their legibility. See "[About Image Processing in Scan for ISIS](#)" on page 1-3 or "[About Image Processing in Scan for Adrenaline](#)" on page 1-8.

For example, if you intend to OCR areas on images after scanning and the scanner produces images with a black border, turn on deskewing, black border removal and cropping. These image processing settings will help ensure that images are consistently aligned for better OCR results.

- You may want to set a 90 degree rotation in the scan profile, and instruct users to scan papers in landscape mode. (See "[Rotating and Scaling](#)" on page 1-8 for details about rotating images.) This increases throughput, since pages are scanned more quickly in landscape mode. Note that users can also rotate images on a page-by-page basis when reviewing batches. Setting the orientation in the scan profile, however, affects all images in the batch while scanning.

## 1.2.4 About Importing (Scanning From Disk)

You may want to allow users to import images already saved as electronic files. For example, you might do this when converting microfiche or microfilm to TIFF images, or when images were scanned using another scanner not controlled by Scan.

When users begin scanning in the Batch Scanning screen using a scan profile set for importing, a standard file dialog box displays, prompting them to select files to import. After selecting one or more files, they are briefly displayed in the viewer as they are imported.

As an alternative, images and other electronic document files can be imported using Import Server. See "[About Import Server](#)" on page 1-20.

## 1.2.5 About Endorsing Scanned Documents

Endorsing (or imprinting) prints text on each sheet of paper as it is scanned. To use endorsing, you must have an endorsing-capable scanner. Some scanners support automatic endorsing, while others support manual endorsing or both. Check your scanner documentation to determine if endorsing is supported and if it is, where the text is printed on the paper.

Endorsing is helpful in preventing papers from being unintentionally scanned more than once, detecting double-feeds, and in indexing. You can set up endorsing to print such values as the batch name and daily sequence number, and users can read these values and use them in indexing. For example, in the insurance industry, the Julian date and daily sequence number can be used to assign a claim number.

## 1.2.6 About Image Processing in Scan for ISIS

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**Note:** Image processing settings apply to black and white images only.

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The Image Processing options in the Manage Scan Profiles screen allow you to select and configure processing filters to apply to images during scanning. For example, you might set up bar code detection, crop images to a smaller size, deskew (straighten) them, and remove noise (clean them up).

Note that filters you select are run in a default order, which you can change. When images are scanned, the selected filters are run in a recommended order. For example, you would not perform line removal before performing bar code recognition.

When selecting image processing settings, it is recommended that you test the profile with documents similar to ones you anticipate processing and fine tune each filter's settings until you find the best values for the documents, while balancing processing speed and image quality.

Scan for ISIS image processing filters include:

- ["Bar Code Detection"](#) on page 1-4
- ["Blank Page and Patch Code Detection"](#) on page 1-4
- ["Border, Halftone, and Hole Removal"](#) on page 1-5
- ["Cropping and Picking Rectangles"](#) on page 1-5
- ["Deskew"](#) on page 1-5
- ["Dilating and Eroding"](#) on page 1-6
- ["Smoothing and Inverting"](#) on page 1-6
- ["Line Editing"](#) on page 1-7
- ["Noise Removal"](#) on page 1-7
- ["Rotating and Scaling"](#) on page 1-8

### 1.2.6.1 Bar Code Detection

Use the Bar Code Detection options to specify whether bar codes are detected during scanning and how they are decoded. The bar code filter can detect a virtually unlimited number of bar codes on a page.



### 1.2.6.2 Blank Page and Patch Code Detection

- Use the *Blank Page Detection* filter to detect and delete blank pages.
- Use the *Patch Code Detection* filter to detect and decode patch codes on scanned images. A patch code is a pattern of horizontal black bars separated by spaces and is typically placed near the leading edge of a paper document. It can be used to separate documents or to stop the scanner. Scan for ISIS can detect Type II, III and T patch codes.

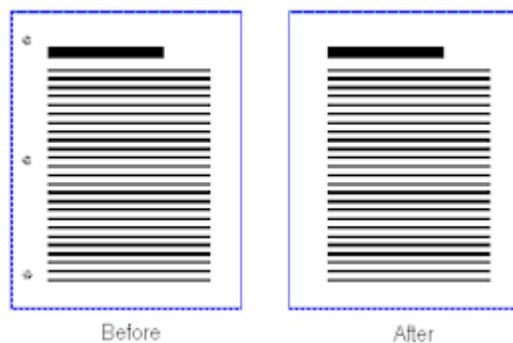


### 1.2.6.3 Border, Halftone, and Hole Removal

- Use the *Border Removal* filter to remove black edges that sometimes appear around an image after scanning. The filter removes borders around image edges by changing them to white.
- Use the *Halftone Removal* filter to remove a background or graphics object from an image.

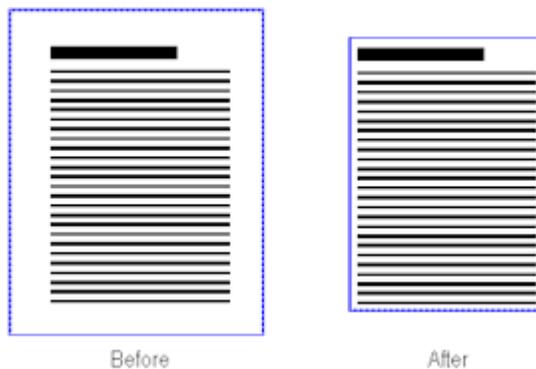


- Use the *Hole Removal* filter to remove punch holes from image edges. The filter looks for objects that resemble punch holes around the edges of the image. It does not remove objects that resemble punch holes from other areas of the image.



### 1.2.6.4 Cropping and Picking Rectangles

Use the *Cropping/Picking Rectangle* filter to set image margins and to add or remove white space around image edges.

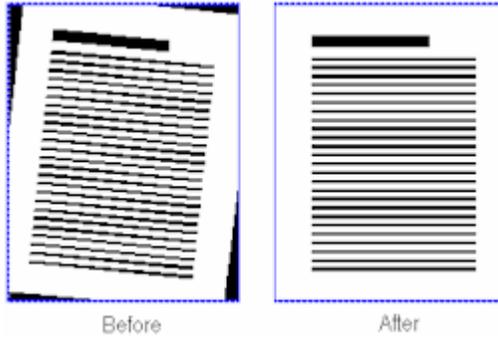


### 1.2.6.5 Deskew

Use the Deskew filter to straighten skewed images. When documents are fed into a scanner, fax machine or copier, they sometimes get skewed. This filter detects the

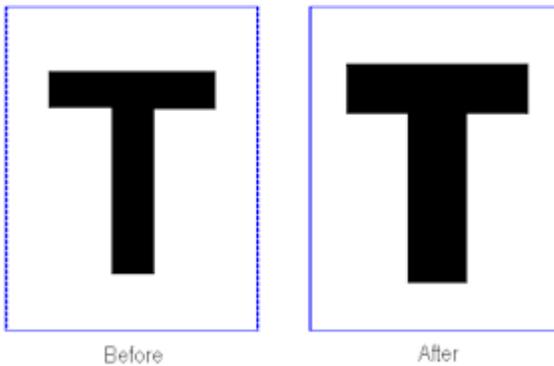
skew angle (measured between the image's edge and the horizontal or vertical axis) and then rotates the image to correct it. Deskewing can improve an image's legibility and OCR results.

You can also use the Deskew filter to rotate images a specified number of degrees (from -44.9 degrees to +44.9 degrees). You might do this after detecting the skew angle yourself or to rotate the image to a certain degree.

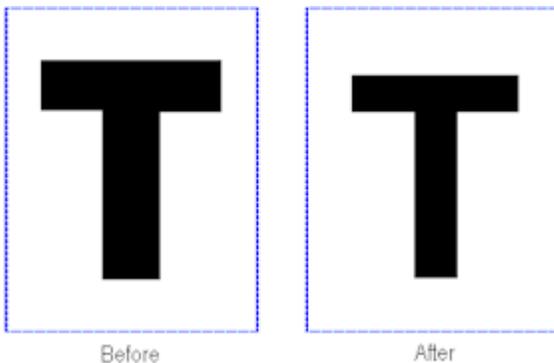


### 1.2.6.6 Dilating and Eroding

- Use the *Dilate* filter to expand the area of black objects on images. Dilating can improve image quality and text legibility. Note that using this filter increases file size.



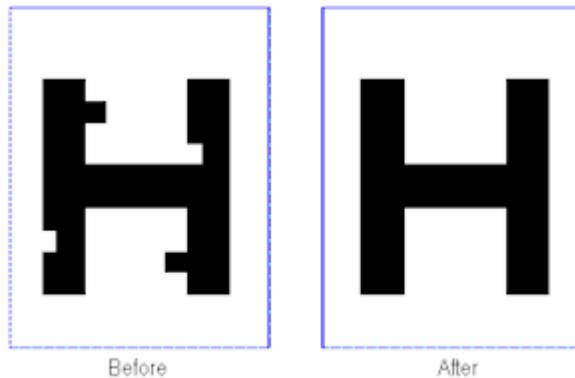
- Use the *Erode* filter to trim the area of black objects. Using this filter reduces file size, but may also reduce image detail.



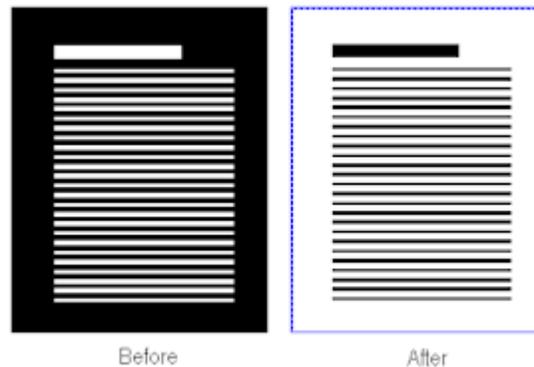
### 1.2.6.7 Smoothing and Inverting

- Use the *Smoothing* filter to delete bumps and spurs from text characters or objects on images. The filter looks for pixels surrounded by five or six connected pixels of

the opposite color, and inverts the center pixel, based on the filter mode being used. Smoothing can improve legibility and reduce file size without losing a lot of image detail.



- Use the *Inverting* filter to invert images. The filter changes white pixels to black and black pixels to white.



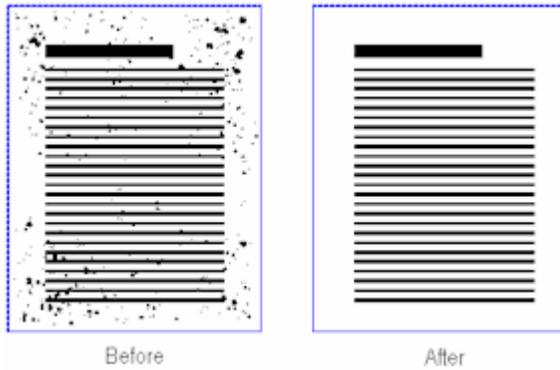
### 1.2.6.8 Line Editing

Use the *Line Editing* filter to remove and optionally redraw straight lines on form-type images. Removing lines can reduce file size and improve OCR results.



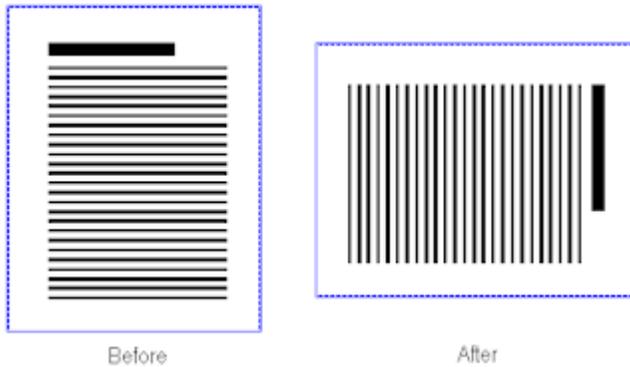
### 1.2.6.9 Noise Removal

Use the *Noise Removal* filter to detect and remove noise. You do this by defining the maximum space an object can occupy within a specified area in order to be considered noise.



### 1.2.6.10 Rotating and Scaling

- Use the *Rotating* filter to rotate images in 90 degree increments, clockwise or counterclockwise.



- Use the *Scaling* filter to resize images to a specified width and height, while retaining their aspect ratio.



## 1.2.7 About Image Processing in Scan for Adrenaline

Scan for Adrenaline provides an Image Processing tab for selecting precise settings to make images easier to read, reduce file sizes, and improve processing. This section describes image processing options you can select for scan profiles.

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**Note:** Image processing options require a version of Kofax Adrenaline engine that supports image processing.

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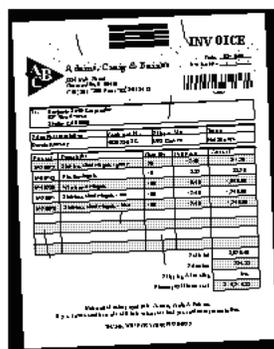
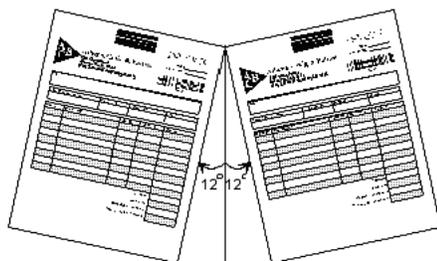
Scan for Adrenaline image processing filters include:

- "Deskew" on page 1-9
- "Despeckle" on page 1-9
- "Image Filters" on page 1-10
- "Line Removal" on page 1-10
- "Patch Code" on page 1-11
- "Deshade" on page 1-11
- "Streak Removal" on page 1-11
- "Black Border" on page 1-12
- "Bar Codes" on page 1-13

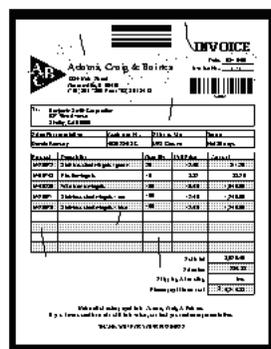
### 1.2.7.1 Deskew

Deskew is the process of straightening a crooked or skewed image. Skewing can happen during the normal process of scanning due to the mechanical feeding action of the scanner. Deskewing is useful for making images more readable and improving post-processing operations. See "Deskew" on page 11-23.

The deskew feature can calculate and correct skew angles up to 12 degrees. The deskew value is in increments of 0.1 degrees.



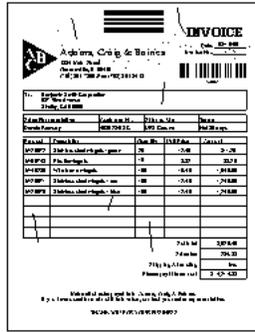
Before



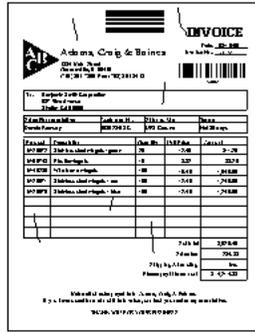
After

### 1.2.7.2 Despeckle

Despeckling removes unwanted dots or speckles on an image. Speckles are groups of black pixels surrounded by white pixels (or white pixels surrounded by black pixels). Removing speckles provides a cleaner image and helps reduce compressed file sizes. See "Despeckle" on page 11-24.



Before



After

### 1.2.7.3 Image Filters

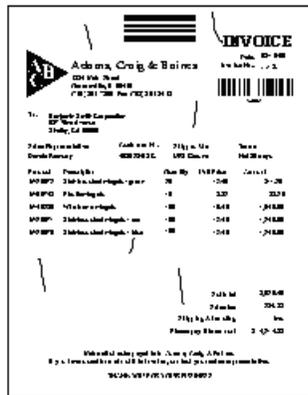
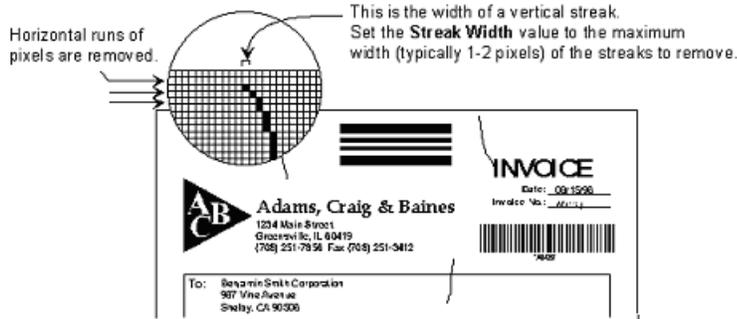
Use Image filters to enhance line edges, smooth characters, and remove background noise on an image. See ["Image Filters"](#) on page 11-25.



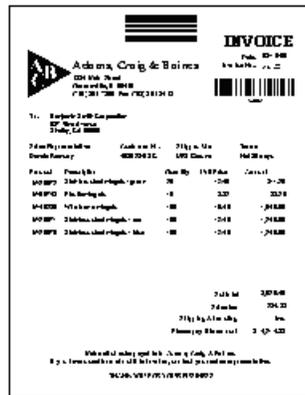
### 1.2.7.4 Line Removal

If your images contain horizontal and/or vertical lines (for example, a medical claims form), you can remove them with the line removal feature. This feature can also repair text that intersects the lines that are removed. Removing lines and repairing characters improves the readability of the image for OCR processing. See ["Line Removal"](#) on page 11-29.





Before

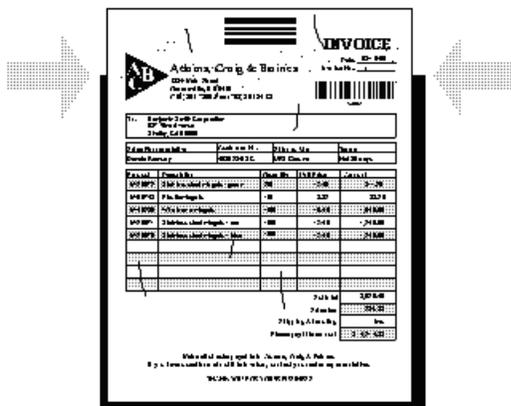


After

### 1.2.7.8 Black Border

Black borders often appear on images as a result of using a scanner with a black belt or drum. See "Black Border" on page 11-38.

To remove a black border, the software starts at the outer left and right edges of the image and works inward turning black pixels into white until it detects a white pixel.



### 1.2.7.9 Bar Codes

Use the Bar Code options to detect bar codes on an image and convert them to their ASCII equivalents. See ["Bar Codes Properties"](#) on page 11-39.

## 1.3 About Index

This section covers the following topics:

- ["How Indexing Changes Images Into Documents"](#) on page 1-13
- ["About Index Profiles"](#) on page 1-13
- ["Indexing Tips"](#) on page 1-14
- ["About Index Field Properties"](#) on page 1-14
- ["About Indexing Using Separator Sheets"](#) on page 1-16
- ["About Indexing With Zones and OCR"](#) on page 1-17

### 1.3.1 How Indexing Changes Images Into Documents

Users index images by assigning one or more values to them in index fields. During commit, Index takes all images with the same index values and merges them into a document. When it encounters a different value for any of these fields during the commit process, it creates a new document. After images are committed, they are removed from the batch and no longer available.

The following indexing guidelines apply.

- A document is created from more than one image when all of the index field values among the images are exactly the same. If one image has three fields filled in and another image has two fields filled in with the same values, two documents are created.
- An image is indexed if there is a value in any of its index fields.
- Unindexed images (those without any fields filled in) remain in the batch when users commit it.
- Required fields must be filled in before their images can be committed. Required fields have an asterisk (\*) in front of their name in the indexing screen to users.

### 1.3.2 About Index Profiles

An index profile contains all the indexing settings you want used when users index particular batches. Through its settings, you:

- identify the file cabinet from which scanned batches are indexed and into which they are stored,
- identify fields to be indexed and indexing methods to be used,
- can map an external database from which users can look up index values,
- can identify how separator sheets are used,
- can set up certain fields such as a scan date to be autopopulated,
- can set up image highlighting using the Zone Editor.

Unlike scan profiles, index profiles are typically stored in a central location on the network. This allows many indexing users to use the same index profile.

### 1.3.3 Indexing Tips

This section provide general tips for optimizing indexing.

- When scanning, separate your single and multiple page documents into different batch types and create two index profiles that can be optimized for each document type. You can then use separator sheets in the multiple page documents to index them more quickly.
- The Sticky Fields feature is useful in batches where you have a mixture of single page and multiple page documents. When a field is sticky, the index field value a user enters is automatically copied to the same field on the next page when paging through the batch. (Sticky fields also work when paging backwards in a batch.) If you set all fields as sticky, index values are automatically copied onto the new page; if the user determines that the new page does not belong to the same document, he or she simply enters new values and that page becomes a new document. For details about setting sticky fields and specifying when a field is sticky, see "[Sticky Index Fields](#)" on page 1-15.
- The built-in database lookup feature is very powerful as it can eliminate data entry of certain fields and ensure data integrity. For example, in an accounts payable application, you could data enter the purchase order number and perform a database lookup to retrieve the vendor number, vendor name and PO date from your accounting system.
- Use pick-lists whenever you want to standardize specific field values. For example, you might create a pick-list of ten document types and require that a document be one of those ten types by locking the field.
- Order your indexing fields to coincide with the way the indexing user will read the image. This allows the indexing user to process an image naturally.
- When the Scroll Lock key is present and active on users' keyboards, each time they press the Tab key, the index fields shift up and the topmost field is hidden from view. (Pressing Shift-Tab shifts index fields down.)
- If you are processing images that are form-based, take advantage of the auto-highlighting feature by defining field zones in the Zone Editor. This forces Index to automatically highlight an area on the image, allowing the user to see and process the field quicker. Use this feature in conjunction with the SCROLL LOCK key to reduce end-user eye movement. Reduction in eye movement can help to minimize indexing user stress and fatigue.
- If needed, use the input format feature to ensure that data users enter is formatted consistently. When the user moves to another index field, Capture changes the data if needed to match a selected format.

### 1.3.4 About Index Field Properties

You can apply special field properties to index fields. For example, applying a pick-list to an index field provides a standard list from which users select. Special field properties include:

- "[Pick-list Index Fields](#)" on page 1-15
- "[Linked Pick-list Index Fields](#)" on page 1-15
- "[Index Fields With Input Masks](#)" on page 1-15
- "[Index Fields That Format Input Values](#)" on page 1-15
- "[Applying Bar Code Values to Index Fields](#)" on page 1-15

- ["Auto Populating Index Fields"](#) on page 1-15
- ["Sticky Index Fields"](#) on page 1-15
- ["Populating Index Fields From a Database"](#) on page 1-16

#### **1.3.4.1 Pick-list Index Fields**

A pick-list provides users with two or more values from which to choose when indexing documents. You create pick-lists in Capture Administration, then select them in the index profile.

#### **1.3.4.2 Linked Pick-list Index Fields**

In a parent/child relationship, a parent field is linked to two or more child pick-lists, one of which is displayed after the user makes a selection in the parent field. For example, a parent pick-list might list departments and its child pick-list document types; if the user chooses Sales from the parent pick-list, the child pick-list might list document types specific to Sales. You create pick-lists and their relationship profiles in Capture Administration, then select the relationship profile and pick-lists in the index profile.

#### **1.3.4.3 Index Fields With Input Masks**

A mask is a filter that controls what users can enter into the index field. For example, a mask might allow users to type numbers but not letters. If the user types a character that does not conform to the mask, Index does not accept it.

#### **1.3.4.4 Index Fields That Format Input Values**

The Input Format option provides a way to ensure that data entered by users matches a certain format. When the user moves to another index field, Capture changes the data, if needed, to match the specified input format.

#### **1.3.4.5 Applying Bar Code Values to Index Fields**

You can configure a scan profile to detect bar codes when images are scanned, and then an index profile to automatically apply the detected value to an index field. If the page contains more than one bar code, Index displays their values in a pick-list to the indexing user.

As an alternative to indexing, images can also be indexed using Recognition Server. This component automates indexing through bar code recognition technology.

#### **1.3.4.6 Auto Populating Index Fields**

Use the Auto Populate tab to set up automatically indexed fields. You can configure Index to automatically fill (populate) selected index fields with certain values. For example, you might want to automatically populate a date field with the batch's scan date instead of having users type it in. Or, you might want to provide a default value for a field that the user could change if needed.

#### **1.3.4.7 Sticky Index Fields**

When an index field is sticky, an indexing user specifies a value in an indexing field, moves to the next page and the value is automatically pasted into that indexing field (if blank) on each subsequent page the user displays.

Sticky fields can significantly speed up indexing. In a common scenario, all fields are set as sticky; a user enters values on the document's first page, then quickly views each remaining document page as values are automatically applied.

- The sticky field on the destination page *must* be blank.
- Sticky fields are sticky only when users navigate using the Next Page or Previous Page toolbar buttons, and not when using thumbnails or typing page numbers in the Goto Page field.

To provide flexibility, a **When** option controls when the field is sticky. The choices are ordered from most restrictive to least:

- **All index fields blank** (the default; most restrictive): The field is sticky only when none of the destination page's fields contain values.
- **Page partially indexed**: The field is sticky only when the page is not considered fully indexed. For example, one or more index fields may contain values, but a required field may be missing.
- **Always** (least restrictive): The field is sticky regardless of the page's other index field values.

#### **How Autopopulated Fields Affect Sticky Fields**

Because autopopulated fields can affect whether a page is considered indexed and therefore whether a field is sticky, an option titled **Allow autopopulate field(s) to index page** allows you to control this.

- When NOT selected (default), autopopulated fields are considered blank.
- When selected, autopopulated fields are considered indexed fields.

Note that, when the user moves to a destination page, sticky field logic is applied BEFORE values are autopopulated. So an autopopulated field affects the sticky field only if the autopopulated field previously had a value.

When **All index fields blank** is chosen in the Sticky When field, the Allow auto populated... field affects whether all fields are considered blank and consequently, whether the sticky field is sticky. When deselected, all fields are considered blank, so the field is sticky. When selected, the autopopulated field is considered indexed, all index fields are not blank, so the field is NOT sticky.

#### **1.3.4.8 Populating Index Fields From a Database**

A database lookup searches an external database for a value the user specifies and populates index fields from a matching database record. For example, users might perform a database lookup after entering an account number, and the remaining index fields would be populated from the matching database record.

You create a database lookup in Capture Administration, then select it in the index profile. For more information about database lookups, see "[About Database Lookups](#)" on page 2-5.

### **1.3.5 About Indexing Using Separator Sheets**

You can use separator sheets to determine where documents begin and end in a batch. Separator sheets speed up indexing: instead of viewing each page to determine if it belongs with the current document or is part of a new document, the user enters index values once for each field, applies those values to all pages in the document, and then quickly jumps to the start of the next document.

To index by separator sheet, batches must have been scanned using patch code or bar code detection in Scan.

When separator sheet indexing is enabled and the user selects the **File to Separator** command from the Batch menu, Index copies all index values from the current page to all pages between the separator sheets, then advances to the next document (separator sheet).

### 1.3.6 About Indexing With Zones and OCR

Index's zone feature allows you to highlight certain areas (zones) of an image with a **turquoise-colored box** to guide the user when indexing. Highlighting fields to be indexed in this way can increase user efficiency by reducing eyestrain and making fields easier to read. The zone feature is particularly useful when users are indexing forms.

You set up zones for an index profile using Index's Zone Editor. When indexing, users can click the Display Toggle Zone button on their toolbar to turn zones on or off.

To set up zones, you need an image file to use as a template. It is important that the resolution of this image is the same as the resolution that will be used at scan time.

You can configure Index to capture text in a zone and automatically enter it in a selected index field. If OCR is active for an index profile, users can also perform OCR on-the-fly: they right-click and drag an area on the image, and Index will capture its text and insert it in the selected field.

Important points about the OCR feature:

- You activate OCR for a zoned field by setting up the field's zone and turning on OCR by selecting the OCR button on the Zone Editor toolbar.
- OCR works well in conjunction with a macro that parses the text captured. This allows you to define a zone with padding around the text to capture, and then extract only the characters you want. For example, you might do this when capturing Social Security numbers, capturing a larger area, and then using a macro to filter out all characters except the Social Security number.
- If OCR is enabled for any field, users can perform OCR on-the-fly, even if that field is not enabled via a zone, and even if zone display is turned off. Users do this by rubber-banding an area on the image while holding down the right mouse button.
- Index performs zonal OCR on an image only if it is not indexed (does not contain values in its index fields). If you want Index to perform OCR on an indexed image (on all fields for which OCR has been defined), choose the OCR Zone(s) command from the Edit menu, or press F5.
- It is important that users verify OCR entries, since it can result in inaccurate values.

## 1.4 About the Servers

The server applications provide extended functionality for Oracle Document Capture. Designed to be run unattended, they perform scheduled batch jobs and automate processing in different ways.

The servers consist of:

- *Commit Server*, which performs scheduled batch commit processing on a separate server instead of on indexing users' workstations. See "[About Commit Server](#)" on page 1-18.
- *Recognition Server*, which automates indexing using bar code recognition technology. Based on bar code recognition results, it indexes and commits batches. See "[About Recognition Server](#)" on page 1-19.
- *Import Server*, which imports images and other electronic documents directly into Capture from sources such as email, FTP sites, network folders, list files, and fax providers. As images and electronic documents are imported, they are converted into Capture batches where they can be indexed using Index or Recognition Server and then committed. See "[About Import Server](#)" on page 1-20.

Each server can be run as a Windows service rather than an application. Running as a service allows starting or rebooting the server without logging in. For more information, see "[Guidelines For Running Servers as Services](#)" on page 12-56.

### **About Batch Jobs**

A *batch job* identifies the batches you want processed by the server when the job is run according to its schedule. It also contains settings specific to the server.

### **About Events and Scheduling**

An *event* is a schedule for processing a batch job, to be run once or at a certain frequency. For example, if you schedule a batch job to process every minute, the server checks every minute and begins processing if a batch is detected.

Use the Scheduler to create events, delete events, delete old log files and shut down the server.

### **Server Activities and Statistics**

Once processing begins, you can view up-to-the-minute statistics and server log messages in the server main screen. You can also set the server to send an email alert if an error occurs during processing.

In addition, each server audits certain activities and saves the information in the ecAudit table in the Capture batch database.

## **1.4.1 About Commit Server**

Using Commit Server frees up indexing users' workstations immediately after they click to commit a batch. It also provides scheduled processing during off-peak hours. For example, scanning and indexing might be done at a remote location during normal business hours, while commit processing is performed overnight and unattended from a central location.

To use Commit Server with a Capture component, the Use Commit Server option in that component must be enabled. (You can use Commit Server in Index, Recognition Server and Import Server.) For example, when an indexing user commits a batch with this option set, Index marks the batch as *ready to be committed*, and Commit Server commits it based on the batch job's schedule.

In Commit Server, a batch job identifies the batches to process. To process all file cabinets or each file cabinet without special settings, schedule processing without creating a batch job. Create a batch job to process batches in ways not provided by the default jobs. For example, you might create a batch job to group particular file cabinets together in a job, process only batches with a certain prefix or status, or sort batches for processing.

Scheduling allows you to prioritize processing. For example, your organization might have a Human Resources file cabinet that contains resume information (which can be processed any time) and retirement information (which is confidential and should be processed right away). You could create two jobs: a job called Resume that is scheduled to process only batches with an RES prefix every night at midnight, and a job called Retirement that is scheduled to run every minute and process only batches it finds with an RET prefix.

## 1.4.2 About Recognition Server

The most costly and time-consuming task of an ECM (electronic content management) system is document indexing, because it requires a large portion of staff and time resources. Software-based and requiring no expensive hardware, Recognition Server seamlessly files images into your content management system, dramatically reducing indexing time.

### How Recognition Server Works

- Documents are scanned in preparation for processing in one of several batch processing methods by Recognition Server.

Each batch can contain single page documents, one document only or multiple page documents. (See "[Batch Processing Methods](#)" on page 1-20.)

- In Recognition Server, administrators create batch jobs, which determine the batches to process and how to process them.

Recognition Server batch jobs contain all the settings to be used when batches are scanned, indexed, and committed. For example, batch jobs determine how images are separated into documents, how bar codes are read and assigned to index fields, and whether index values are assigned from an external database.

For example, the batch job might direct Recognition Server to look for batches assigned to the Mortgage file cabinet that start with a MORT prefix, scan the first image for a Code 39-type bar code, read an eight character value from the bar code, assign the value to an account number field, and file the image in the Mortgage file cabinet.

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**Note:** When setting up the batch job, you can instruct Recognition Server to wait a specified number of minutes before processing a batch to ensure that the scanning user has time to review the batch.

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**Note:** In addition to the extensive batch setting options provided, you can use VBA-compliant macros to customize Recognition Server functions. For example, if a bar code contains three values that are joined, you could use a macro to parse the values and correctly assign them to indexing fields.

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- Schedule an event for the batch job.

When Import Server detects a scheduled event that is due, it uses the batch job settings to read bar codes and index images into the proper file cabinets. Recognition Server commits images as soon as it finishes indexing them.

### 1.4.2.1 Batch Processing Methods

A key step in setting up a batch job is specifying how documents were arranged and scanned in batches, so Recognition Server knows how to process them.

Recognition Server provides three methods of processing batches. (All batches within the job must be arranged the same way.) Each batch can contain:

- **Single page documents:** Each image contains a bar code; Recognition Server uses this bar code to index the single image as a document.
- **One document only:** Typically, the first image contains a bar code used to index the entire batch as a single document. (Bar codes can be read from multiple pages.)
- **Multiple page documents:** Documents in the batch are separated by bar code or patch code, and a bar code on the first page of each document is used to index the document.

### 1.4.3 About Import Server

Import Server imports images and other electronic documents directly into Capture from a variety of sources. You can apply this server to such applications as:

- incoming faxes
- microfiche conversion
- multi-function copiers
- images scanned using third-party software
- documents sent as email attachments
- documents downloaded from an FTP server

#### How Import Server Works

- In Import Server, administrators create batch jobs of the following types, depending on files to be imported.
  - **Folder:** Import Server monitors an import folder and imports all files it finds with a specified file mask.
  - **List File:** Import Server monitors an import folder and also reads a list (text) file containing records that identify each image to import, and optionally, index values to be assigned to the image or values to be matched against a database.
  - **Castelle FaxPress Provider:** Import Server automatically imports incoming fax images from a FaxPress network appliance into Capture.
  - **Email Provider:** Import Server imports files attached to incoming email messages into Capture and optionally converts email messages to images.

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**Note:** The Import Server Email Provider does not support multiple servers monitoring the same inbox at the same time.

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- **Custom Provider:** Import Server uses a specified VBA-compatible macro to import images into Capture.
- **FTP Provider:** Import Server connects to an FTP Server and downloads files from a specified folder into Capture.

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**Note:** Depending on the providers selected during installation, some of the import providers may not be available.

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- Administrators select the batch job's settings.
  - Under Image Output options, specify if you want image and non-image files converted to a different format when imported.
  - On the provider-specific tab, select settings related to the selected import provider. For example, for a Folder batch job, specify when to create new batches, and, for a List File batch job, identify fields to be read from the list file.

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**Note:** In addition to the extensive batch setting options provided, you can incorporate VBA-compliant macros in a variety of ways to customize Import Server functions.

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- Schedule an event for the batch job.
 

When Import Server detects a scheduled event that is due, it uses the batch job's settings to import images into Capture batches. If you import images using a list file job, Capture can index and commit images into the proper file cabinets.

#### 1.4.3.1 How Import Server Names Batches

Import Server automatically names batches when creating them. The batch name consists of three parts:

- batch prefix (if specified)
- date (using the format mmddyy)
- elapsed time since midnight, expressed in hundredths of a second. This number is padded with zeros to make it seven digits. For example, for a file created exactly two seconds after midnight, the time portion of its name would be 0000200

A batch named AP0202080000200 was created in the AP file cabinet on February 2, 2008, exactly 2 seconds after midnight.

#### 1.4.3.2 How Import Server Converts Non-Images to Images

Import Server converts non-image documents during import using the Capture virtual print driver. After determining the document's native application based on its file extension, Import Server prints the electronic file using the native application, then intercepts the print output and converts it to an image. For example, if the file is a Microsoft Word document, Import Server launches Microsoft Word, instructs the application to print and converts the print output to images.

Occasionally, the native application generates a conflict in automated printing. For example, Internet Explorer displays a print dialog box that requires a response to continue. A solution is to automatically change the files' extension before conversion. To do this, configure extension renaming. For example, if you change the .HTM extension of Internet Explorer files to .DOC, Microsoft Word prints the files instead.

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**Note:** To test if a document file prints correctly with Import Server, right-click the file in Windows Explorer. If the Print option is available, select it to print the document. If the file prints without displaying a Print dialog box requiring user interaction, the document file type can be used with Import Server. If the Print option is not available, there is no print association with the selected document type.

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**Note:** To improve performance, you may want to start the application (for example, Microsoft Word) before running the Import Server. This may prevent the application from loading and unloading between file conversion. Whether or not an application unloads is dependent on the associated application.

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## Capture Administration Overview

This section covers the following topics:

- ["About Capture Administration Tasks"](#) on page 2-1
- ["About File Cabinets"](#) on page 2-1
- ["About Index Fields"](#) on page 2-2
- ["About Users in Capture"](#) on page 2-2
- ["About Managing Batches"](#) on page 2-3
- ["About Pick-lists"](#) on page 2-4
- ["About Pick-list Relationships"](#) on page 2-4
- ["About Database Lookups"](#) on page 2-5
- ["About Committing Documents"](#) on page 2-6
- ["About the Import/Export Utility"](#) on page 2-15

### 2.1 About Capture Administration Tasks

Capture provides a central administration area in which administrators create elements to be used throughout Capture components. For example, you can create file cabinets and index fields in Capture Administration, then use them in multiple types of profiles in Capture components.

Use Capture Administration to create or change:

- File cabinets
- Index fields
- Batches
- Commit profiles
- Users
- Pick-lists and pick-list relationships
- Database lookups

### 2.2 About File Cabinets

In Capture, you define the file cabinets into which batches are scanned. For this reason, create file cabinets with the structure of your content management system in mind.

When creating a file cabinet, you define the following:

- its **index fields**. Documents are archived in the content management system according to index field values and users search for them in the content management system using these values.
- its **batch statuses**. In Capture components, batches can be automatically assigned a status and users can assign a different status as needed.
- its **commit profiles**. A commit profile specifies how batches are committed and archived to a commit folder or content management system.
- its **database lookup profiles**. A database lookup profile provides link information to a database. You can incorporate database lookup profiles to search and populate index fields.

## 2.3 About Index Fields

An integral part of creating a file cabinet is defining its index fields. Users will enter values in these fields while indexing, and end users will later search for documents in the content management system using these fields. Values can also be auto populated, derived from bar codes read by Recognition Server, selected from pick-lists, or selected from a database lookup.

After you create index fields, you can specify more detailed settings for them in an index profile (in Oracle Document Capture) or a scan profile (in Oracle Distributed Document Capture). For example, you might set up an input mask for an index field to control what users type into the field when indexing. Or, you can specify that an index field is required upon creating it, then make the field sticky or locked in the profile.

## 2.4 About Users in Capture

There are two types of users in Capture:

- *Administrators*, who have access to Capture Administration options and all file cabinets.
- *Users*, who have access to one or more file cabinets and their associated profiles.

The security model chosen during configuration affects how administrators manage users in Capture and whether users log in:

- With *Capture security*, you add users and assign them file cabinets and administration rights in Capture Administration. Users are required to log in to Oracle Document Capture.
- With *Windows Domain security*, users are created and assigned to groups in the Windows Domain. You assign file cabinets and administration rights to domain users or groups of domain users in Capture Administration. Typically, users are not required to log in. However, you can opt to require users to log in, which allows a user other than the domain user to log in to Capture.

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**Note:** The Commit Server, Recognition Server and Import Server provide an unattended login setting for automatic login. For unattended login to work, the administrator must be added as an individual Capture user rather than added as a member of a domain group.

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## 2.5 About Managing Batches

In Capture, users scan and index documents in batches. Batches can be assigned a status, priority, and notes. This section describes the following batch administration tasks:

- ["About Batch Status"](#) on page 2-3
- ["About Batch Manager"](#) on page 2-3
- ["About Locked Batches and User Batch Activity"](#) on page 2-3

### 2.5.1 About Batch Status

The batch status feature provides a standardized way of assigning statuses to batches. In Capture Administration, you create a list of possible statuses, which can then be assigned to batches through profiles. Users can view status, enter new statuses, and search for batches based on status. In addition, the servers can process jobs based on status.

### 2.5.2 About Batch Manager

The Batch Manager component provides a comprehensive view of all Capture batches on the network in a Windows Explorer-like environment. Use Batch Manager to:

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

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

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### 2.5.3 About Locked Batches and User Batch Activity

Oracle Document Capture provides a locking mechanism for batches to ensure that multiple users cannot access the same batch at the same time. As soon as a user accesses a batch, Capture immediately locks it. If the user's session is interrupted (for example, if the computer crashes), this user can restart his or her system and access the batch again, because the batch was locked to this user. However, if another user attempts to access the same batch, he or she will not be able to access it, because the batch was previously locked by another user.

Oracle Document Capture administrators can monitor user activity at any time, viewing the batches, users and workstations in use. You can also unlock a batch if necessary, to allow another user to access it. (This functionality is not available for Oracle Distributed Document Capture client batches.)

Before unlocking a batch, an administrator should make certain that the batch is not in use.

## 2.6 About Pick-lists

A **pick-list** provides users with two or more values from which to choose. Pick-lists can significantly speed up indexing and prevent data entry errors.

You define pick-lists in Capture Administration, then select them in Capture components. This allows you to use the same pick-list in several Capture components.

When creating a pick-list, you first specify its **pick-list source**. You can create these types of sources:

- **Capture Native Pick-lists.** Use this type when you want to enter and maintain values in Capture. For example, you might create a pick-list named Document Type that contains ten document type values to ensure that users select only one of the ten types. (Note that you can **import** pick-list values into the Capture database from a text file as well as **export** pick-list values to a text file.)
- **Database Pick-lists.** Use this type when you want Capture to display pick-list values dynamically retrieved from an external database. This is useful when pick-list values are subject to change, since a database pick-list always displays current values from a database table.

After creating one or more pick-lists, you can then:

- Use them in a Capture component. See [Table 2-1](#).
- Define parent-child relationships between them, as described in "[About Pick-list Relationships](#)" on page 2-4.

**Table 2-1 Pick-list Use in Capture Components**

Capture Component	Pick-list Type	Configuration Location	Function
Index	Pick-list	Index profiles	Create a pick-list index field.
Index	Pick-list Relationship	Index profiles	Create linked pick-list index fields, where a selection in the parent field determines the values displayed in the child pick-list field.
Recognition Server	Pick-list	Batch jobs	Assign a bar code value that matches a pick-list value to an index field.
Oracle Distributed Document Capture	Pick-list	Scan profiles	Create a pick-list index field.
Oracle Distributed Document Capture	Pick-list Relationship	Scan profiles	Create linked pick-list index fields, where a selection in the parent field determines the values displayed in the child pick-list field.
UCM Commit Profile Driver	Pick-list	Oracle UCM commit profiles	Dynamically assign a type, security and/or account based on a pick-list index field value.

## 2.7 About Pick-list Relationships

Use the Pick-list Relationships functionality in Capture Administration to create parent/child relationships between pick-lists. In a parent/child relationship, a parent field is linked to one or more child pick-lists, one of which is displayed after the user makes a selection in the parent field.

For example, you might configure a parent field called *Department* and a child field called *Document Type*. Based on users' selection in the *Department* field, the *Document Type* field displays the appropriate child pick-list containing document type choices for the selected department.

Here are some important points about pick-list relationships.

- You can create pick-list relationships using Capture Native pick-lists or database pick-lists.
- Create all pick-lists you plan to link before creating a pick-list relationship.
- After creating a pick-list relationship profile, select it in a profile when configuring index field properties.
- Each item in a child list can be related to multiple parent items. For example, Correspondence could be a child item to Sales and Accounting parent items.
- You can identify one pick-list relationship profile only in a profile when configuring index field properties. Multiple parent/child relationships must be defined within a single pick-list relationship profile.
- You can create multi-level relationships (for example, great grandparent, grandparent, parent, and child pick-lists).

## 2.8 About Database Lookups

A database lookup provides external database searching, which can reduce data entry requirements. While indexing, a user enters a value in an index field and clicks a database lookup button. The Capture component searches a specified database field for a matching value, and if found, automatically populates other specified index fields. If the Capture application finds multiple values that match, it displays them in a hit list from which the user chooses. Database lookups can significantly speed up indexing and prevent errors.

You define database lookups in Capture Administration, then select them when creating profiles in Capture components. This allows you to use the same database lookup profile in several Capture components. [Table 2-2](#) lists Capture components in which you can use database lookups.

- Database lookups are associated with a file cabinet. A file cabinet can have multiple database lookups.
- If a single matching record is found in the database, the fields are automatically populated, unless the index profile's **Always display hit-list option** is selected.
- In addition to database lookups, you can also create database pick-lists. A database pick-list displays values dynamically retrieved from an external database file.
- Capture provides flexibility in database searching. For example, you can configure multiple search fields, providing the user with multiple means of matching a database record. In addition, you can map file cabinet fields to different tables within a database.

**Table 2–2 Database Lookup Use in Oracle Document Capture Components**

Capture Component	Configuration Location	Function
Index	Manage Index Profiles, General tab	Search a database for a matching record and if found, populate index fields with other values in the database record.
Oracle Distributed Document Capture	Administration, Database Lookup pane	Search a database for a matching record and if found, populate index fields with other values in the database record.
Import Server	Batch Job Settings, Processing tab	After importing images, search a database field for matching index values (from a list file) and populate index fields from the database table.
Recognition Server	Batch Job Settings, Database Lookup tab	Search a database using a bar code value and populate index fields using values returned from it.

## 2.9 About Committing Documents

Committing archives batches from a Capture file cabinet to another system, typically a content management system. This section covers the following topics:

- ["Methods of Committing Documents"](#) on page 2-6
- ["About Commit Profiles"](#) on page 2-7
- ["What Happens During the Commit Process?"](#) on page 2-8
- ["About Document Output Formats"](#) on page 2-8
- ["About Duplicate Commit Options"](#) on page 2-9
- ["About Commit Error Handling"](#) on page 2-9
- ["About the Oracle UCM 10g Commit Driver"](#) on page 2-9
- ["About the Oracle UCM 11g Commit Driver"](#) on page 2-10
- ["About the Oracle I/PM 10g Commit Driver"](#) on page 2-11
- ["About the Oracle I/PM 11g Commit Driver"](#) on page 2-12
- ["About the Text File Commit Driver"](#) on page 2-14
- ["About the Electronic Document Provider Commit Driver"](#) on page 2-14
- ["About the Database Commit Driver"](#) on page 2-15

### 2.9.1 Methods of Committing Documents

Organizations choose to commit batches in a variety of ways, depending on the configuration of their content management system.

- Some organizations use the **Oracle UCM, Oracle UCM 11g, Oracle I/PM, or Oracle I/PM 11g** commit drivers to commit documents directly into Oracle UCM 10g or 11g, or into Oracle I/PM 10g or 11g, respectively.
- Some organizations commit to a **commit text file**, then import batches into their content management system. The commit file can be customized to contain the information needed, but typically contains the full path to images and index values.

- Other organizations use an **EDP (Electronic Document Provider) macro** or other **commit driver** to commit directly to their content management system.
- Still other organizations **do not create a commit file**, but instead write image documents to a specified location, often for archival or backup purposes.
- Organizations may choose to **commit to a database**. The Capture database commit driver lets you commit to commonly used databases in a variety of ways.

## 2.9.2 About Commit Profiles

You apply commit settings by creating one or more commit profiles for a file cabinet in Capture Administration. Commit drivers include:

- **Oracle I/PM Commit Driver (10g)**, and **Oracle I/PM 11g Commit Driver**, which commit documents directly into Oracle Imaging and Process Management 10g and 11g.
- **Oracle UCM Commit Driver (10g)** and **Oracle UCM 11g Commit Driver**, which commit documents directly into Oracle Universal Content Management 10g and 11g.
- **Commit Text File**, which writes a text file containing data about the committed images, such as index field values and batch information.
- **Electronic Document Provider**, which uses the EDP macro you specify to determine how documents are committed.
- **Database Commit Driver**, which commits document files from Capture to a folder whose path is stored in the database or to a database table, storing them in an image/blob field.

### Important Points About Commit Profiles

- Commit profiles are processed one at a time. Capture starts the commit process by loading all the settings related to the first commit profile and begins to commit all the documents within the batch. Once the first profile has completed, it then loads all the settings for the second profile, and continues to commit all the documents within the batch, repeating this process until all commit profiles have been executed or an error occurs which causes the entire commit process to be canceled.

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**Note:** Because documents could be committed more than once when using multiple commit profiles, it is recommended that you position the commit profile most likely to fail first.

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- You can assign one or more commit profiles to a file cabinet. For example, one commit profile may commit documents to a content management system, while another commits to a commit file. A Service Bureau might output to a commit text file containing pointers to the images, then FTP the information to clients. Still another organization might commit directly into their content management system and create a commit file for backup, to be kept for 90 days or archived permanently.
- A commit profile is used regardless of the Capture program that actually performs the batch commit.
- A file cabinet **MUST** have at least one active commit profile in order to commit documents. Commit profiles, once activated, are executed in order. When creating a commit profile, you also specify how you want errors handled.

- By default, images are output in their native format (the format in which they were scanned or imported into Capture). However, using commit profile options, you can convert documents to a different output format upon committing, such as multiple page TIFF, image PDF (Image Only) or PDF (Searchable); see "[About Duplicate Commit Options](#)" on page 2-9. Note that PDF (Searchable) is available for Oracle Document Capture only.

### 2.9.3 What Happens During the Commit Process?

- Capture begins processing all pages.
- The index values of pages are analyzed to create logical documents. Any image with like index values is put into a logical document.
- Capture commits a batch on a per document basis. A document may consist of one or many pages.
- As each document is successfully committed within a batch, Capture removes the document's images and associated index data from the batch. When there are no remaining pages in the batch, Capture deletes the batch.
- If a document fails to be committed, it remains in the batch and an error is generated.
- A Commit Batch audit record is added to the ecAudit table.

### 2.9.4 About Document Output Formats

Regardless of a document image's native format (the format in which it was scanned or imported into Capture), you can convert it to a different format upon committing it. By default, document images are committed in their native format. To convert them, choose a new format:

- **Native Format:** No conversion takes place.
- **Single Page TIFF:** Converts black/white, grayscale and color images to Group 4 TIFF format.
- **Multi Page TIFF:** Converts documents to multiple page, Group 4 TIFF format.
- **PDF (Image Only):** Converts documents to PDF (portable document format). You can also specify a file compression setting for images committed using this format. Note that the higher the file compression, the smaller the file size and lower the quality.
- **PDF (Searchable):** Converts documents to PDF (portable document format) with text users can search. (This option is available for Oracle Document Capture only.)

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**Caution:** The PDF (Searchable) option uses Optical Character Recognition (OCR) when creating PDF documents that users can search. Note that the hidden text (the OCR results) within PDF (Searchable) documents CANNOT be edited and may contain errors.

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Each output format except PDF (Searchable) allows you to configure full text OCR. This option generates a text file containing all text found in documents by Optical Character Recognition. Depending on the capabilities of your content management system, the full text file can be used for document searching and retrieval.

## 2.9.5 About Duplicate Commit Options

All documents in which an error is encountered remain in the batch until the error is resolved and they are committed again. When multiple profiles are used, this means that documents can be committed more than once. For example:

- Commit Profile 1 commits the entire batch of 100 documents.
- Commit Profile 2 commits up to 50 documents successfully, and encounters an error on document 51.
- After the first commit, 50 documents remain in the batch.
- The user or administrator corrects the problem related to Commit Profile 2.
- User commits the batch again.
- Commit Profile 1 commits the remaining 50 documents again.
- Commit Profile 2 commits the remaining 50 documents.

In this example, Commit Profile 1 redundantly commits the same 50 documents. In general, it is recommended that you place the commit profile with the greatest likelihood of failing at the top of the list.

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**Note:** You can prevent some duplicate committing problems when creating the commit profile, by selecting **Abort** or **Overwrite** in the **If document file already exists** field (provided the commit driver supports this capability).

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## 2.9.6 About Commit Error Handling

Use a commit profile's error handling options to customize what happens when errors are encountered during batch committing. (It is recommended that you NOT enable advanced error handling.)

- Select the **Enable Advanced Error Handling** field to make advanced error handling selections. If you leave this field deselected (the default), any warning or critical error will halt the commit profile and commit process. This is the most conservative setting.
- You can opt for a less conservative setting by selecting options from the Error level fields. Depending on your selections, an error can stop the current commit profile from further use or stop the entire commit process, including any other commit profiles, from executing. For more information, see "[Error Handling Examples](#)" on page 13-11.
- Regardless of error settings, all documents in which an error is encountered remain in the batch until the error is resolved and they are committed again. As a result, it is possible for a document to be committed more than once when using multiple commit profiles.

## 2.9.7 About the Oracle UCM 10g Commit Driver

Use the Oracle UCM 10g Commit Driver to commit documents from Capture into Oracle UCM 10g. For information about committing to Oracle UCM 11g, see "[About the Oracle UCM 11g Commit Driver](#)" on page 2-10.

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**Note:** You can commit documents to Oracle UCM in the following formats: Multiple Page TIFF, PDF (Image Only), and PDF (Searchable). PDF (Searchable) is available for Oracle Document Capture only.

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Configuring the driver settings involves the following main steps.

1. Enter Oracle UCM login information.
2. Specify how the documents will be stored in Oracle UCM, including how they will be named, and who can view and access them. You can assign type, security group, and account values to documents in one of these ways:
  - Assign them a static value
  - Assign them based on Capture index field values
  - Assign them based on pick-list values users select
3. Map Capture index fields to Oracle Content Server fields. As documents are committed using this driver, values entered in Capture will be written into the specified Content Server fields.

## 2.9.8 About the Oracle UCM 11g Commit Driver

Use the Oracle UCM 11g Commit Driver to commit documents from Capture 10g release 10.1.3.5 or later to Oracle UCM 11g. This commit driver uses the UCM RIDC API to call Oracle UCM's check-in service for the commit. (For information about committing to Oracle UCM 10g, see "[About the Oracle UCM 10g Commit Driver](#)" on page 2-9.)

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**Note:** You can commit documents to Oracle UCM 11g in the following formats: Multiple Page TIFF, PDF (Image Only), Native File, and PDF (Searchable). Note that PDF (Searchable) is available for Oracle Document Capture only. Native File should be used for custom applications only.

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Configuring the driver settings involves the following main steps.

1. Entering Oracle UCM login information.
2. Specifying how to make the documents visible in Oracle UCM, including how to name them, and who can view and access them. You can assign type, security group, and account values to documents using one of these methods:
  - Assign them a static value
  - Assign them based on Capture index field values
  - Assign them based on pick-list values users select
3. Mapping Capture index fields to Oracle Content Server fields. As documents are committed using this driver, values entered in Capture are written into the specified Content Server fields.

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**Note:** You can also add or edit custom fields and write Capture values to them during commit.

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4. Setting additional options, such as error logging, document naming, workflow bypass, and web service overrides.

## 2.9.9 About the Oracle I/PM 10g Commit Driver

Use the Oracle I/PM 10g Commit Driver to commit from Capture into Oracle I/PM 10g. For information about committing to Oracle I/PM 11g, see ["About the Oracle I/PM 11g Commit Driver"](#) on page 2-12.

You can archive documents using one or both of these methods:

- **Direct Connect:** Commits documents directly into Oracle I/PM.
- **Filer File Commit:** Creates an Oracle Filer file for each committed batch.

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**Note:** In order to file documents directly from Capture to Oracle I/PM, the Oracle I/PM client must be installed on the server or workstation that performs batch commits. If the Commit Server is performing all batch commits, Oracle I/PM must be on the Commit Server only.

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**Note:** COLD SQL applications are not supported.

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### Direct Commit Guidelines

The key to successfully archiving documents from Capture directly into Oracle I/PM is to properly configure your Capture file cabinets.

Make sure that field data types match. During a batch commit, the Oracle I/PM driver verifies that a specified I/PM application exists and ensures that the fields are compatible. If the driver detects a problem, it displays or logs a message and aborts the commit process.

### Indirect (Filer) Commit Guidelines

When archiving documents indirectly using Filer files, file cabinet and application names do not have to match. However, you need to ensure that your Filer file definitions are correct so they correspond to the Filer files generated by Capture.

- The first time you commit a batch using the Filer method, Capture generates a text file in the Commit Folder called *FILEXREF.TXT*. This file lists all Capture file cabinets along with a unique ID associated with each file cabinet. Use this file when configuring Oracle Filer to run in Server Mode.
- When you commit a Capture batch, it generates an Oracle Filer file with a file extension that represents the associated Capture file cabinet ID. You can then use these IDs to configure Filer to process specific files within the Filer folder (for example, \*.001, \*.002, and so on...).

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**Note:** If you need to support multiple configurations, create multiple Oracle I/PM commit profiles and configure them differently.

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### 2.9.9.1 About Process Integration

As part of configuring an Oracle I/PM commit profile, you can set up an Oracle I/PM Process integration. To do so, you enable Process functionality, specify a Process

database, and then select detailed Process configuration settings. See "[Oracle I/PM Commit Settings Screen, Process Setup](#)" on page 13-31.

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**Note:** You must have Process administrator rights. The user account is used exclusively by the Process integration as a service account to create and append Process packages.

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## 2.9.10 About the Oracle I/PM 11g Commit Driver

Use the Oracle I/PM 11g Commit Driver to commit documents from Capture 10g release 10.1.3.5 or later to Oracle I/PM. (For information about committing to Oracle I/PM 10g, see "[About the Oracle I/PM 10g Commit Driver](#)" on page 2-11.

Use the Oracle I/PM 11g driver to commit documents using one of these methods:

- **Direct Commit**, where Capture connects to an Oracle I/PM instance and commits documents directly into Oracle I/PM. See "[About Direct Committing](#)" on page 2-12.
- **Input Agent Commit**, where Capture creates input files for Capture batches, which are then uploaded in bulk to Oracle I/PM by its Input Agent service. See "[About Input Agent Committing](#)" on page 13.

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**Note:** To support multiple configurations, create multiple Oracle I/PM 11g commit profiles in Capture and configure them differently. For example, to output documents directly and via input agent (where documents output via the input agent files might serve as a backup), create and activate both types of commit profiles.

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### 2.9.10.1 About Direct Committing

With a direct commit profile, Capture logs into Oracle I/PM and commits documents directly using Oracle I/PM's web services. Creating this type of Oracle I/PM commit profile involves the following configuration:

1. Enter login information for the Oracle I/PM 11g commit driver to automatically connect to the Oracle I/PM system.

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**Note:** Each time you commit using an Oracle I/PM 11g direct commit profile, Capture connects to the specified Oracle I/PM instance, then logs out after the commit is complete.

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2. Map Capture index fields to Oracle I/PM application metadata fields.

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**Note:** To successfully commit documents, the data types of mapped Capture index fields and Oracle I/PM application fields must match. If the commit driver detects a problem, such as incompatible fields, it displays or logs a message and stops the commit process.

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3. Optionally set the commit driver to search for matching Oracle I/PM documents and append to them, if found. To search for matches, you select a search definition created in Oracle I/PM.
4. Optionally enable logging and its detail level.

**2.9.10.1.1 About Searching For and Appending to Oracle I/PM Documents** You can set the commit profile to search for matching documents during direct commits. When searching, Capture compares index values for the document being committed to search parameters specified in the selected Oracle I/PM search definition. For more information about creating Oracle I/PM search definitions, see the *Oracle Fusion Middleware Administrator's Guide for Oracle Imaging and Process Management*.

When searching and appending...

- If Capture finds a match to an existing document, it appends the new document to the matched document.
- If Capture does not find a match, a new document is created.
- If Capture finds multiple matching documents, the document commit stops.

#### **Important Points About Searching and Appending**

- The Searching and appending option is available for Multiple Page TIFF documents only. (In the commit profile's main settings, the Document Output Format field must be set to **TIFF - Multiple Page**).
- Because the performance of searches affects the performance of the commit process, searches should be carefully defined and tuned.
- The Oracle I/PM search definition is integral to matching, and must reflect index profile settings in Oracle Document Capture or scan profile settings in Oracle Distributed Document Capture. For example, if a Capture profile contains five index fields but the search definition contains three fields only, searches are less specific, and documents considered separate documents in Capture could be appended to in Oracle I/PM. In addition, the search definition must use AND conditions, not OR conditions.
- Depending on the database used for the Oracle I/PM server, the search may be case sensitive, meaning that if index values are identical but their case differs, no matching occurs.

#### **2.9.10.2 About Input Agent Committing**

During an input agent commit, Capture writes a delimited input file for the batch, along with its images, to a specified *Capture output directory*. The input file lists document images along with their associated index values for bulk uploading into Oracle I/PM. The Oracle I/PM input agent service monitors a specified *input agent input directory* and upon finding input files that match its input mask, uploads the files' referenced documents in bulk into Oracle I/PM.

Creating this type of Oracle I/PM commit profile involves the following configuration:

1. Enter login information for the Oracle I/PM 11g commit driver to connect to the Oracle I/PM system for field mapping definition.
2. Specify the Capture output directory in which Capture writes input files and images upon commit. In addition, you also specify the input agent input directory from which the Oracle I/PM input agent uploads documents.

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**Note:** These settings identify the same directory but in different ways. For example, if Capture is running on a Windows system and Oracle I/PM is running on a Linux system, these fields would contain different paths to the same location.

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3. Map Capture index fields to a selected Oracle I/PM input definition.

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**Note:** When committing documents indirectly using input files, Capture file cabinet and Oracle I/PM application names do not have to match. However, you must ensure that your input file definitions are correct so they correspond to the input files generated by Capture.

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4. Optionally enable logging and its detail level.

**2.9.10.2.1 About Input Definitions** Configuring an input agent commit requires an input definition created in Oracle I/PM's Manage Inputs area. For information, see the *Oracle Fusion Middleware Administrator's Guide for Oracle Imaging and Process Management*.

Creating an input definition in Oracle I/PM includes these steps:

1. Upload a sample file that specifies how input files from Capture are composed. The sample file also specifies how input files are named, as described in "[How Capture Names Input Files Upon Commit](#)" on page 2-14.
2. Specify the application in which to write Capture index values as metadata values based on field mapping.
3. Based on the sample file, define an input mask that the input agent uses to locate files for input. For example, if you specify a mask of *ServiceReportsInput\*.txt*, the input agent finds and processes input files that begin with that name.
4. Define a delimiter that specifies the character by which values in the input text file are separated. For example, enter a pipe (|) character.

**2.9.10.2.2 How Capture Names Input Files Upon Commit** Input files Capture creates are named based on:

- The sample file used to create the input agent definition in Oracle I/PM
- A unique number
- The sample file's extension

For example, using a sample file named *ServiceReportsSample.txt* (and a \* wildcard in the input definition), Capture might write an input file called *ServiceReportsSample789238749.txt*.

## 2.9.11 About the Text File Commit Driver

The Commit Text File profile is a standard commit profile provided with installation. By default, it creates a quotation, comma-separated text file that contains the full path to each image file, followed by document index data. The images are extracted from the batch and inserted into a folder beneath the commit folder. The text file and new batch folder are created under the Commit folder specified during batch setup.

You can change the text file commit driver's default settings. For example, you might change where files are written, which values are written and delimited in the text file, and how files are named.

## 2.9.12 About the Electronic Document Provider Commit Driver

If your organization commits batches directly to a content management system other than Oracle UCM or Oracle I/PM, use an EDP (Electronic Document Provider) macro

or another commit driver to commit them. For detailed information about writing macros for use in Capture, see the *Developer's Guide for Oracle Document Capture*.

### 2.9.13 About the Database Commit Driver

The database commit driver enables organizations to commit from Capture to a variety of databases, such as Oracle, Microsoft SQL Server, and Microsoft Access.

You can commit document files to one or both of these locations:

- to a **folder** whose path is stored in the database
- to a **database table**, storing them in an image/blob field

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**Note:** You can also skip saving the document files, and write document values only to new records in a database table. This can be useful when integrating data with third-party applications.

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To write document index values to the database, you map Capture index fields to fields in the database table.

#### 2.9.13.1 About Committing Index Values to Linked Tables

As an option, you can write Capture values to two tables linked by a key field. Typically, this option is used to search for one or more higher level values in a parent table (writing a new record if needed and allowed), and then use an associated primary key to insert records in the document table and write detailed values there.

For example, a database might contain a parent table called *Customer* and a document table called *Work Orders*. The Customer table contains customer ID and name fields, while the document table contains detail fields. Each table contains a Cust ID field, which would function as the key field.

Capture provides two ways to search the parent table: search multiple fields for a match or search the parent key field only. For more information, see "[Linked Tables Searching](#)" on page 13-49.

## 2.10 About the Import/Export Utility

The Import/Export Utility is used to migrate Oracle Document Capture or Oracle Distributed Document Capture elements from one instance to another. The Import/Export utility must be installed on each workstation that contains one or more Oracle Document Capture or Oracle Distributed Document Capture components.

Using the utility, you can select individual elements (such as a server batch job) or entire components (such as all Scan for ISIS profiles and macros). In addition, you can export and import an entire configuration in order to create a snapshot of the system configuration at a certain point in time. You can use the utility to migrate a system from testing to production, to aid in troubleshooting, or as a quick means of distributing profiles.

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**Note:** The utility imports and exports configuration settings only. No data, such as uncommitted batches, is affected.

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When you export, elements are stored in multiple XML files, then packaged as a zipped file containing all information needed to re-create those elements on another

system. When you import, the utility looks for elements of the same name, overwriting them if a match is detected or adding them if not.

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**Note:** All file cabinet-related elements are exported and imported together. This means that importing any exported file cabinet element (such as a database lookup profile) overwrites the entire file cabinet of the same name. For this reason, it is important to export all file cabinet elements you want the file cabinet to contain at the same time.

Note that you can import elements that are separate from file cabinets, such as profiles and pick-lists, individually.

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Table 2-3 lists, by component, elements available for import and export. You can import and export all profiles and macros, and all administration elements except users. Index system settings and Distributed Document Capture Server Configuration settings are not available for import. In addition, Commit Server, Recognition Server, and Import Server general settings and schedules are not available for import.

**Table 2-3 Capture Elements Available For Export and Import**

Component	Element	Export/ Import	No Export/ Import
All Components	Macros	X	
Administration	File cabinets	X	
	Index fields	X	
	Batch statuses	X	
	Database lookup profiles	X	
	Pick-list sources, pick-lists (database and native)	X	
	Pick-list relationship profiles	X	
	Users		X
Scan for ISIS	Scan profiles	X	
Scan for Adrenaline	Scan profiles	X	
Index	Index profiles	X	
	Index tool settings		X
Oracle Distributed Document Capture	Scan profiles	X	
	VBScripts	X	
	Server Configuration		X
Commit Server, Recognition Server, Import Server	Batch jobs	X	
	Scheduled jobs		X
	General Settings		X

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## Administering Scan for ISIS

This section contains the following topics:

- ["Adding a Scan Profile"](#) on page 3-1
- ["Deleting a Scan Profile"](#) on page 3-2
- ["Copying a Scan Profile"](#) on page 3-2
- ["Selecting a Scanner"](#) on page 3-2
- ["Selecting Scanner Settings"](#) on page 3-3
- ["Importing Images"](#) on page 3-3
- ["Endorsing Scanned Documents"](#) on page 3-3
- ["Selecting Image Processing Filters"](#) on page 3-4
- ["Testing Scan Profiles as a User"](#) on page 3-8

### 3.1 Adding a Scan Profile

Follow these steps to add a Scan for ISIS profile.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the Manage Scan Profiles screen, click the **Create** button on the screen's toolbar to add a profile. A new profile is displayed in the side pane.
3. In the **Profile Name** field, enter a name for the scan profile.
4. Specify how batches will be automatically named as they are created. (Skip this step if you want users to name batches.)
  - a. In the **Batch Prefix** field, type a prefix (up to eight characters) to be assigned to batches.
  - b. Select the **Auto Sequence** field.
5. In the **File Cabinet** field, select the file cabinet to which you want batches assigned.
6. In the **Task Description** field, enter optional instructions for the user scanning with this profile.
7. Select **Image Source** options in the side pane. Select a scanner or folder from which to import images. See ["Selecting a Scanner"](#) on page 3-2 or ["Importing Images"](#) on page 3-3.
8. In the **File Type** field, specify how you want scanned images stored in Capture.

9. Select image processing settings (optional). Use the remaining options in the side pane to enhance scanned images. Select the **Filter Execution Order** option to select the order in which filters are run during scanning.
10. Click the **Save** button.
11. Test the scan profile's settings. See "[Testing Scan Profiles as a User](#)" on page 3-8.

## 3.2 Deleting a Scan Profile

Follow these steps to remove a scan profile no longer in use. Deleting a scan profile does not affect batches previously scanned using the profile.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the main toolbar.
2. From the side pane of the Manage Scan Profiles screen, select a profile to delete.
3. Click the **Delete** button, then confirm the deletion.

## 3.3 Copying a Scan Profile

Follow these steps to make a copy of a scan profile. This is useful for making variations to a scan profile while retaining the original.

1. In the side pane of the Manage Scan Profiles screen, select the scan profile you want to copy.
2. Click the **Copy** button. A duplicate of the profile is added to the side pane.
3. Select settings and save the profile.

## 3.4 Selecting a Scanner

Follow these steps to select a scanner for use with the selected scan profile.

1. In the side pane of the Manage Scan Profiles screen, choose Image Source options for the selected scan profile.
2. Choose **Scanner** from the Select Image Source options.
3. Click **Select Scanner**. The Scanner Selection dialog box is displayed, listing all scanners for which you have ISIS drivers installed.
4. To add a scanner driver, click the **Add** button.
5. In the Add Scanner dialog box, specify a driver location and click **OK**. The driver is added and displayed in the Scanner Selection list.

For document imaging scanners, most manufacturers provide the ISIS drivers on a CD shipped with the scanner. It is recommended to check the manufacturer's Web site for update drivers. Typically, the ISIS drivers are installed using a separate installation program.

6. Click **Setup** to configure scanner settings. The settings that display depend on the selected scanner. See the documentation that came with the scanner for more information.
7. Select scanner settings. See "[Selecting Scanner Settings](#)" on page 3-3.

## 3.5 Selecting Scanner Settings

Follow these steps to configure scanner settings for a selected profile.

Set your scanner settings so they accommodate most of the documents being scanned using the selected scan profile. Users can override a profile's scanner settings without changing the profile, then select the profile again to reload the default profile settings.

1. Click the **Scanner Settings** button from the Image Source options in the Manage Scan Profiles screen. The Scanner Settings dialog box is displayed. The fields and available options depend on your selected scanner.

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**Note:** This dialog box also displays to users when they click the Scanner Settings button in the Batch Scanning screen, allowing them to adjust settings for any new images scanned into the current batch.

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2. Select scanner settings. These may vary depending on scanner, but typically include settings such as resolution, page size, dither, paper source, duplex, endorsing, and brightness and contrast control.
3. Click the **More** button and select advanced options.

## 3.6 Importing Images

Follow these steps to set a selected scan profile to import rather than scan images.

1. In the side pane of the Manage Scan Profiles screen, choose **Image Source** options for the selected scan profile.
2. Choose **Disk** from the Select Image Source options. Specify a folder in the **Default Import Folder** field. When users begin scanning, this path will be selected in the standard file dialog box that prompts users to select files to import.
3. Select the **Delete Files After Import** field to delete images from the import folder as they are imported (optional).

## 3.7 Endorsing Scanned Documents

Follow these steps to set automatic imprinting of images as they are scanned.

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**Note:** Endorsing options are available only if the scanner you are using supports endorsing.

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1. Click the **Scanner Settings** button from the Image Source options in the Manage Scan Profiles screen. In the Scanner Settings dialog box, select **Use 'More' Settings** or **Manual**. (See "[Selecting Scanner Settings](#)" on page 3-3.)

If you selected **Use 'More' Settings**, click the **More** button and select Endorsing options in the dialog box that displays. The specific endorsing options available depend on the scanner driver being used. For information about specific endorsing options, refer to the documentation provided with the scanner.

2. If you selected Manual, click **Configure** and select settings in the Manual Endorsing Properties dialog box.
  - a. In the **Prints text on every page** field, type the text you want to imprint on each page.

- b. Select the fields corresponding to items you want displayed on the document. For example, to include the date, select the **Include Current Date** field and select a date format.

## 3.8 Selecting Image Processing Filters

This section covers the following topics:

- ["Setting the Order in Which Filters Are Run"](#) on page 3-4
- ["Setting Bar Code Detection"](#) on page 3-4
- ["Detecting and Removing Blank Pages"](#) on page 3-5
- ["Detecting Patch Codes"](#) on page 3-5
- ["Removing Borders, Halftones and Holes"](#) on page 3-6
- ["Cropping Images and Setting White Space"](#) on page 3-6
- ["Straightening Skewed Images"](#) on page 3-6
- ["Expanding and Trimming Black Objects On Images"](#) on page 3-7
- ["Smoothing and Inverting Images"](#) on page 3-7
- ["Removing and Redrawing Lines On Images"](#) on page 3-7
- ["Removing Noise From Images"](#) on page 3-8
- ["Rotating and Scaling Images"](#) on page 3-8

### 3.8.1 Setting the Order in Which Filters Are Run

Follow these steps to set a different order for the filters by changing the default order.

1. In the Manage Scan Profiles screen, select the **Filter Execution Order** option in the side pane.
2. Change the filter order. Reposition a filter in the list by selecting it and clicking the up or down arrow. To return to the default order, click the **Default Filter Order** button.
3. Save the profile.

### 3.8.2 Setting Bar Code Detection

Follow these steps to specify whether and how bar codes are detected during scanning. You can use bar code values detected during scanning in index profiles to separate documents or assign to index fields.

1. In the Manage Scan Profiles screen, select the **Bar Code Detection** option in the side pane.
2. Select the **Detect Bar Codes** field.
3. If your scanner has built-in bar code detection, select **Use Hardware Detection** and skip the remaining steps. Otherwise, leave **Use Software Detection** selected.
4. In the Types to Detect field, select the bar code types you want Scan to detect. Click **Select All** to select all bar codes listed. The fewer types you select, the faster images are processed.

5. In the **Orientations to Detect** field, select the orientation of the bar code on the scanned paper. Selecting all three orientations (**Horizontal**, **Vertical** and **Diagonal**) is recommended, as scanned images may be skewed.
6. In the **Detect by Height** and **Minimum Height** fields, specify the page amount you want searched for bar codes (if known). Reducing the amount searched increases detection speed.
7. In the **Detect by Length** field, specify the number of characters in bar codes to detect (if known). This increases detection speed and accuracy. Detected bar codes that do not match that length are ignored.
8. Select the **Return Raw Data** field to return any special characters in bar code values. (This setting is typically for diagnostic purposes only.)
9. If poor quality images will be scanned using this profile, select the **Use MultiBand Analysis** field. Selecting this field, however, may increase processing time.
10. In the **Apply to** fields, specify the image area on which you want bar codes detected. Specifying the bar code's location on the scanned page will increase performance and reduce processing time.
11. Save the profile.

### 3.8.3 Detecting and Removing Blank Pages

Follow these steps to remove blank pages during scanning and specify how blank pages are detected.

1. In the Manage Scan Profiles screen, select the **Blank Page/Patch Code Detection** option in the side pane.
2. Select the **Detect and Remove Blank Pages** field.
3. In the **Page is Blank If** field, specify the maximum noise allowed for a page to be considered blank. You can choose:
  - **Pristine White**: Considered a blank page if total black pixels on the page are less than 0.01% of total pixels.
  - **Dirty White** (default): Considered a blank page if total black pixels on the page are less than 0.5% of total pixels.
  - **Very Dirty White**: Considered a blank page if total black pixels on the page are less than 1% of total pixels.
  - **One Line OK**: Considered a blank page if clusters of black pixels (that might be considered text) are found on the page
4. Save the profile.

### 3.8.4 Detecting Patch Codes

Follow these steps to specify whether patch codes are detected during scanning. You can use patch codes detected during scanning in index profiles to separate documents.

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**Note:** If you encounter problems detecting patch codes, try improving pages' image quality using the Deskewing, Noise Removal, Line Editing or Smoothing/Inverting filters. Be sure to run these filters before the patch code detection filter. (See "[Setting the Order in Which Filters Are Run](#)" on page 3-4.)

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1. In the Manage Scan Profiles screen, select the **Blank Page/Patch Code Detection** option in the side pane.
2. Select the **Detect Path Codes** field.
3. Save the profile.

### 3.8.5 Removing Borders, Halftones and Holes

Follow these steps to automatically remove black borders, halftones and punch holes from images.

1. In the Manage Scan Profiles screen, select the **Border/Halftone/Hole Removal** option in the side pane.
2. Select the **Remove Black Borders** field to remove borders around image edges.
3. Select the **Remove Halftones** field to remove a background or graphics object from images. In the Apply to fields, specify the image area from which you want halftones removed.
4. Select the **Remove Punch Holes** field to detect and remove punch holes from image edges.
5. Save the profile.

### 3.8.6 Cropping Images and Setting White Space

Follow these steps to set image margins and add or remove white space around image edges.

1. In the Manage Scan Profiles screen, select the **Cropping/Picking Rectangle** option in the side pane.
2. Select the **Cropping Images/Picking Rectangle** field.
3. To crop images based on an image edge, select the **Detect Image Edge** and **Apply Margins** option. In the **Margins** fields, specify the amount of white space around images.
4. To capture only a portion of a scanned image, select the **Picking Rectangle** option.
  - a. In the **Horizontal Alignment** and **Vertical Alignment** fields, specify the point from which to begin the picking rectangle.
  - b. In the **Width** and **Height** fields, specify size of the rectangle.
5. Save the profile.

### 3.8.7 Straightening Skewed Images

Follow these steps to automatically straighten skewed images using the Deskew filter.

1. In the Manage Scan Profiles screen, select the **Deskewing** option in the side pane.
2. Select the **Deskew Images** field.
3. To rotate images a set amount, select **Rotate** and enter the number of degrees by which you want them rotated. You can rotate images from -44.9 to 44.9 degrees. A positive number rotates images to the left. A negative number rotates them to the right.
4. To detect a skew angle and correct it, select **Detect and Deskew** and select settings.

- a. Specify whether you want to use graphics or text to detect the skew angle.
  - b. Specify the minimum and maximum skew angle to detect (a range between 0 and 44.9 degrees).
  - c. Specify the direction in which you want the skew angle measured.
  - d. Specify how much of the image you want examined for the skew angle.
  - e. Select the **Remove Shear** field to remove shear from images.
5. Click the **Save** button.

### 3.8.8 Expanding and Trimming Black Objects On Images

Follow these steps to set the Dilation filter to expand the area of black objects or the Erosion filter to remove details from images.

1. In the Manage Scan Profiles screen, select the **Dilating/Eroding** option in the side pane.
2. Select the **Dilate Images** field or the **Erode Images** field.
3. In the **Apply Filter** field, enter the number of times to run the dilation or erosion filter. Setting this value to more than 1 for either filter can cause significant portions of image content to be lost.
4. In the **Direction** field, choose the direction(s) in which you want dilation or erosion performed on images.
5. In the **Apply to** fields, specify the image area you want dilated or eroded.
6. Save the profile.

### 3.8.9 Smoothing and Inverting Images

Follow these steps to set the Smoothing filter to delete bumps and spurs from text characters or objects on images. Set the Invert filter to change white pixels to black and black pixels to white.

1. In the Manage Scan Profiles screen, select the **Smoothing/Inverting** option in the side pane.
2. Select the **Smooth Images** field or the **Invert Images** field.
3. If smoothing images, select one or more smoothing modes.
4. In the **Apply to** fields, specify the image area you want smoothed or inverted.
5. Save the profile.

### 3.8.10 Removing and Redrawing Lines On Images

Follow these steps to set the Line Editing filter to remove and optionally redraw straight lines on form-type images.

1. In the Manage Scan Profiles screen, select the **Line Editing** option in the side pane.
2. Select the **Enable Line Repair/Removal** field.
3. Select one or more editing modes.
4. In the **Apply to** fields, specify the image area on which you want lines edited.
5. Select the **Detect Horizontal Lines** and/or **Detect Vertical Lines** field to detect horizontal and/or vertical lines.

6. Select the **Use Straight Line Algorithm** field to optimize straight line processing.
7. Specify minimum and maximum values.
  - a. In the **Minimum Length** field, enter the minimum length of horizontal or vertical lines to detect.
  - b. In the **Maximum Gap** field, enter the maximum white space allowed between two horizontal line-like or two vertical line-like objects for them to be considered a single line.
  - c. In the **Maximum Curvature** field, enter the maximum deviation from a straight line allowed for a horizontal line-like or vertical line-like object to be considered a line.
8. Save the profile.

### 3.8.11 Removing Noise From Images

Follow these steps to set the Noise Removal filter to detect and remove noise from images.

1. In the Manage Scan Profiles screen, select the **Noise Removal** option in the side pane.
2. Select the **Remove Noise** field.
3. Specify how you want noise detected on images. Scan removes noise objects that fit within the **Maximum Height**, **Maximum Width** and **Maximum Area Percent** field values.
4. In the **Apply to** fields, specify the image area from which you want noise removed.
5. Save the profile.

### 3.8.12 Rotating and Scaling Images

Follow these steps to automatically rotate or scale images.

1. In the Manage Scan Profiles screen, select the **Rotating/Scaling** option in the side pane.
2. Select the **Rotate Images** field or the **Scale Images** field.
3. In the **Rotate Images** fields, choose how you want images rotated. Specify a rotation for front and back sides, if needed.
4. In the **Scale Images** fields, specify a new image width and height. Images will be resized so that they fit within the boundaries of the new width and height.
5. Save the profile.

## 3.9 Testing Scan Profiles as a User

Follow these steps to scan or import using a selected scan profile. For details about batch scanning options, see the *User's Guide for Oracle Document Capture*.

1. In the Oracle Document Capture screen, click the **Batch Scanning** button on the main toolbar. The Batch Scanning screen is displayed.
2. In the **Profile** field, select a scan profile.
3. If a prefix is not displayed in the **Batch Name** field, enter a batch name.

4. Place the documents on the feeder tray of the scanner. Click the **Begin Scanning** button on the toolbar. Scan begins scanning the documents, adding to the batch until there are no more pages on the feeder tray. When done, the batch is added to the **Batch Name** list.
5. Click the **Review Batch** button and examine the batch in the Reviewing Batch screen. Click the **Page Information** button to activate a new screen that displays details about the selected image. Keeping this screen open is useful while creating or editing profiles. You can use it, for example, to monitor patch and bar code recognition and image file size.



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## Administering Scan for Adrenaline

This section contains the following topics:

- ["Adding a Scan Profile"](#) on page 4-1
- ["Deleting a Scan Profile"](#) on page 4-2
- ["Copying a Scan Profile"](#) on page 4-2
- ["Selecting a Scanner"](#) on page 4-2
- ["Importing Images"](#) on page 4-3
- ["Selecting Image Processing Settings"](#) on page 4-3
- ["Endorsing Scanned Documents"](#) on page 4-8
- ["Testing Scan Profiles as a User"](#) on page 4-8

### 4.1 Adding a Scan Profile

Follow these steps to add a Scan for Adrenaline profile.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the Manage Scan Profiles screen, click the **New** button. A new profile is displayed in the side pane.
3. In the **Profile Name** field, enter a name for the scan profile.
4. Specify how batches will be automatically named as they are created. (Skip this step if you want users to name batches.)
  - a. In the **Batch Prefix** field, type a prefix (up to eight characters) to be assigned to batches.
  - b. Select the **Auto Sequence** field.
5. In the **File Cabinet** field, select the file cabinet to which you want batches assigned.
6. In the **Task Description** field, enter instructions for the user scanning with this profile.
7. Select the **Scanner** tab. Select a scanner or disk source. See ["Selecting a Scanner"](#) on page 4-2 or ["Importing Images"](#) on page 4-3.
8. In the **File Type** field, specify how you want scanned images stored in Capture.

9. Click the **Image Processing** tab and select **settings (optional)**. Use the options on this tab to enhance scanned images. See "[Selecting Image Processing Settings](#)" on page 4-3.
10. Click the **Save** button.
11. Test the scan profile's settings. See "[Testing Scan Profiles as a User](#)" on page 4-8.

## 4.2 Deleting a Scan Profile

Follow these steps to remove a scan profile no longer in use. Deleting a scan profile does not affect batches previously scanned using the profile.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. From the side pane of the Manage Scan Profiles screen, select a profile to delete.
3. Click the **Delete** button, then confirm the deletion.

## 4.3 Copying a Scan Profile

Follow these steps to make a copy of a scan profile. This is useful for making variations to a scan profile while retaining the original.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select the scan profile you want to copy.
3. Click the **Copy** button. A duplicate of the profile is added to the side pane.
4. Select **settings** and save the profile.

## 4.4 Selecting a Scanner

Follow these steps to select a scanner and adjust its default settings.

1. Using the Kofax Source Manager (KSM), define a scanner source. Use the KSM (32-bit) icon in the Control Panel. Refer to your Kofax documentation for instructions on setting up a scanner source.

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**Note:** To use image processing settings, you must configure a scanner source with image processing.

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2. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
3. In the side pane of the Manage Scan Profiles screen, select a scan profile.
4. Click the **Scanner** tab.
5. Choose **Scanner** from the Scan Source options.
6. Click **Select Source**. In the Source field, select the scanner source you configured in step 1 and click OK. Scan initializes and reserves the device so that the scanner settings can be configured.
7. Click **Source Settings** and adjust the default scanner settings.

Available settings depend on the selected scanner. Scanner settings include such options as resolution, paper size, timeout, duplex, Auto Document Feeder (ADF), and contrast.

In general, set your scanner settings so they accommodate most of the documents being scanned using the selected scan profile. Scanning users can override a profile's scanner settings without changing the profile, then select the profile again at any time to reload the default profile settings.

## 4.5 Importing Images

Follow these steps to set a selected scan profile to import rather than scan images.

1. Using the Kofax Source Manager (KSM), define a disk source. Use the KSM (32-bit) icon in the Control Panel. Refer to your Kofax documentation for instructions on setting up a disk source. Scan supports multiple disk sources.

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**Note:** To use image processing settings with imported images, you must configure a disk source with image processing.

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2. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
3. In the side pane of the Manage Scan Profiles screen, select a scan profile.
4. Click the **Scanner** tab.
5. Choose **Disk** from the Scan Source options.
6. Click **Select Source**. In the Source field, select a disk source and click OK.
7. In the **Default Directory for File Import** field, specify an import directory. When users begin scanning, this path will be selected in the standard file dialog box that prompts users to select files to import.
8. Select the **Delete Files After Import** field to delete images after they are imported.

## 4.6 Selecting Image Processing Settings

Follow these steps to select image processing settings for scan profiles. These settings can make images easier to read, reduce file sizes and improve processing.

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**Note:** Image processing options require an Image Processing license from Kofax. Contact Kofax for more information.

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1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.
3. Click the **Image Processing** tab. Image processing options are displayed. A light bulb displays next to options enabled for this profile.
4. Select an image processing option and choose settings. Image processing options are provided for:
  - ["Straightening Skewed Images"](#) on page 4-4
  - ["Removing Speckles"](#) on page 4-4

- ["Enhancing Lines, Smoothing Characters and Removing Noise"](#) on page 4-4
- ["Removing Lines and Repairing Text"](#) on page 4-5
- ["Setting Patch Code Detection"](#) on page 4-6
- ["Removing Unwanted Shading"](#) on page 4-6
- ["Removing Streaks"](#) on page 4-7
- ["Removing Black Borders"](#) on page 4-7
- ["Setting Bar Code Detection"](#) on page 4-7

### 4.6.1 Straightening Skewed Images

Follow these steps to automatically straighten skewed images using the Deskew filter. Also see ["Deskew"](#) on page 11-23.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.
3. Click the **Image Processing** tab.
4. On the Image Processing tab, click **Deskew**. The Deskew Properties dialog box is displayed.
5. Select the **Enable** field.
6. Complete the settings.
7. Click **OK**. Save the profile.

### 4.6.2 Removing Speckles

Follow these steps to automatically remove speckles from images. Speckles are groups of black pixels surrounded by white pixels (or white pixels surrounded by black pixels). Also see ["Despeckle"](#) on page 11-24.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.
3. Click the **Image Processing** tab.
4. On the Image Processing tab, click **Despeckle**. The Despeckle Properties dialog box is displayed.
5. Select the **Enable** field.
6. Complete the settings.
7. Click **OK**. Save the profile.

### 4.6.3 Enhancing Lines, Smoothing Characters and Removing Noise

Follow these steps to set image filters for enhancing images. Also see ["Image Filters"](#) on page 11-25.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.

3. Click the **Image Processing** tab.
4. On the Image Processing tab, click **Image Filter**. The Image Filter Properties dialog box is displayed.
5. Select a filter and select the **Enable** field. The following filters are available:

Filter	Description
Character Smoothing	Smooths characters and lines. See " <a href="#">Character Smoothing</a> " on page 11-26.
Thinning Filter	Thins characters and lines and may remove background noise. See " <a href="#">Thinning Filter</a> " on page 11-27.
Thicken Filter	Thickens characters and lines and may exaggerate background noise. See " <a href="#">Thicken Filter</a> " on page 11-27.
Smooth and Clean	Smooths characters, removes background noise, and may eliminate lines. See " <a href="#">Smooth and Clean</a> " on page 11-27.
Fill Line Breaks	Fills in and smooths lines. See " <a href="#">Fill Line Breaks</a> " on page 11-28.
Smooth, Clean and preserve h-v lines	Smooths characters and lines and removes background noise. See " <a href="#">Smooth, Clean and Preserve H-V Lines</a> " on page 11-28.
Fill Line Breaks and preserve h-v lines	Fills in and smooths lines while maintaining the interline gap. See " <a href="#">Fill Line Breaks and Preserve H-V Lines</a> " on page 11-28.
Light Thicken	Thickens characters and lines and may exaggerate background noise, but is not as aggressive as the Thicken filter. See " <a href="#">Light Thicken Filter</a> " on page 11-29.
Outline	Extracts an outline of all image elements. See " <a href="#">Outline</a> " on page 11-29.

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**Note:** When using the image filters, it is recommended that you process a test image to determine the best settings for your file cabinet. The default settings, which have been calibrated for typical, real-world images, should work in most cases. If adjustments are necessary, they should be made carefully to achieve the desired results.

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6. Complete the settings.
7. Click **OK**. Save the profile.

#### 4.6.4 Removing Lines and Repairing Text

Follow these steps to automatically remove horizontal or vertical lines from images. The Line Removal feature can also repair text that intersects the lines that are removed. Removing lines and repairing characters improves the readability of images for OCR processing. Also see "[Line Removal](#)" on page 11-29.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.
3. Click the **Image Processing** tab.
4. On the Image Processing tab, click **Line Removal**. The Line Removal Properties dialog box is displayed.
5. Select the **Enable** field.
6. Complete the settings.
7. Click **OK**. Save the profile.

#### 4.6.5 Setting Patch Code Detection

Follow these steps to specify whether and how patch codes are detected during scanning. You can use patch codes detected during scanning in index profiles to separate documents. You can also use patch codes in scan profiles to stop the scanner, which can be useful for changing scanner settings between batches. Also see "[Patch Code](#)" on page 11-32.

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**Note:** As an alternative to using patch codes, you can specify that a bar code be interpreted as a patch code, as well as being used as a bar code. This can be useful if the first page of each document contains a bar code. See "[Setting Bar Code Detection](#)" on page 4-7 and "[Bar Codes Properties](#)" on page 11-39.

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1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.
3. Click the **Image Processing** tab.
4. On the Image Processing tab, click **Patch Code**. The Patch Code Properties dialog box is displayed.
5. Select the **Enable** field.
6. Complete the settings.
7. Click **OK**. Save the profile.

#### 4.6.6 Removing Unwanted Shading

Follow these steps to automatically remove unwanted shaded areas from images. Also see "[Deshade Properties](#)" on page 11-35.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.
3. Click the **Image Processing** tab.
4. On the Image Processing tab, click **Deshade**. The Deshade Properties dialog box is displayed.
5. Select the **Enable** field.

6. Complete the settings.
7. Click **OK**. Save the profile.

#### 4.6.7 Removing Streaks

Follow these steps to automatically remove streaks from images. Also see "[Streak Removal](#)" on page 11-37.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.
3. Click the **Image Processing** tab.
4. On the Image Processing tab, click **Streak Removal**. The Streak Properties dialog box is displayed.
5. Select the **Enable** field.
6. Complete the settings.
7. Click **OK**. Save the profile.

#### 4.6.8 Removing Black Borders

Follow these steps to automatically remove black borders from images. Also see "[Black Border](#)" on page 11-38.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.
3. Click the **Image Processing** tab.
4. On the Image Processing tab, click **Black Border**. The Black Border Properties dialog box is displayed.
5. Select the **Enable** field.
6. Complete the settings.
7. Click **OK**. Save the profile.

#### 4.6.9 Setting Bar Code Detection

Follow these steps to specify whether and how bar codes are detected during scanning. You can use bar code values detected during scanning in index profiles to separate documents or to assign to index fields. Also see "[Bar Codes Properties](#)" on page 11-39.

1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.
3. Click the **Image Processing** tab.
4. On the Image Processing tab, click **Bar Code**. The Bar Code Properties dialog box is displayed.
5. Select the **Enable** field.
6. Complete the settings.

7. Click **OK**. Save the profile.

## 4.7 Endorsing Scanned Documents

Follow these steps to set automatic imprinting of images as they are scanned.

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**Note:** To use endorsing, you must have an endorsing-capable scanner supported by the Kofax engine. Some scanners support automatic endorsing, while others support manual endorsing or both. The scanner determines the available endorsing options. Refer to your scanner documentation for more information.

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1. In the Oracle Document Capture screen, click the **Manage Scan Profiles** button on the toolbar.
2. In the side pane of the Manage Scan Profiles screen, select a scan profile.
3. Click the **Endorsing** tab.
4. Select **Automatic Endorsing** or **Manual Endorsing**.
5. Click **Configure**.
6. If you selected manual endorsing, configure manual options.
  - a. Type the text you want displayed on each page.
  - b. Select the fields corresponding to items you want displayed with the endorsement.
7. If you selected automatic endorsing, configure automatic options.
  - a. Select **Automatic Annotation** and **Endorser** options.
  - b. Set text definition settings.
  - c. Set font settings.
  - d. Set **Counter Increment** settings.
  - e. Set **Counter Reset** options.

## 4.8 Testing Scan Profiles as a User

Follow these steps to scan or import documents using a selected scan profile. For details about batch scanning options, see the *User's Guide for Oracle Document Capture*.

1. In the Oracle Document Capture screen, click the **Batch Scanning** button on the toolbar. The Batch Scanning screen is displayed.
2. In the **Profile** field, select a scan profile.
3. If a prefix is not displayed in the **Batch Name** field, enter a batch name.
4. Place the documents on the feeder tray of the scanner.
5. Click the **Begin Scanning** button on the toolbar. Scan begins scanning the documents, adding to the batch until there are no more pages on the feeder tray. When done, the batch is added to the Batch Name list.
6. Click the **Review Batch** button and examine the batch in the Reviewing Batch screen. Click the Page Information button to activate a new screen that displays details about the selected image. Keeping this screen open is useful while creating

or editing profiles. You can use it, for example, to monitor patch and bar code recognition and image file size.



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## Administering Index

This section covers the following topics:

- ["Adding an Index Profile"](#) on page 5-1
- ["Deleting an Index Profile"](#) on page 5-2
- ["Filtering the Batch Indexing List Displayed to Users"](#) on page 5-2
- ["Activating a Database Lookup for an Index Field"](#) on page 5-2
- ["Setting Index Field Properties"](#) on page 5-3
  - ["Setting Up Sticky Index Fields"](#) on page 5-3
  - ["Applying an Input Mask to an Index Field"](#) on page 5-4
  - ["Setting Up a Pick-list Index Field"](#) on page 5-4
  - ["Setting Up Parent/Child Pick-list Index Fields"](#) on page 5-5
  - ["Applying Bar Codes Values Detected During Scanning to Index Fields"](#) on page 5-5
  - ["Changing an Index Field's Format"](#) on page 5-6
  - ["Setting Up Bar Code or Patch Code Separator Sheet Indexing"](#) on page 5-6
  - ["Setting Index Fields to Auto Populate"](#) on page 5-7
- ["Setting Up Zone Highlighting and OCR"](#) on page 5-7
- ["Testing an Index Profile as a User"](#) on page 5-8

### 5.1 Adding an Index Profile

Follow these steps to add an index profile.

1. In the Oracle Document Capture screen, click the **Manage Index Profiles** button on the main toolbar.

The Manage Index Profiles screen is displayed.

2. Click the **New** button.

A new index profile is added to the side pane.

3. On the **General** tab, enter a new profile name in the **Profile Name** field.
4. In the **Task Description** field, enter instructions for the user scanning with this profile.

5. In the **File Cabinet** field, select the file cabinet to which you want batches assigned.
6. On the **Fields** tab, select and order the index fields to display to users.
7. Select other profile settings as needed.
8. Save and close the profile.
9. To use zone highlighting and OCR in the index profile, open the **Zone Editor**, select the index profile and configure settings.  
See "[Setting Up Zone Highlighting and OCR](#)" on page 5-7.

## 5.2 Deleting an Index Profile

Follow these steps to remove an index profile no longer in use. Deleting an index profile does not affect batches previously scanned using the profile.

1. In the Oracle Document Capture screen, click the **Manage Index Profiles** button on the main toolbar.
2. In the **Index Profiles** field of the Manage Scan Profiles screen, select a profile to delete.
3. Click the **Delete** button, then confirm the deletion.

## 5.3 Filtering the Batch Indexing List Displayed to Users

Follow these steps to limit the batches displayed to users in the Batch Indexing screen for a selected profile.

1. In the Oracle Document Capture screen, click the **Manage Index Profiles** button on the toolbar.
2. In the Manage Index Profiles screen, click the **Filter** tab.
3. Specify settings for the batches you want displayed to users.
  - Between filters, users see batches that meet all selected filters only (AND condition). If you specify a batch prefix and status, only batches with that batch prefix and status are displayed.
  - Within a filter, users see batches that meet any selections (OR condition). If you select 1, 2 and 3 in the Priority option, batches with an assigned priority of 1, 2 or 3 will be displayed.
4. Save the profile.

## 5.4 Activating a Database Lookup for an Index Field

Follow these steps to apply a database lookup to an index profile.

1. In Capture Administration, create a database lookup profile.  
The database lookup identifies the external database to connect to and the fields to search and return when indexing users activate a database lookup.  
See "[Adding a Database Lookup](#)" on page 9-11.
2. In the Manage Index Profiles screen, select an index profile.
3. In the **Database Lookup Profile** field on the **General** tab, select the database lookup you created in step 1.

4. Select the **Always display hit list** field to display a hit list containing possible matching values whenever the user activates a database lookup.  
When deselected (the default), Capture displays a hit list only when more than one database record is found.
5. Save and close the profile.
6. Click the **Batch Indexing** button in the Oracle Document Capture screen and test the index field's database lookup as a user.

## 5.5 Setting Index Field Properties

When creating an index profile, you can assign properties to a selected index field. See ["Setting Index Field Properties"](#) on page 5-3. This section covers the following topics:

- ["Setting Up Sticky Index Fields"](#) on page 5-3
- ["Applying an Input Mask to an Index Field"](#) on page 5-4
- ["Setting Up a Pick-list Index Field"](#) on page 5-4
- ["Setting Up Parent/Child Pick-list Index Fields"](#) on page 5-5
- ["Applying Bar Codes Values Detected During Scanning to Index Fields"](#) on page 5-5
- ["Changing an Index Field's Format"](#) on page 5-6
- ["Setting Up Bar Code or Patch Code Separator Sheet Indexing"](#) on page 5-6
- ["Setting Index Fields to Auto Populate"](#) on page 5-7

### 5.5.1 Setting Up Sticky Index Fields

Follow these steps to identify index fields as sticky, so that when users move to an adjacent page, the value they applied to the field is automatically applied to the same field (if blank). In a common scenario, all fields are set as sticky; a user enters values on the document's first page, then quickly views each remaining document page as values are automatically applied.

See ["Sticky Index Fields"](#) on page 1-15.

1. In the Manage Index Profiles screen, select an index profile in the side pane.
2. Click the **Field Properties** tab.
3. From the **Selected Index Fields** options, select the field you want to make sticky.  
Fields must be selected for display on the Fields tab to be available on the Field Properties tab.
4. Select the **Sticky** field.
5. If the **When** field, specify when you want the field sticky.  
The choices are ordered from most restrictive to least.
6. Click the **Options** tab. If needed, select the **Allow auto populated field(s) to index page** field.  
Autopopulated fields can affect whether a page is considered indexed and therefore whether a field is sticky.
7. Save and close the profile.

8. Click the **Batch Indexing** button in the Oracle Document Capture screen and test sticky index fields as a user.

Note that sticky fields are applied only when users navigate using the **Next Page** or **Previous Page** toolbar buttons, and not when using thumbnails or typing page numbers in the **Goto Page** field.

## 5.5.2 Applying an Input Mask to an Index Field

Follow these steps to set up an index field with an input mask that controls what users can enter into the field. If the user types a character that does not conform to the mask, the system beeps and the program does not accept it.

1. In the Manage Index Profiles screen, click the **Field Properties** tab.
2. From the **Selected Index Fields** options, select the field to which to apply a mask.  
Fields must be selected for display on the Fields tab to be available on the Field Properties tab.
3. In the **Field Validation Options** field, choose **Input Mask**.
4. In the **Input Mask** field, enter any of the available mask characters (listed in "[Input Mask Characters](#)" on page 11-53).  
Any other characters you type are displayed exactly as typed.
5. Save and close the profile.
6. Click the **Batch Indexing** button in the Oracle Document Capture screen and test the index field's mask as a user.

## 5.5.3 Setting Up a Pick-list Index Field

Follow these steps to set up an index field with a pick-list. When the user selects the index field, a pick-list providing two or more values from which to choose displays. You can also use parent/child pick-lists, as described in "[Setting Up Parent/Child Pick-list Index Fields](#)" on page 5-5. Also see "[Pick-list Index Fields](#)" on page 1-15.

1. In Capture Administration, create a pick-list.  
It can be a Capture native or database pick-list. See "[Working With Pick-lists](#)" on page 9-6.
2. In the Manage Index Profiles screen, click the **Field Properties** tab.
3. From the **Selected Index Fields** options, select the field to which to apply a pick-list.
4. Select **Pick-list** in the **Field Validation Options** field. Pick-list options become available.
5. Select the **Case Insensitive** field to disregard case when users match pick-list items using the autocomplete feature.  
If this field is deselected, users must use the same case when typing the first few characters of a pick-list item.
6. In the **Pick-list Source** field, select **Capture Native Pick-list** if using a Capture pick-list. If using a database pick-list, choose the database pick-list source.
7. In the **Pick-list** field, select the pick-list to display.
8. Save and close the profile.

9. Click the **Batch Indexing** button in the Oracle Document Capture screen and test the index field's pick-list as a user.

### 5.5.4 Setting Up Parent/Child Pick-list Index Fields

Follow these steps to set up index fields with linked pick-lists. In a parent/child relationship, a parent field is linked to two or more child pick-lists, one of which is displayed after the user makes a selection in the parent field. See "[Linked Pick-list Index Fields](#)" on page 1-15.

1. In Capture Administration, create two or more pick-lists. Create a pick-list relationship profile that links them.  
See "[Working With Pick-lists](#)" on page 9-6.
2. In the Manage Index Profiles screen, click the **General** tab. In the **Pick-list Relationship Profile** field, select the profile you created in step 1.
3. Click the **Field Properties** tab.
4. Configure the parent field.
  - a. Select the parent field in the **Selected Index Fields** field.
  - b. Select **Pick-list** in the **Field Validation Options** field.
  - c. Select the parent's source in **Pick-list Source** field.
  - d. Select the parent's pick-list in the **Pick-list** field.
5. Configure the child field.
  - a. Select the child field in the **Selected Index Fields** field.
  - b. Select **Pick-list** in the **Field Validation Options** field.
  - c. Select the parent's index field in the **Parent** field.
6. Save and close the profile.
7. Click the **Batch Indexing** button in the Oracle Document Capture screen and test the index fields' pick-lists as a user.

### 5.5.5 Applying Bar Codes Values Detected During Scanning to Index Fields

Follow these steps to automatically apply bar code values Scan detects to a selected index field during the display of the corresponding page. If a page contains more than one bar code, Index displays their values in a pick-list to the indexing user.

1. In a scan profile, configure bar code detection.

For Scan for ISIS, see "[Setting Bar Code Detection](#)" on page 3-4. For Scan for Adrenaline, see "[Setting Bar Code Detection](#)" on page 4-7.

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**Note:** Index does not perform digital bar code recognition. Instead, it relies on bar codes recognized by either Scan or the Recognition Server.

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2. In the Manage Index Profiles screen, click the **Field Properties** tab.
3. From the **Selected Index Fields** option, select the field to which to apply a bar code value.
4. In the **Field Validation Options** field, choose **Bar Code Field**.

5. Save and close the profile.
6. Click the **Batch Indexing** button in the Oracle Document Capture screen. Test the bar code detection and index field value as a user.

### 5.5.6 Changing an Index Field's Format

Follow these steps to set up an index field with an input format. When the user moves to another index field, Index changes the data if needed to match the specified input format. See ["Index Fields That Format Input Values"](#) on page 1-15.

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**Note:** You can also change the case of index entries using the Case Format field on the Field Properties tab.

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1. In the Manage Index Profiles screen, click the **Field Properties** tab.
2. From the **Selected Index Fields** options, select the field to which to apply an input format.  
  
Fields must be selected for display on the **Fields** tab to be available on the **Field Properties** tab.
3. In the Field Validation Options field, choose **Input Format**.
4. In the **Input Format** field, select or type an input format (listed in [Table 11-3, "Input Formats"](#)).  
  
You can create custom character or numeric formats. See [Table 11-4, "Custom Input Formats"](#).
5. Save and close the profile.
6. Click the **Batch Indexing** button in the Oracle Document Capture screen and test the index field's input format as a user.

### 5.5.7 Setting Up Bar Code or Patch Code Separator Sheet Indexing

Follow these steps to configure an index profile to use separator sheets. Scanning with separator sheets allows indexing users to enter index values once for each field, apply those values to all pages in the document, and then jump to the start of the next document (the separator sheet). See ["About Indexing Using Separator Sheets"](#) on page 1-16.

1. In Scan, configure a scan profile that uses patch code or bar code detection.  
  
For Scan for ISIS, see ["Setting Bar Code Detection"](#) on page 3-4 or ["Detecting Patch Codes"](#) on page 3-5. For Scan for Adrenaline, see ["Setting Bar Code Detection"](#) on page 4-7 or ["Setting Patch Code Detection"](#) on page 4-6.
2. Scan one or more batches containing separator sheets between documents.
3. In the Manage Index Profiles screen, click the **Separator Sheet** tab.
4. Select the **Use Separator Sheets to Determine Documents** field.
5. Configure the patch code or bar code.
  - To use a patch code, choose **Patch Code** from the Separation Methods options and choose the patch code type from the Patch Code Value field.

- To use a bar code, choose **Bar Code** from the Separation Methods options. To use a specific bar code value as a separator sheet detector (optional), enter a value in the Bar Code Value field.
- 6. Select **Separator Options** settings.
- 7. Save and close the profile.
- 8. Click the **Batch Indexing** button in the Oracle Document Capture screen and test separator sheet indexing for the profile as a user.

### 5.5.8 Setting Index Fields to Auto Populate

Follow these steps to configure an index profile to automatically fill (populate) selected index fields with certain values. See "[Auto Populating Index Fields](#)" on page 1-15.

1. In the Manage Index Profiles screen, click the **Auto Populate** tab.
2. From the **Available Fields** option, select an index field to auto populate.  
You can populate any field defined for the file cabinet, not just those selected for display to the user on the Field Properties tab.
3. In the **Settings** field, select an auto populate value.  
The options available depend on the data type of the field you selected.
4. Save and close the profile.
5. Click the **Batch Indexing** button in the Oracle Document Capture screen and test the index field set for auto populate as a user.

## 5.6 Setting Up Zone Highlighting and OCR

Follow these steps to configure zone highlighting and Optical Character Recognition (OCR) for a selected index profile. The zone feature displays an outlined turquoise-colored box on images, aiding users in indexing. Users can turn zone display on or off. OCR captures text within a zone (or any area in which a user clicks and drags) and inserts it into an index field. See "[About Indexing With Zones and OCR](#)" on page 1-17.

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**Note:** It is important that users verify OCR entries, since it can result in inaccurate values.

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1. In the Oracle Document Capture screen, click the **Zone Editor** button on the toolbar.  
The Zone Editor is displayed.
2. In the **Profile** field, select an index profile to which to assign zones and OCR.
3. On the Zone Editor toolbar, click the **Open Image File** button, select a template image for setting up zones, and click **Open**.  
The image file must be saved in TIFF, BMP, or JPG format. Its resolution should be the same as the resolution used at scan time.  
The image is displayed.
4. From the **Available Fields** list in the side pane, select the index field for which you want to create a zone.

5. Click the **Create Zone** button on the Zone Editor toolbar.
6. Click and drag a box on the image to define a zone for the selected index field.  
When you release, the zone turns yellow.
7. If needed, move the zone by clicking and dragging it. To resize it, select it and drag one of its handles.
8. To turn on OCR for the selected field, click the **OCR Field** button on the Zone Editor toolbar.  
Index performs zonal OCR on an image only if it is not indexed (does not contain values in any of its index fields).
9. To set up zones for additional index fields, repeat steps 4 through 8. (The current zone is displayed yellow; other zones are displayed in turquoise.)
10. Click **Save** on the Zone Editor toolbar.  
The image is saved with the index profile, allowing you to edit zones later.

## 5.7 Testing an Index Profile as a User

Follow these steps to index using a selected index profile. For details about batch indexing options, see the *User's Guide for Oracle Document Capture*.

1. In the Oracle Document Capture screen, click the **Batch Indexing** button on the main toolbar.  
The Batch Indexing screen is displayed.
2. In the **Available Index Profiles** field, select an index profile.
3. From the list of batches, select a batch and click **Select**.  
To search for a specific batch, click **Search** and specify search criteria.  
The batch is displayed in the Indexing screen.
4. Complete the index fields.  
Click the **Page Information** button to activate a new screen that displays details about the selected image. Keeping this screen open is useful while creating or editing profiles. You can use it, for example, to monitor image file size, and to determine whether pages are indexed and bar codes and patch codes are recognized.

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# Administering Commit Server

This section covers these topics:

- ["Starting, Pausing and Activating the Commit Server"](#) on page 6-1
- ["Configuring Settings"](#) on page 6-1
- ["Working With Batch Jobs"](#) on page 6-3
- ["Scheduling Processing"](#) on page 6-5
- ["Maintaining Commit Server"](#) on page 6-5

For background information about Commit Server, see ["About Commit Server"](#) on page 1-18.

## 6.1 Starting, Pausing and Activating the Commit Server

1. Start the Commit Server from the list of programs on the Start menu.  
Commit Server starts in an active state if there are scheduled jobs. However, Commit Server does not begin processing jobs for one minute, allowing you to pause the server if you do not want it to process any scheduled jobs.
2. Activate or pause the server as needed.  
Choose **Pause** on the Server menu to make changes to settings or batch jobs.  
Choose **Activate** on the Server menu to enable scheduled batch jobs to process.

## 6.2 Configuring Settings

This section covers the following topics:

- ["Setting Up Unattended Login"](#) on page 6-1
- ["Setting Up Email Notification for Processing Errors"](#) on page 6-2
- ["Setting Up Error Logging"](#) on page 6-2
- ["Running Commit Server as a Service"](#) on page 6-2

### 6.2.1 Setting Up Unattended Login

Follow these steps to specify a login user name and password so Commit Server will start up without requiring login information.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.

3. On the Login tab, select the **Unattended Login** field.
4. Enter a username and password for login.  
If you selected Windows domain security as your security model, use the format \\domain\userID in the **User ID** field (for example, \\domain2\jdoe) to specify the domain along with the user name. For unattended login, the user must be added as an individual Capture user. See "[Add User or Group Screen \(Windows Domain Security\)](#)" on page 13-57.
5. Activate the server by choosing **Activate** from the Server menu.

## 6.2.2 Setting Up Email Notification for Processing Errors

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the Email tab, select the **Send On Error** field.
4. Specify email server and authorization settings.
5. Identify email recipients, separating multiple email addresses with a semicolon (;).
6. Click the **Test Email** button to send an email message that tests the settings.
7. Activate the server by choosing **Activate** from the Server menu.

## 6.2.3 Setting Up Error Logging

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the **Error Log** tab, specify where you want error logs written in the Log File Path field.
4. Complete other settings on the **Error Log** tab.
5. Activate the server by choosing **Activate** from the Server menu.

## 6.2.4 Running Commit Server as a Service

Also see "[Guidelines For Running Servers as Services](#)" on page 12-56.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the **Login** tab, specify unattended login options.
4. On the **Services** tab, specify the number of seconds (30-900) to wait for the service to shut down normally.
5. Open the Services applet from **Administrative Tools** in the Control Panel.
6. Select the **Oracle Document Capture Commit Service**, right-click and choose **Properties**.
7. On the General tab, change the Startup Type to **Automatic**.
8. On the **Properties Log On** tab, configure a logon account for a user with rights to access network resources.

This is needed only if the service will access network resources, such as sending emails on error conditions or committing to a network location.

## 6.3 Working With Batch Jobs

This section covers these topics:

- ["Adding Batch Jobs"](#) on page 6-3
- ["Deleting Batch Jobs"](#) on page 6-3
- ["Activating Commit Server in a Scan Profile"](#) on page 6-4
- ["Activating Commit Server in an Index Profile"](#) on page 6-4
- ["Activating Commit Server in a Recognition Server Batch Job"](#) on page 6-4
- ["Activating Commit Server in an Import Server Batch Job"](#) on page 6-4

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**Note:** Changes you make to a selected batch job affect all scheduled events that use the batch job.

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### 6.3.1 Adding Batch Jobs

To process one or all file cabinets without special settings, schedule processing without creating a batch job, as described in ["Adding an Event"](#) on page 6-5. Otherwise, follow these steps to add a batch job.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Batch Jobs** from the Setup menu.
3. Click **New**.  
A default batch job name of <Batch Job 1> displays in the **Batch Jobs** and **Name** fields.
4. Enter a batch name in the **Name** field.  
You can type up to 50 alphanumeric characters, including spaces.
5. On the **General** tab, select the file cabinets whose batches you want the job to process.
6. On the **Batch Criteria** tab, optionally limit the batches to be processed based on batch prefix or status.
7. On the **Processing Order** tab, optionally specify if and how batches will be sorted before processing.
8. Click **Save** to save the batch job.

### 6.3.2 Deleting Batch Jobs

Follow these steps to delete batch jobs that are no longer used.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Batch Jobs** from the Setup menu.  
The Batch Job dialog box is displayed.
3. In the Batch Jobs dialog box, select the batch job you want to delete from the **Batch Jobs** field.
4. Click **Delete** to remove the batch job, then confirm the deletion.

### 6.3.3 Activating Commit Server in a Scan Profile

In order for Commit Server to process batches, their scan profile must be set to use Commit Server.

1. From the Scan Administration screen, select a scan profile in the left pane.
2. Under the General Options, select **3 - Commit Using Commit Server** from the Commit Method field.
3. Save the profile.

When a user sends batches after indexing with this profile, the batches will be marked for committing by a scheduled Commit Server job.

### 6.3.4 Activating Commit Server in an Index Profile

In order for Commit Server to process batches after indexing, their index profile must be set to use Commit Server.

1. In the Capture screen, choose **Manage Index Profiles** from the Indexing menu.
2. In the left pane, select an indexing profile.
3. On the Options tab, select the **Use Commit Server** field.
4. Save the profile.

When a user clicks **Commit** after indexing with this profile, the workstation will be immediately available for indexing, and the batch will be marked for committing by a scheduled Commit Server job.

### 6.3.5 Activating Commit Server in a Recognition Server Batch Job

Follow these steps to set the Recognition Server batch job to commit batches using Commit Server. When set to use Commit Server, Recognition Server marks each batch as ready to be committed by Commit Server after bar code recognition, instead of actually committing it.

1. If needed, pause the Recognition Server by choosing **Pause** from the Server menu.
2. Choose **Batch Jobs** from the Setup menu.
3. In the **Batch Jobs** field, select the job.
4. On the General tab, select the **Use Commit Server** field.
5. Save the batch job.

### 6.3.6 Activating Commit Server in an Import Server Batch Job

Follow these steps to set the Import Server batch job to commit batches using Commit Server. When set to use Commit Server, Import Server marks each batch as ready to be committed by Commit Server after importing, instead of actually committing it.

1. If needed, pause the Import Server by choosing **Pause** from the Server menu.
2. Choose **Batch Jobs** from the Setup menu.
3. In the left pane, select the provider.
4. In the right pane, double-click the job.
5. On the Processing tab, select the **Commit Batches** and **Use Commit Server** fields.
6. Save the batch job.

## 6.4 Scheduling Processing

This section covers the following topics:

- ["Adding an Event"](#) on page 6-5
- ["Deleting Events"](#) on page 6-5

### 6.4.1 Adding an Event

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Schedule** from the Server menu.
3. Click **Schedule Event**.
4. In the **Event** field, select the batch job or file cabinet you want the event to process. You can choose a previously added batch job, a file cabinet, or all file cabinets.
5. In the **Frequency** field, select how often you want the job processed.
6. If you selected a frequency of **Once**, **Every Day**, or **Every Week**, specify frequency details.
7. Click **OK**, then **Close**.
8. Activate the Commit Server by choosing **Activate** from the Server menu.
9. Once processing begins, view statistics and error log messages in the Commit Server main screen.

### 6.4.2 Deleting Events

Follow these steps to stop an event from processing.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Schedule** from the Server menu.
3. Select the event you want to delete, click **Remove Event**, and confirm the deletion.

## 6.5 Maintaining Commit Server

This section covers these topics:

- ["Deleting Old Log Files"](#) on page 6-5
- ["Shutting Down and Restarting Commit Server"](#) on page 6-6

Commit Server audits certain activities and saves the information in the ecAudit table of the Capture batch database. For more information about audit activities and tables, see ["Auditing in Oracle Document Capture"](#) on page 14-1.

### 6.5.1 Deleting Old Log Files

Follow these steps to schedule clearing out old log files using the predefined Delete Old Log Files event.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu and click the Error Log tab.
3. Select the **Delete Old Log Files** field.

4. In the **Days to Retain Log Files** field, enter the number of days you want to keep log files. Click **OK**.
5. Choose **Schedule** from the Server menu.
6. Click **Schedule Event**.
7. In the Event field, choose **Delete Old Log Files**.
8. In the **Event Properties** fields, select how often you want to delete old log files.
9. Click **OK**, then **Close**.

## 6.5.2 Shutting Down and Restarting Commit Server

Follow these steps to schedule shutting down Commit Server using the predefined Shut Down event.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Schedule** from the Server menu.
3. Click **Schedule Event**.
4. In the Event field, choose **Shut Down**.
5. Click **OK**, then **Close**.

As an option, use the Microsoft Task Scheduler to restart Commit Server. To prevent Commit Server from displaying a login screen, make sure unattended login settings are selected, as described in "[Setting Up Unattended Login](#)" on page 6-1.

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# Administering Recognition Server

This section covers these topics:

- ["Starting, Pausing and Activating the Recognition Server"](#) on page 7-1
- ["Configuring Recognition Server"](#) on page 7-1
- ["Working With Batch Jobs"](#) on page 7-3
- ["Scheduling Processing"](#) on page 7-5
- ["Maintaining Recognition Server"](#) on page 7-5

For background information about Recognition Server, see ["About Recognition Server"](#) on page 1-19.

## 7.1 Starting, Pausing and Activating the Recognition Server

1. Start the Recognition Server from the list of programs on the Start menu.

Recognition Server starts in an active state if there are scheduled jobs. However, Recognition Server does not begin processing jobs for 30 seconds, allowing you to pause the server if you do not want it to process any scheduled jobs.

2. Activate or pause the server as needed.

Choose **Pause** on the Server menu to make changes to settings or batch jobs.  
Choose **Activate** on the Server menu to enable scheduled batch jobs to process.

## 7.2 Configuring Recognition Server

This section covers the following topics:

- ["Setting Up Unattended Login"](#) on page 7-1
- ["Setting Up Email Notification for Processing Errors"](#) on page 7-2
- ["Setting Up Activity Logging"](#) on page 7-2
- ["Running Recognition Server as a Service"](#) on page 7-2

See ["About Recognition Server"](#) on page 1-19 for more information.

### 7.2.1 Setting Up Unattended Login

Follow these steps to specify a login user name and password so Recognition Server will start up without requiring login information.

1. If needed, pause the server by choosing **Pause** from the Server menu.

2. Choose **General Settings** from the Setup menu.
3. On the Login tab, select the **Unattended Login** field.
4. Enter a username and password for login.

If you selected Windows domain security as your security model, use the format \\domain\userID in the User ID field (for example, \\domain2\jdoe) to specify the domain along with the user name. For unattended login, the user must be added as an individual Capture user. See ["Add User or Group Screen \(Windows Domain Security\)"](#) on page 13-57.

5. Activate the server by choosing **Activate** from the Server menu.

## 7.2.2 Setting Up Email Notification for Processing Errors

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the Email tab, select the **Send On Error** field.
4. Specify email server and authorization settings.
5. Identify email recipients, separating multiple email addresses with a semicolon (;).
6. Click the **Test Email** button to send an email message that tests the settings.
7. Activate the server by choosing **Activate** from the Server menu.

## 7.2.3 Setting Up Activity Logging

Follow these steps to specify how Recognition Server activity is logged and the number of days log files are retained. You specify the log file path in the batch jobs options, as described in ["Adding Batch Jobs"](#) on page 7-3.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the **Log** tab, complete log file settings.
4. Activate the server by choosing **Activate** from the Server menu.

## 7.2.4 Running Recognition Server as a Service

Also see ["Guidelines For Running Servers as Services"](#) on page 12-56.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the **Login** tab, specify unattended login options.  
See ["Setting Up Unattended Login"](#) on page 7-1.
4. On the **Services** tab, specify the number of seconds (30-900) to wait for the service to shut down normally. Click **OK**.
5. Open the Services applet from **Administrative Tools** in the Control Panel.
6. Select the **Oracle Document Capture Commit Service**, right-click and choose **Properties**.
7. On the **General** tab, change the Startup Type to **Automatic**.

8. On the **Properties Log On** tab, configure a logon account for a user with rights to access network resources.

This is needed only if the service will access network resources, such as sending emails on error conditions or committing to a network location.

## 7.3 Working With Batch Jobs

This section covers these topics:

- ["Adding Batch Jobs"](#) on page 7-3
- ["Deleting Batch Jobs"](#) on page 7-3
- ["Adding Bar Code Definitions"](#) on page 7-4
- ["Using a Bar Code Value to Search a Database and Assign Index Values"](#) on page 7-4

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**Note:** Changes you make to a selected batch job affect all scheduled events that use the batch job.

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### 7.3.1 Adding Batch Jobs

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Batch Jobs** from the Setup menu.
3. Click **New**.

A default batch job name of <Batch Job 1> displays in the Batch Jobs and Batch Job Name fields.

4. In the **Batch Job Name** field, enter a new name.
5. Select settings on the **General** and **Processing** tabs.
6. On the **Bar Code Recognition** tab, identify the bar code types (symbolologies) you want the batch job to detect.

You can also detect patch codes.

7. On the **Bar Codes** tab, add bar code definitions.  
See ["Adding Bar Code Definitions"](#) on page 7-4.
8. On the **Fields** tab, set bar codes or other values to autopopulate Capture index fields.
9. On the **Database Lookup** tab, optionally configure a database lookup.

See ["Using a Bar Code Value to Search a Database and Assign Index Values"](#) on page 7-4.

10. To test the batch job's settings, select the **Test Mode** field on the **General** tab.  
This allows you to test bar code settings without committing or having to re-scan batches. You can examine the log file to observe server activity.
11. Click **Save** to save the batch job.

### 7.3.2 Deleting Batch Jobs

Follow these steps to delete batch jobs that are no longer used.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Batch Jobs** from the Setup menu.  
The Batch Job dialog box is displayed.
3. In the Batch Jobs dialog box, select the batch job you want to delete from the **Batch Jobs** field.
4. Click **Delete** to remove the batch job, then confirm the deletion.

### 7.3.3 Adding Bar Code Definitions

A bar code definition identifies a bar code by its characteristics, such as length in characters. As bar codes are recognized, they are assigned to a bar code definition based on their data characteristics.

1. On the **Bar Codes** tab of the Batch Job Settings screen, click the tab's **New** button (not the screen's New button).
2. In the **Description** field, type a name for the bar code definition (for reference only).
3. In the **Validation Rule** field, specify how Recognition Server should validate the bar code: by its length, using a mask, or from a pick-list created in Capture Administration.

After you select a rule, additional value field are displayed (Length for length-type validation, Mask for mask-type validation and pick-list fields for pick-list validation).

4. In the value field, specify validation values for the selected type.

If specifying an input mask, enter a mask that describes the bar code value in the Mask field displayed. A recognized bar code will be assigned to this bar code definition if the value meets the requirements of the mask you specify. Available mask characters are listed in [Table 12-1](#).

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**Note:** Be sure not to set up bar codes that conflict, such as two bar codes with the same length in characters. If necessary, consider using a macro to use business logic to assign bar codes.

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5. Click the tab's **Save** button.

### 7.3.4 Using a Bar Code Value to Search a Database and Assign Index Values

Follow these steps to use a database lookup previously created in Capture Administration in a Recognition Server batch job.

1. Create the database lookup profile in Capture Administration.  
See "[Adding a Database Lookup](#)" on page 9-11.
2. On the **Bar Codes** tab, add a bar code definition.  
See "[Adding Bar Code Definitions](#)" on page 7-4.
3. On the **Database Lookup** tab, choose **Bar Code** in the Using field.
4. In the **Description** field, select the bar code definition you created in step 2.
5. In the **Database Lookup Profile** field, select the database lookup profile you created in step 1.

6. In the **Database Search** Field, select a search field from those defined in the database lookup profile.

When the batch job runs, Recognition Server will search this field for a value that matches the bar code value. If a match is found, it will populate the other fields.

7. In the **Database Lookup** tab's lower portion, select other search options.
8. Test the database lookup.

Schedule and activate the batch job, then view its results in Index. Ensure that the specified index fields were populated correctly.

## 7.4 Scheduling Processing

This section covers the following topics:

- ["Adding an Event"](#) on page 7-5
- ["Deleting Events"](#) on page 7-5

### 7.4.1 Adding an Event

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Schedule** from the Server menu.
3. Click **Schedule Event**.
4. In the **Event** field, select the batch job or file cabinet you want the event to process.  
You can choose a previously added batch job, a file cabinet, or all file cabinets.
5. In the **Frequency** field, select how often you want the job processed.
6. If you selected a frequency of **Once**, **Every Day**, or **Every Week**, specify frequency details.
7. Click **OK**, then **Close**.
8. Activate the Recognition Server by choosing **Activate** from the Server menu.
9. Once processing begins, view statistics and error log messages in the Recognition Server main screen.

### 7.4.2 Deleting Events

Follow these steps to stop an event from processing.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Schedule** from the Server menu.
3. Select the event you want to delete, click **Remove Event**, and confirm the deletion.

## 7.5 Maintaining Recognition Server

This section covers these topics:

- ["Deleting Old Log Files"](#) on page 7-6
- ["Shutting Down and Restarting Recognition Server"](#) on page 7-6

Recognition Server audits certain activities and saves the information in the ecAudit table of the Capture batch database. For more information about audit activities and tables, see "[Auditing in Oracle Document Capture](#)" on page 14-1.

### 7.5.1 Deleting Old Log Files

By default, Recognition Server creates log files daily that track its activities. Follow these steps to schedule clearing out old log files using the predefined Delete Old Log Files event.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu and click the Error Log tab.
3. Select the **Delete Old Log Files** field.
4. In the **Days to Retain Log Files** field, enter the number of days you want to keep log files. Click **OK**.
5. Choose **Schedule** from the Server menu.
6. Click **Schedule Event**.
7. In the **Event** field, choose **Delete Old Log Files**.
8. In the **Event Properties** fields, select how often you want to delete old log files.
9. Click **OK**, then **Close**.

### 7.5.2 Shutting Down and Restarting Recognition Server

Follow these steps to schedule shutting down Recognition Server using the predefined Shut Down event.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Schedule** from the Server menu.
3. Click **Schedule Event**.
4. In the Event field, choose **Shut Down**.
5. Click **OK**, then **Close**.

As an option, use the Microsoft Task Scheduler to restart Recognition Server. To prevent Recognition Server from displaying a login screen, make sure unattended login settings are selected, as described in "[Setting Up Unattended Login](#)" on page 7-1.

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# Administering Import Server

This section covers the following topics:

- ["Starting, Pausing and Activating the Import Server"](#) on page 8-1
- ["Configuring the Castelle FaxPress Provider"](#) on page 8-1
- ["Configuring Import Server"](#) on page 8-2
- ["Working With Batch Jobs"](#) on page 8-3
- ["Scheduling Processing"](#) on page 8-8
- ["Maintaining Import Server"](#) on page 8-9

For background information about Import Server, see ["About Import Server"](#) on page 1-20.

## 8.1 Starting, Pausing and Activating the Import Server

1. Start the Import Server from the list of programs on the Start menu.

Import Server starts in an active state if there are scheduled jobs. However, Import Server does not begin processing jobs for 30 seconds, allowing you to pause the server if you do not want it to process any scheduled jobs.

2. Activate or pause the server as needed.

Choose **Pause** on the Server menu to make changes to settings or batch jobs.

Choose **Activate** on the Server menu to enable scheduled batch jobs to process.

## 8.2 Configuring the Castelle FaxPress Provider

If importing faxes from a Castelle FaxPress appliance, follow these steps to configure the Castelle FaxPress Provider to work with Import Server. For more information about the Castelle FaxPress product, see [www.castelle.com](http://www.castelle.com).

1. Set up the FaxPress hardware.
2. Install and configure the server software for the appliance.
3. Install the FaxPress client software on the machine that will be running Import Server.
4. Run the client software, log in as the administrator, and verify that you can view the installed server.

See the documentation provided with your FaxPress hardware for more information.

5. Using the client software, configure the incoming fax line you want the Import Server FaxPress provider to work with.
  - a. Using the FaxPress client software, you can configure a fax line on the server so that incoming faxes are automatically routed to the Inbox of a specific user.
  - b. Configure one of the lines so that it will route faxes to the same user ID that an Import Server FaxPress job will login as. (See ["Importing Faxes From a Castelle FaxPress Network Appliance"](#) on page 8-5.)
  - c. Make sure that the user ID is used exclusively by the Import Server FaxPress Provider. That way, incoming faxes meant to be imported into Capture will not be accessed by other users.

## 8.3 Configuring Import Server

This section covers the following topics:

- ["Setting Up Unattended Login"](#) on page 8-2
- ["Setting Up Email Notification For Processing Errors"](#) on page 8-2
- ["Setting Up File Associations"](#) on page 8-3
- ["Setting Up Activity Logging"](#) on page 8-3
- ["Running Import Server as a Service"](#) on page 8-3

### 8.3.1 Setting Up Unattended Login

Follow these steps to specify a login user name and password so Import Server will start up without requiring login information.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the **Login** tab, select the Unattended Login field.
4. Enter a username and password for login.

If you selected Windows domain security as your security model, use the format `\\domain\userID` in the User ID field (for example, `\\domain2\jdoe`) to specify the domain along with the user name. For unattended login, the user must be added as an individual Capture user. See ["Add User or Group Screen \(Windows Domain Security\)"](#) on page 13-57.

5. Activate the server by choosing **Activate** from the Server menu.

### 8.3.2 Setting Up Email Notification For Processing Errors

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the **Email** tab, select the **Send On Error** field.
4. Specify email server and authorization settings.
5. Identify email recipients, separating multiple email addresses with a semicolon (;).
6. Click the **Test Email** button to send an email message that tests the settings.
7. Activate the server by choosing **Activate** from the Server menu.

### 8.3.3 Setting Up File Associations

Follow these steps to automatically change non-image files' extensions before they are printed by the Import Server and converted to images. For more information, see ["How Import Server Converts Non-Images to Images"](#) on page 1-21.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the **File Associations** tab, click **Add**.
4. In the Map File Extension dialog box, enter new and old extensions (for example, .htm to .doc). Click **OK**.
5. Activate the server by choosing **Activate** from the Server menu.

### 8.3.4 Setting Up Activity Logging

Follow these steps to specify how Import Server activity is logged and the number of days log files are retained. You specify the log file path in the batch jobs options, as described in ["Working With Batch Jobs"](#) on page 8-3.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the **Log File** tab, complete log file settings.
4. Activate the server by choosing **Activate** from the Server menu.

### 8.3.5 Running Import Server as a Service

Also see ["Guidelines For Running Servers as Services"](#) on page 12-56.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu.
3. On the **Login** tab, specify unattended login options.  
See ["Setting Up Unattended Login"](#) on page 8-2.
4. On the **Services** tab, specify the number of seconds (30-900) to wait for the service to shut down normally. Click **OK**.
5. Open the Services applet from **Administrative Tools** in the Control Panel.
6. Select the **Oracle Document Capture Import Service**, right-click and choose **Properties**.
7. On the **General** tab, change the Startup Type to **Automatic**.
8. On the **Properties Log On** tab, configure a logon account for a user with rights to access network resources.

This is needed only if the service will access network resources, such as sending emails on error conditions or committing to a network location.

## 8.4 Working With Batch Jobs

This section covers the following topics:

- ["Adding Batch Jobs"](#) on page 8-4
- ["Deleting Batch Jobs"](#) on page 8-4

- ["Importing Faxes From a Castelle FaxPress Network Appliance"](#) on page 8-5
- ["Importing Using a Custom Provider"](#) on page 8-5
- ["Importing Email Messages and Attachments"](#) on page 8-5
- ["Importing Files From an FTP Server"](#) on page 8-6
- ["Importing Files From a Folder"](#) on page 8-6
- ["Importing Files From a Folder and Values From a List File"](#) on page 8-7
- ["Assigning Index Values From a Database During Import"](#) on page 8-8

### 8.4.1 Adding Batch Jobs

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Batch Jobs** from the Setup menu.  
The Batch Settings screen is displayed.
3. From the list of installed import providers in the left pane, select the folder for the job type you want to add. Click **Add Job**.  
A default batch job name of <JOB 1> displays within the provider folder. A red slash mark across the job's icon indicates that it is not scheduled yet.
4. Rename the batch job by right-clicking it, choosing **Rename** and entering a new name.
5. Select settings on the **General** tab.
6. Select settings on the **Processing** tab.
7. On the **Image Output** tab, specify an output format for image and non-image files.
8. Select settings on the provider-specific tab.
  - FaxPress Provider job: See ["Importing Faxes From a Castelle FaxPress Network Appliance"](#) on page 8-5
  - Custom Provider job: See ["Importing Using a Custom Provider"](#) on page 8-5
  - Email Provider job: See ["Importing Email Messages and Attachments"](#) on page 8-5
  - FTP Provider job: See ["Importing Files From an FTP Server"](#) on page 8-6
  - Folder Provider job: See ["Importing Files From a Folder"](#) on page 8-6
  - Folder/List File Provider job: See ["Importing Files From a Folder and Values From a List File"](#) on page 8-7
9. Click **Save**, then **Close**.

### 8.4.2 Deleting Batch Jobs

Follow these steps to delete batch jobs that are no longer used.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Batch Jobs** from the Setup menu.
3. In the left pane of the Batch Job Settings dialog box, open the provider folder and select the batch job you want to delete.
4. Click **Remove Job**, then confirm the deletion.

### 8.4.3 Importing Faxes From a Castelle FaxPress Network Appliance

Follow these steps to automatically import faxes into Capture from a Castelle FaxPress network appliance.

1. Configure the Castelle FaxPress Provider to work with Import Server.  
See "[Configuring the Castelle FaxPress Provider](#)" on page 8-1.
2. In the Batch Job Settings screen, add a FaxPress batch job, and select settings on the **General**, **Processing** and **Image Output** tabs.  
See "[Adding Batch Jobs](#)" on page 8-4.
3. Specify settings on the **FaxPress Provider Settings** tab.  
See "[Batch Job Settings, FaxPress Provider Settings Tab](#)" on page 12-54.
4. Schedule the job and activate Import Server.
  - When the job is activated, the FaxPress Provider logs into the specified server.
  - It checks the user's Inbox for faxes. If a fax is found, it imports the fax starting with the first page of the fax, unless directed to discard the first page when configured.
  - After import, the fax is deleted from the user's Inbox.
  - A batch note is generated for the new batch in Capture that contains the date on which the fax was received and the Remote Terminal ID of the machine that sent the fax.

### 8.4.4 Importing Using a Custom Provider

Follow these steps to create a custom provider macro and select it for use in importing files into Capture.

1. Choose **Macro Manager** from the Setup menu.
2. In the **Category** field of the Macro Manager, select **Custom Provider**.
3. Click **New** and create a new macro.  
See the *Developer's Guide for Oracle Document Capture* for information about Custom Provider events for Import Server macros.
4. In the Batch Job Settings screen, add a Custom Provider batch job, and select settings on the **General**, **Processing** and **Image Output** tabs.  
See "[Adding Batch Jobs](#)" on page 8-4.
5. In the **Provider Macro** field on the General tab, select the custom macro you created.
6. Schedule the job and activate Import Server.

### 8.4.5 Importing Email Messages and Attachments

Follow these steps to set up an email batch job. Import Server imports files attached to incoming email messages into Capture. In addition, it can convert each email message to an image.

1. In the Batch Job Settings screen, add an Email Provider batch job, and select settings on the **General**, **Processing** and **Image Output** tabs.  
See "[Adding Batch Jobs](#)" on page 8-4.

2. Choose the **Email Provider Settings** tab.
3. On the **Email Accounts** subtab, configure the email accounts that Import Server will check for messages when the batch job is run.
4. On the **Email Filters** subtab, set up filters that identify the emails and attachments you want Import Server to search for and import.
5. On the **Processing** subtab, specify the email contents you want to include in a batch note, the priority to assign, and whether to convert the email body to an image.
6. On the **Field Mappings** subtab, map key email values to be assigned to Capture index fields.
7. On the **Post-Processing** subtab, specify what happens to email messages after importing, such as deleting them but forwarding those that failed import.
8. Schedule the job and activate Import Server.

When the job is activated, the provider checks the specified email accounts for messages, looks for emails and attachments containing specified text or particular file extensions, processes the attachments, populates index fields with email data and deletes (and optionally forwards) the messages.

### 8.4.6 Importing Files From an FTP Server

Follow these steps to set up an FTP batch job. Import Server connects to an FTP Server and imports images or other documents (such as Microsoft Word and PDF) into Capture from a specified folder.

1. In the Batch Job Settings screen, add an FTP Provider job, and select settings on the **General, Processing and Image Output** tabs.  
See "[Adding Batch Jobs](#)" on page 8-4.
2. In the Connection Settings fields on the FTP Provider Settings tab, specify the FTP server's host name, and a user ID and password with which to connect to the server.
3. In the **Import Folder** field, specify the folder on the FTP server from which to download and import documents.
4. In the **File Mask** field, specify the type of files to import by entering an extension (\*.TIF, for example). Enter \*.\* to import all files.
5. Select additional FTP settings on the **FTP Provider Settings** tab.
6. Schedule the job and activate Import Server.

When the job is activated, the provider connects to the specified FTP Server, looks for images and documents and processes them, importing each page as an image.

### 8.4.7 Importing Files From a Folder

Follow these steps to set up a folder batch job. Import Server monitors an import folder, and imports all files it finds with a specified file mask.

1. In the Batch Job Settings screen, add a Folder/List File batch job, and select settings on the **General, Processing and Image Output** tabs.

See "[Adding Batch Jobs](#)" on page 8-4.

2. On the Folder/List File Provider Settings tab, select the **Import from folder** radio button.
3. In the **Import Folder** field, specify the folder you want Import Server to monitor. You can use folders that are representative of mapped drive letters or UNC (Universal Naming Convention) paths.  
If you want Import Server to monitor and import files subfolders within this folder, select the Include subfolders field. Import Server creates a new batch for each subfolder processed.
4. In the **File Mask** field, specify the type of files to import by entering an extension (\*.TIF, for example). Specify \*.\* to import all files.
5. Select additional folder settings on the **Folder/List File Provider Settings** tab.
6. Schedule the job and activate Import Server.

### 8.4.8 Importing Files From a Folder and Values From a List File

Follow these steps to set up a list file batch job. Like a folder job, a list file job monitors an import folder, importing files it finds. In addition, it reads a list (text) file containing records that identify each image to import.

A list file job can also search a database for matching list file values in order to populate index fields. See ["Assigning Index Values From a Database During Import"](#) on page 8-8

1. Generate a list file.  
A list file contains records of delimited data, including the names of files to be imported. A list file may also include index values to pass into a Capture batch or values to be matched against a database file.
2. In the Batch Job Settings screen, add a Folder/List File batch job, and select settings on the **General**, **Processing** and **Image Output** tabs.  
See ["Adding Batch Jobs"](#) on page 8-4.
3. On the Folder/List File Provider Settings tab, select the **Import from list** file radio button.
4. In the **Import Folder** field, specify the folder you want Import Server to monitor. You can use folders that are representative of mapped drive letters or UNC (Universal Naming Convention) paths.
5. In the **File Mask** field, specify the type of files to import by entering an extension (\*.TIF, for example). Specify \*.\* to import all files.
6. In the **Field Delimiter** field, specify how fields are delimited in the list file.  
For example, use | (pipe), , (comma) or ~ (tilde).
7. In the **List** file format area, identify how fields are formatted in the list file, by moving available fields to the Selected Fields field and placing them in the same order as they reside in the list file.

Use the left and right arrows to move fields to the Selected Fields field. Use the up and down arrows to change their order in the Selected Fields field.

You can include system-defined fields (enclosed in brackets) and index fields from the selected Capture file cabinet. You must include the [Image Filename] field,

which identifies the name and path of files to be imported. Include the [Skip] field to skip reading a field in the list file.

8. Select additional list file settings on the **Folder/List File Provider Settings** tab.
9. Schedule the job and activate Import Server.

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**Note:** If the list file contains a single line and no image, Import Server processes the batch, but does not create an ERR file for the list file.

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### 8.4.9 Assigning Index Values From a Database During Import

Follow these steps to use a database lookup profile in an Import Server list file batch job. Using a database lookup allows Import Server to not only import images from a folder and read identifying values in the list file, but also to search the database for a record that matches the list file value, and if found, populate other index fields from the database.

1. Create the database lookup profile in Capture Administration.  
See ["Adding a Database Lookup"](#) on page 9-11.
2. In the Import Server's Batch Job Settings screen, add a list file provider batch job.  
See ["Adding Batch Jobs"](#) on page 8-4.
3. On the batch job's **Processing** tab, select the database lookup profile you created in step 1 in the Profile Name field.
4. From the **Search Field** option, choose the database field you want to search.
5. In the **Document Type** options, specify if the batch job will import multiple or single page documents.
6. On the Folder/List File Provider Settings tab, configure the list file settings.  
Be sure to include the Capture field to be matched with the database search field you selected in step 4.
7. Schedule the job, activate Import Server and test the database lookup.

When the job is activated, the provider imports the image whose path is specified in the list file. It then reads a specified value in the list file, searches the database field for a matching value and if found, populates other index fields from the database table.

## 8.5 Scheduling Processing

This section covers the following topics:

- ["Adding an Event"](#) on page 8-8
- ["Deleting Events"](#) on page 8-9

### 8.5.1 Adding an Event

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Schedule** from the Server menu.
3. Click **Schedule Event**.

4. In the **Event** field, select the batch job or file cabinet you want the event to process. You can choose a previously added batch job, a file cabinet, or all file cabinets.
5. In the **Frequency** field, select how often you want the job processed.
6. If you selected a frequency of Once, Every Day, or Every Week, specify frequency details.
7. Click **OK**, then **Close**.
8. Activate the Import Server by choosing **Activate** from the Server menu.
9. Once processing begins, view statistics and error log messages in the Import Server main screen.

## 8.5.2 Deleting Events

Follow these steps to stop an event from processing.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Schedule** from the Server menu.
3. Select the event you want to delete, click **Remove Event**, and confirm the deletion.

## 8.6 Maintaining Import Server

This section covers these topics:

- ["Deleting Old Log Files"](#) on page 8-9
- ["Shutting Down and Restarting Import Server"](#) on page 8-10

Import Server audits certain activities and saves the information in the ecAudit table of the Capture batch database. For more information about audit activities and tables, see ["Auditing in Oracle Document Capture"](#) on page 14-1.

### 8.6.1 Deleting Old Log Files

By default, Import Server creates log files daily that track its activities. Follow these steps to schedule clearing out old log files using the predefined Delete Old Log Files event.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **General Settings** from the Setup menu and click the Error Log tab.
3. Select the **Delete Old Log Files** field.
4. In the **Days to Retain Log Files** field, enter the number of days you want to keep log files. Click **OK**.
5. Choose **Schedule** from the Server menu.
6. Click **Schedule Event**.
7. In the **Event** field, choose **Delete Old Log Files**.
8. In the **Event Properties** fields, select how often you want to delete old log files.
9. Click **OK**, then **Close**.

## 8.6.2 Shutting Down and Restarting Import Server

Follow these steps to schedule shutting down Import Server using the predefined Shut Down event.

1. If needed, pause the server by choosing **Pause** from the Server menu.
2. Choose **Schedule** from the Server menu.
3. Click **Schedule Event**.
4. In the **Event** field, choose **Shut Down**.
5. Click **OK**, then **Close**.

As an option, use the Microsoft Task Scheduler to restart Import Server. To prevent Import Server from displaying a login screen, make sure unattended login settings are selected, as described in "[Setting Up Unattended Login](#)" on page 8-2.

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## Using Capture Administration

This section covers the following topics:

- ["Managing File Cabinets and Index Fields"](#) on page 9-1
- ["Managing Users"](#) on page 9-2
- ["Working With Batches"](#) on page 9-4
- ["Working With Pick-lists"](#) on page 9-6
- ["Working With Database Lookups"](#) on page 9-11
- ["Importing and Exporting Capture Elements"](#) on page 9-12

### 9.1 Managing File Cabinets and Index Fields

This section covers the following topics:

- ["Adding a File Cabinet"](#) on page 9-1
- ["Deleting a File Cabinet"](#) on page 9-1
- ["Adding Index Fields"](#) on page 9-2
- ["Deleting Index Fields"](#) on page 9-2

#### 9.1.1 Adding a File Cabinet

Follow these steps to add a file cabinet in Capture Administration.

1. In the Capture screen, choose **File Cabinets** from the Admin menu.

The Administration screen is displayed, with File Cabinets selected in the left pane's tree structure.

2. Click the **New** (sun) button.
3. Enter a name and click **OK**.

Typically, this is the same name as is used for the file cabinet equivalent to which documents will be filed in your content management system.

The file cabinet is added to the tree.

#### 9.1.2 Deleting a File Cabinet

Deleting a file cabinet deactivates any profiles and server batch jobs associated with it. It also removes all index fields, batch statuses, commit profiles and database lookup profiles associated with it.

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**Caution:** If batches exist within a file cabinet at the time you delete it, the batches and associated images are deleted.

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1. In the Capture screen, choose **File Cabinets** from the Admin menu.  
The Administration screen is displayed, with **File Cabinets** selected in the left pane's tree structure.
2. Select the file cabinet you want to delete.
3. Click the **Delete** button, and confirm the deletion.

### 9.1.3 Adding Index Fields

Follow these steps to add index fields to a file cabinet in Capture Administration.

1. In the left pane of the Administration screen, select the file cabinet to which you want to add index fields.  
The file cabinet's index fields are displayed in the right pane.
2. Click the **Add** button in the right pane.  
The Add New Index Field dialog box is displayed.
3. Select a data type for the index field.
4. Complete other fields as needed.
5. Press **Enter**.  
The dialog box remains, allowing you to quickly create additional index fields.
6. When done, click **Close**.

### 9.1.4 Deleting Index Fields

Follow these steps to delete index fields from a file cabinet. Deleting an index field makes it unavailable for users to assign index values to.

1. In the left pane of the Capture Administration screen, select the file cabinet containing index fields you want to delete.  
The file cabinet's index fields are listed in the right pane.
2. In the right pane, select the index field you want to delete, and click the **Delete** button at the bottom of the screen.
3. Click **Yes** to confirm the deletion.  
The index field is removed from the selected file cabinet.

## 9.2 Managing Users

This section covers the following topics:

- ["Adding Users \(Capture Security\)"](#) on page 9-3
- ["Changing Passwords \(Capture Security\)"](#) on page 9-3
- ["Adding Users and Groups \(Windows Domain Security\)"](#) on page 9-3
- ["Deleting Users and Groups"](#) on page 9-4

## 9.2.1 Adding Users (Capture Security)

If using Capture security, follow these steps to add users, assign them file cabinets and optionally, assign them administration rights. For more information about security models, see "[About Users in Capture](#)" on page 2-2.

1. In the Capture screen, select **Users** from the Admin menu.

The Capture Administration screen is displayed. Current users are listed under the Users heading in the tree structure in the left pane.

2. Click the **New** (sun) button.
3. In the Add User dialog box, enter the user name and password the user will enter to log in to Capture and its components. Click **OK**.

Capture login user names and passwords are not case sensitive.

4. To make the user a Capture administrator, select the **Administration Rights** field.
5. Assign file cabinets to non-administrator users. (Administrators have access to all file cabinets.)

Select a file cabinet in the **Available File Cabinets** field and click the + button to move it to the **Assigned File Cabinets** field.

## 9.2.2 Changing Passwords (Capture Security)

Follow these steps to change a user's password. These steps apply if using Capture security. For information about security models, see "[About Users in Capture](#)" on page 2-2.

1. In the Capture screen, select **Users** from the Admin menu.

The Capture Administration screen is displayed. Current users are listed under the Users heading in the tree structure in the left pane.

2. Select a user.
3. Click **Change Password** and enter a new password.

## 9.2.3 Adding Users and Groups (Windows Domain Security)

Follow these steps to add Capture access for domain users or groups of domain users. After adding users, assign them file cabinets and optionally, administration rights. These steps apply if using Windows Domain security. For information about security models, see "[About Users in Capture](#)" on page 2-2.

1. In the Capture screen, select **Users** from the Admin menu.

The Administration screen is displayed. Current users are listed under the Users heading in the left pane. User names are prefaced with their domain name.

2. Click the **New** (sun) button.

The Add User or Group dialog box is displayed.

3. In the **Domain** field, select a domain to search.

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**Note:** On a very large domain, it may take a while to refresh the user list. You may opt to manually enter names instead of waiting for the list to populate.

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4. To add a user, select **Add a user**. To add a group, select **Add a group**.  
If you add users as a group, they will be assigned the same Capture rights.
5. In the **Name** field, select a user or group. Click **Add**.  
The user or group is displayed in the Selected Users/Groups list.
6. Click **OK**.  
The user or group is listed under the Users heading in the left pane.
7. To make the user or group of users administrators, select the **Administration Rights** field.
8. Assign file cabinets to non-administrator users or groups of users. (Administrators have access to all file cabinets.)  
Select a file cabinet in the **Available File Cabinets** field and click the + (plus) button to move it to the **Assigned File Cabinets** field.

## 9.2.4 Deleting Users and Groups

Follow these steps to remove users or groups of domain users from Capture.

- Deleting Capture users removes their access to Capture and assigned file cabinets.
- Deleting Windows domain users or groups of users removes their access to Capture and assigned file cabinets.

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**Note:** Capture requires at least one user with administration rights.

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1. In Capture Administration, select **Users** from the Admin menu.  
The Capture Administration screen is displayed. Current users and groups are listed under the Users heading in the left pane.
2. Select the user or group you want to delete.
3. Click the **Delete** button, then confirm the deletion.

## 9.3 Working With Batches

This section covers the following topics:

- ["Adding a Batch Status"](#) on page 9-4
- ["Deleting a Batch Status"](#) on page 9-5
- ["Viewing File Cabinets, Batches, and Pages"](#) on page 9-5
- ["Moving Batches Between File Cabinets"](#) on page 9-5
- ["Monitoring User Batch Activity"](#) on page 9-6
- ["Unlocking a Batch"](#) on page 9-6

### 9.3.1 Adding a Batch Status

Adding a status to a file cabinet makes it available to administrators for assigning to batches in profiles and to users for assigning to batches when scanning or indexing.

1. In the Capture screen, select **File Cabinets** from the Admin menu.

The Administration screen is displayed, with all file cabinets listed under the File Cabinets heading in the tree.

2. In the left pane, select the file cabinet to which you want to add a batch status.
3. Click **Batch Statuses**.
4. In the right pane, click the **Add** button.
5. Enter a descriptive status, and press **Enter**.

**Tip:** Press **Enter** again to continue adding batch statuses.

### 9.3.2 Deleting a Batch Status

Deleting a batch status makes it unavailable for administrators to assign in profiles and for users to assign to batches. Previously assigned statuses are retained.

1. In the Capture screen, select **File Cabinets** from the Admin menu.

The Capture Administration screen is displayed, with all file cabinets listed under the File Cabinets heading in the tree structure.

2. In the left pane, select the file cabinet for which you want to delete batch statuses.  
The selected file cabinet's options are listed in the tree.
3. Click **Batch Statuses**.
4. Select the batch status you want to delete, click the **Delete** button in the right pane, then confirm the deletion.

### 9.3.3 Viewing File Cabinets, Batches, and Pages

Follow these steps to view all Capture batches whose file cabinets you are assigned.

1. In the Capture screen, click the **Open Batch Manager** button on the toolbar.

Batch Manager is displayed, listing assigned file cabinets in a tree structure in the left pane.

2. Select a file cabinet and drill down to view its batches and pages.

Click the + (plus) sign that displays when you select a file cabinet or batch to view its contents.

Details about the selected item are displayed in the right pane.

3. If needed, make changes to the batch.
  - Use the toolbar buttons to cut, copy, paste or delete batches. If needed, click the Refresh button to view any new batches added since you opened Batch Manager.
  - With a file cabinet selected in the tree, right-click a batch in the right pane and select commands from the menu to rename, delete, add notes or change status and priority.

### 9.3.4 Moving Batches Between File Cabinets

Follow these steps to cut and paste batches from one file cabinet to another (for example, if batches were scanned using the wrong profile and assigned to another file cabinet).

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**Note:** Index values are not retained when batches are moved to another file cabinet.

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1. In the Capture screen, click the **Open Batch Manager** button on the toolbar.  
Batch Manager is displayed, listing assigned file cabinets in a tree structure in the left pane.
2. Select file cabinets and drill down to view their batches.  
Click the + (plus) sign that displays when you select a file cabinet or batch to view its contents.
3. Move batches between file cabinets by either dragging and dropping or using the **Cut** and **Paste** buttons on the toolbar.
4. If needed, right-click a batch, choose **Rename** and enter a new batch name.

### 9.3.5 Monitoring User Batch Activity

As an administrator, you can monitor user activity at any time, viewing the batches, users and workstations in use.

1. In the Capture screen, select **Locked Batches** from the Admin menu.  
The Capture Administration screen is displayed, with the **Locked Batches** heading selected in the tree structure.  
The right pane lists current Capture users by ID and workstation, along with the file cabinet and batch they are accessing.

### 9.3.6 Unlocking a Batch

As soon as a scanning or indexing user accesses a batch, Capture locks it, preventing other users from accessing it. If the user's session is interrupted, this allows the user can restart and access the batch again.

If needed, follow these steps to unlock a batch and allow another user to access it.

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**Note:** Before unlocking a batch, make certain that the batch is not in use. Unlocking batches that are in use may cause data corruption.

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1. In the Capture screen, select **Locked Batches** from the Admin menu.  
The Capture Administration screen is displayed, with the Locked Batches item selected.
2. Select the batch you want to unlock and click the **Unlock Batch** button from the toolbar.

## 9.4 Working With Pick-lists

This section covers the following topics:

- ["Adding a Capture Native Pick-list"](#) on page 9-7
- ["Adding a Database Pick-list"](#) on page 9-8
- ["Deleting a Database Pick-list"](#) on page 9-10

- ["Adding a Pick-list Relationship"](#) on page 9-10

## 9.4.1 Adding a Capture Native Pick-list

Follow these steps to add a native pick-list for use in Capture. Native pick-lists are stored within the Capture database. For more information, see ["About Pick-lists"](#) on page 2-4.

1. In the Capture screen, choose **Pick-list Sources** from the Admin menu.  
Pick-list sources are listed below the Pick-list Sources heading in the left pane tree structure.
2. Choose **Capture Native Pick-list**.  
Pick-list source settings are displayed in the right pane. Fields that do not apply to Capture native pick-lists are disabled.
3. Click the **Create/Edit** button.  
The Capture Pick-list Management dialog box is displayed. It lists pick-lists on the left and items for the selected pick-list on the right.
4. Click **New** to add a pick-list. Specify a name and data type.

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---

**Note:** To display the pick-list's values in an index field, the pick-list must have the same data type as the index field.

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---

5. Add a pick-list item by entering a value in the **Commit Value** field and clicking **Add**.  
To display one value to users but commit another, enter a different value in the item's Display Value field.  
For information about importing values, see ["Importing Values From a Text File Into a Pick-list"](#) on page 9-7.
6. Using the up and down arrow buttons, order pick-list items as you want them displayed in the pick-list.
7. Click **Close**.  
The new pick-list is displayed in the **Defined Pick-lists** list.
8. Use the pick-list in Capture.

### 9.4.1.1 Importing Values From a Text File Into a Pick-list

Follow these steps to import values from a text file. Capture imports standard ASCII text files delimited with carriage return/line feeds. Each line within the text file is imported as a pick-list item.

1. Display the Capture Pick-list Management screen.  
In the Administration screen, select the **Capture Native Pick-list** source and click **Create/Edit**.
2. In the left table, select the pick-list to which you want to import values.
3. Click the **Import Values** button.  
The Import Pick-list Items from File dialog box is displayed.
4. Select the file to import. Click the **Browse** button, locate the file and click **Open**.

5. Select the **Check for duplicates** field to check for and eliminate duplicate values.

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---

**Note:** Importing large pick-lists takes longer when this option is selected.

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6. Click **Process**.

Capture imports the values and displays items added and errors encountered in the Import Status area.

7. Click **Close**.

#### 9.4.1.2 Exporting Pick-list Values to a Text File

Follow these steps to export values from a Capture pick-list to a text file. Capture writes a selected pick-list's values to a carriage return/line feed delimited text file.

1. Display the Capture Pick-list Management screen.

In the Administration screen, select the Capture Native Pick-list source and click **Create/Edit**.

2. In the left table, select the pick-list whose values you want to export.

3. Click the **Export Values** icon button.

The Specify Export File Name dialog box displays.

4. Enter a name and location for the text file, and click **Save**.

The text file is written to the specified location and filename.

## 9.4.2 Adding a Database Pick-list

Follow these steps to create a pick-list linked to a database for use in Capture. For this type of pick-list, you first create a database connection and then identify how you want the database's values used. For more information, see "[About Pick-lists](#)" on page 2-4.

1. Choose **Pick-list Sources** from the Admin menu.

The Administration screen is displayed.

2. Click the **New** button.

3. Enter a name for the pick-list source and click **OK**.

The new pick-list is listed under the **Pick-list Sources** heading.

4. In the right pane, select **Database Pick-list** in the Pick-list Type field.

5. Click the **Configure** button.

6. In the Pick-list Configuration dialog box, click the **Configure** button.

7. Configure the database connection.

See "[Configuring a Database Connection](#)" on page 9-9.

You return to the Pick-list Configuration dialog box with the database connection configured.

8. Click the **Pick-list Definitions** tab.

9. In the **Pick-list Name** field, enter a name to identify the pick-list.

10. In the **Database Table** field, select the table to which you want to link.
11. In the **Commit Field** field, choose the field whose selected values will be committed with the document.  
  
To display one value to users but commit another, enter a different value in the item's **Display Value** field.
12. In the **Sort Order** field, specify the order in which you want database records displayed in the pick-list to the user.
13. Click **Save**.  
  
The pick-list's name is displayed in the **Defined Pick-lists** list at left.
14. Click **OK** to exit the Pick-list Configuration dialog box.  
  
The pick-list is displayed in the **Defined Pick-lists** list.
15. Use the pick-list in Capture.

### 9.4.2.1 Configuring a Database Connection

Follow these steps to set up a database connection for use in a database pick-list, database lookup or database commit profile.

1. Click the **Configure** button.
2. On the **Provider** tab of the Datalink Properties dialog box, select the OLE DB provider for the type of data you want to access.  
  
If you have a native OLE Database Provider for your database, select that. If not, select the **Microsoft OLE DB Provider for ODBC Drivers**.
3. Complete the fields on the **Connection** tab.

The information on the Connection tab is specific to the OLE Database Provider you chose on the Provider Tab. The configuration can be different for other Database Providers.

- Specify the source of data using either the **Use Data Source Name** or **Use Connection String** option.

The Data Source Name (recommended) is the DSN that you configured using the ODBC Manager in the Windows Control Panel. If you configured an ODBC Source while this dialog box is displayed, click Refresh to load the new ODBC Source into the list.

The Use Connection String option allows you to specify all of the database parameters. If you select this option, it is recommended that you use the Build feature to create the database parameters.

- Enter the User ID and Password to connect to the database.

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**Note:** Some databases, such as Microsoft Access, may not require a user ID and password. If your database does not require them, leave the fields blank.

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Select **Blank Password** only if no password is required for the entered User ID. Selecting **Allow saving of password** saves the password unmasked and unencrypted in the Password field. This allows Capture to automatically connect to the database when you have finished configuring the database connection.

- Select the database as the initial catalog to use.
  - Click **Test Connection** to test the configuration. Your test connection must succeed before the database connection will work in Capture.
4. If needed, complete fields on the **Advanced** and **All** tabs.

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---

**Note:** Click **Test Connection** to test the configuration. Your test connection must succeed before the database connection will work in Capture.

---

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- The **Advanced** tab allows you to fine-tune your ODBC connection parameters. Press F1 to access Microsoft's detailed help for configuring these options. These settings do not need to be configured with most Capture installations.
  - The **All** tab shows you all of the configured ODBC properties. You can modify any property by clicking **Edit Value**. In general, you do not need to use this tab.
5. Click **OK**.

---

---

**Note:** In a multi-user environment, all workstations must have access to the applicable database resources. For example, if you configure a database lookup with an ODBC DSN, the DSN must be available on all Capture workstations using the database lookup.

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### 9.4.3 Deleting a Database Pick-list

Follow these steps to delete a pick-list.

1. In the Capture screen, choose **Pick-list Sources** from the Admin menu.  
Pick-list sources are listed below the **Pick-list Sources** heading in the left pane.
2. Select the database pick-list you want to delete and click the **Delete** button on the toolbar. Confirm the deletion.

### 9.4.4 Adding a Pick-list Relationship

Follow these steps to create a parent/child relationship between pick-lists. For more information, see "[About Pick-list Relationships](#)" on page 2-4.

To create a pick-list relationship, you need two or more pick-lists (Capture Native or database) to link.

1. Choose **Pick-list Relationships** from the Admin menu.  
The Administration dialog box is shown, with the **Pick-list Relationship Profiles** heading selected.
2. Click the **New** (sun) button. Enter a name for the relationship profile.  
Pick-list relationship profile options are displayed on the right.
3. Click **Add** to define the relationship hierarchy.  
The Add/Edit Pick-list Relationships dialog box is displayed.
4. In the Pick-list Source field, select the parent pick-list source (**Capture Native Pick-list** or a specific database pick-list).

5. In the **Pick-list** field, select the parent pick-list from those listed for the selected source.  
The Pick-list Item column is populated with items from the selected parent pick-list.
6. In the **Child Pick-list Source** column, select the child source to display when a user chooses the corresponding parent item from the pick-list. From the available items shown in the **Child Pick-list** column, select the item to display.
7. Click **OK** to close the Add/Edit Pick-list Relationships dialog box.  
The relationship profile is displayed in the **Relationship Hierarchy** list.

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**Note:** If there are more than two levels in the parent/child relationship, the second level displays in bold, indicating a parent/child/grandchild relationship. The child is displayed in bold; double-clicking the child opens the grandchild list.

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8. Use the pick-list relationship profile in a Capture component.

## 9.5 Working With Database Lookups

This section covers the following topics:

- ["Adding a Database Lookup"](#) on page 9-11
- ["Deleting a Database Lookup"](#) on page 9-12

### 9.5.1 Adding a Database Lookup

Follow these steps to add a database lookup profile for use in Capture. For more information, see ["About Database Lookups"](#) on page 2-5.

1. Choose **File Cabinets** from the Admin menu.
2. Select the file cabinet to which you want to add a database lookup.
3. Click the file cabinet's **Database Lookups** heading.
4. Click the **New** (sun) button. Enter a name for the database lookup and click **OK**.
5. In the right pane, click **Configure**. Configure the database connection.  
See ["Configuring a Database Connection"](#) on page 9-9.
6. In the left pane, select the **Search Fields** heading. Identify the database fields to search for values matching those in Capture index fields.

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**Note:** Capture index fields must have the same data type as the database fields whose values will be searched.

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- Click **Add**. The Add/Edit Search Field dialog box is displayed.
- In the **Capture Field** option, select the Capture index field on which to activate the database lookup.
- In the **Database Field** option, select the database field to search.
- Add additional search fields, if needed.

7. In the left pane, select the **Return Fields** heading. Identify the database values to return from the database.  
 Return fields can either populate Capture index fields or display in the hit-list for validation. You must specify return fields for each search field you defined in the previous step.
  - Choose a search field from the **Search Field** option.
  - Click **Add**.
  - In the **Field Type** field, choose the type of field you want to return. A display field displays data only on the hit-list.
  - In the **Capture Field/Display Field** option, select the appropriate field. If you selected *Capture Field* in the **Field Type** field, select the Capture field you want to populate from the list of file cabinet fields. If you selected *Display Field*, enter a field name. For example, you might display a database field called CUS NO as Customer Number to users.
  - In the **Database Field** option, select the field to return from the list of fields in the specified table.
8. Optionally, select the **Options** heading in the left pane and specify how you want Capture to search database fields when a user activates a database lookup.
9. Select the database lookup in a Capture profile.

## 9.5.2 Deleting a Database Lookup

Follow these steps to delete a database lookup profile.

1. Choose **File Cabinets** from the Admin menu and select a file cabinet.
2. Click the file cabinet's **Database Lookups** heading.
3. Select the database lookup you want to delete and click the **Delete** button on the toolbar. Confirm the deletion.

## 9.6 Importing and Exporting Capture Elements

This section describes how to migrate Oracle Document Capture or Oracle Distributed Document Capture elements from one instance to another using the Import/Export utility. For more information, see "[About the Import/Export Utility](#)" on page 2-15. This section covers the following topics:

- "[Using the Import/Export Utility](#)" on page 9-12
- "[Exporting Capture Elements](#)" on page 9-13
- "[Importing Capture Elements](#)" on page 9-13

### 9.6.1 Using the Import/Export Utility

1. From the Start menu, choose **Oracle Document Capture**, then **Import-Export Utility**. (Oracle Document Capture cannot be running when you start the utility.)

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**Note:** If using Microsoft Vista, run the utility with Administrator permissions, in order for Commit Server batch jobs to be imported and exported.

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2. If prompted, log in. You must be authenticated as a Capture administrator to use the utility, either through logging in or domain security authentication.

The utility starts. It contains Export and Import buttons and a Status display area.

## 9.6.2 Exporting Capture Elements

Follow these steps to export selected Capture components or elements.

1. Click the **Export** button (Ctrl+E).

The Specify Export Settings screen is displayed. It displays a tree view of all Capture components and their elements available for export.

2. For each component, select the elements you want to export.

For example, select Index to select all index profiles and macros for export, or click an individual index profile to export.

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**Note:** All file cabinet-related elements are exported and imported together. This means that importing *any* exported file cabinet element (such as a database lookup profile) overwrites the entire file cabinet of the same name. For this reason, it is important to export all file cabinet elements you want the file cabinet to contain at the same time.

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3. Click the **Browse** button and specify a name and location for the export file to be written.

4. Click **Export**.

The export process begins. Details are displayed in the Status field. The zipped file is written to the specified folder.

## 9.6.3 Importing Capture Elements

Follow these steps to import a previously exported zipped file containing Capture elements.

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**Note:** Before importing, the utility verifies that its version is compatible with the installed Oracle Document Capture or Oracle Distributed Document Capture version. If the versions are not compatible, you cannot import.

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1. Click the **Import** button (Ctrl+I). The Select Export File to Import dialog box is displayed.

2. Click **Browse**, locate the zipped file you want to import, and click **OK**.

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**Note:** Importing *any* exported file cabinet element (such as a database lookup profile) overwrites the entire file cabinet of the same name. Before importing, ensure that you are importing all file cabinet elements needed. If not, export again before importing.

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The Elements to Be Imported screen is displayed.

3. Review the elements to be imported and click **Import**. (Click **Cancel** if changes are needed.)

As elements are imported, status information is displayed in the Status field. If a validation error occurs, you are given the option of continuing the import, skipping the profile causing the error, or stopping the import. Once finished, the status *Import completed* is displayed.

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## Working With Commit Profiles

This section covers the following topics:

- ["Adding a Commit Profile"](#) on page 10-1
- ["Deleting Commit Profiles"](#) on page 10-2
- ["Configuring the Language for Full Text OCR Output"](#) on page 10-2
- ["Activating and Ordering Commit Profiles"](#) on page 10-2
- ["Configuring an Oracle UCM 10g Commit Profile"](#) on page 10-3
- ["Configuring an Oracle UCM 11g Commit Profile"](#) on page 10-4
- ["Configuring an Oracle I/PM 10g Commit Profile"](#) on page 10-7
- ["Configuring an Oracle I/PM 11g Commit Profile"](#) on page 10-8
- ["Configuring a Text File Commit Profile"](#) on page 10-10
- ["Configuring an EDP Commit Profile"](#) on page 10-10
- ["Configuring a Database Commit Profile"](#) on page 10-11

### 10.1 Adding a Commit Profile

Follow these steps to add a commit profile for a file cabinet.

1. In the Capture screen, choose **File Cabinets** from the Admin menu. Select the file cabinet to which you want to add a commit profile.
2. From the file cabinet's tree structure, select **Commit Profiles**.
3. Click the **New** (sun) button. Enter a name and click **OK**.
4. In the **Commit Driver** field, specify the method by which this profile will commit documents. Click **Configure** and configure driver settings.

See settings for the selected driver:

- ["Configuring an Oracle UCM 10g Commit Profile"](#) on page 10-3
- ["Configuring an Oracle UCM 11g Commit Profile"](#) on page 10-4
- ["Configuring an Oracle I/PM 10g Commit Profile"](#) on page 10-7
- ["Configuring an Oracle I/PM 11g Commit Profile"](#) on page 10-8
- ["Configuring a Text File Commit Profile"](#) on page 10-10
- ["Configuring an EDP Commit Profile"](#) on page 10-10
- ["Configuring a Database Commit Profile"](#) on page 10-11

5. In the **Document Output Format** field, specify the format in which you want documents committed. Click **Configure** and configure output format settings.
6. In the **If document file already exists** field, specify how the commit profile will handle duplicate documents.
7. In the left pane, click **Commit Profiles** and order and activate profiles.  
See "[Activating and Ordering Commit Profiles](#)" on page 10-2.

## 10.2 Deleting Commit Profiles

Follow these steps to delete a commit profile.

1. In the Capture screen, choose **File Cabinets** from the Admin menu and select a file cabinet.
2. From the file cabinet's tree structure, select **Commit Profiles**.
3. Select the commit profile you want to delete and click the **Delete** button in the toolbar. Confirm the deletion.

## 10.3 Configuring the Language for Full Text OCR Output

This task is required for Full Text OCR output only. Set the language to be used for creating OCR text files during commit, in each commit profile.

1. In Capture Administration, select a commit profile.
2. Click **Configure** next to the **Document Output Format** field.
3. In the Export Settings screen, select the **Perform Full Text OCR** field.
4. In the **OCR Language** field, select the language in which you want the OCR text file created.
5. In the **Code Page** field, select the character set to be used for storing OCR text, if needed.
6. Repeat these steps for each commit profile set for full text OCR output.

## 10.4 Activating and Ordering Commit Profiles

Follow these steps to activate and order commit profile processing.

1. In the Capture screen, choose **File Cabinets** from the Admin menu and select a file cabinet.
2. From the file cabinet's tree structure, select **Commit Profiles**.  
The file cabinet's commit profiles are listed in the right pane. A checkmark is displayed next to active profiles.
3. Use the up and down arrow buttons to order the commit profiles and activate or deactivate them as needed.

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**Note:** Documents in which an error is encountered remain in the batch until the error is resolved and they are committed again. When multiple profiles are used, this means that documents can be committed more than once. It is recommended that you position the commit profile most likely to fail first.

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## 10.5 Configuring an Oracle UCM 10g Commit Profile

Follow these steps to configure a profile for committing documents to Oracle UCM. For more information, see ["About the Oracle UCM 10g Commit Driver"](#) on page 2-9.

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**Note:** You can choose the following output formats when archiving documents to Oracle UCM: TIFF-Multiple Page, PDF-Image Only and PDF-Searchable. (PDF-Searchable is available for Oracle Document Capture only.)

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1. In the Capture Administration screen, create a commit profile.  
See ["Adding a Commit Profile"](#) on page 10-1.
2. Select **Oracle UCM Commit Driver** in the Commit Driver field. Click the adjacent Configure button.  
The Oracle UCM Commit Settings screen is displayed.
3. On the **Login** tab, enter a user name, password, and URL to log in to UCM during commit. Click **Login**. The **Check-In** and **Field Mappings** tabs become available.
4. On the **Check-In** tab, specify where documents will be visible in Oracle UCM, how they will be named and who can view and access them. For information about specifying Type, Security Group, and Account metadata values, see ["Assigning Metadata During an Oracle UCM 10g Commit"](#) on page 10-3.
5. On the **Field Mappings** tab, specify how you want Capture index values written to Content Server fields during commit.

### 10.5.1 Assigning Metadata During an Oracle UCM 10g Commit

You can assign type, security group, and account metadata values to documents in one of these ways:

- ["Using Static Values"](#) on page 10-3
- ["Based on Capture Index Values"](#) on page 10-3
- ["Based on User's Pick-list Selections"](#) on page 10-4

#### 10.5.1.1 Using Static Values

When you assign values in this way, documents committed using the profile are assigned the metadata values selected from those available for the specified Content Server.

1. On the Check-In tab of the Oracle UCM Commit Settings screen, select values in the **Default Type**, **Default Security Group**, and **Default Account** fields.

#### 10.5.1.2 Based on Capture Index Values

When you assign values in this way, documents committed using the profile are assigned metadata values based on Capture field values.

1. On the Check-In tab of the Oracle UCM Commit Settings screen, select the **Assign values dynamically** field, then choose **By Field Mappings**. This adds <Account>, <Content Type>, and <Security Group> metadata mappings to the **Field Mappings** tab.

2. On the **Field Mappings** tab, select a Capture index field for each of the metadata mappings fields.

---

---

**Note:** If you do not map the <Account>, <Content Type>, or <Security Group> fields, the value specified in the corresponding <Default Type>, <Default Security Group>, or <Default Account> field on the Check-In tab is used.

---

---

### 10.5.1.3 Based on User's Pick-list Selections

When you assign values in this way, a combination of metadata values is assigned based on a user's pick-list selection. For example, if a user selects a value of Invoice from a pick-list index field, the document might be assigned a type of ACCTG, a security group of Finance, and no account value (<No Account> selected).

This configuration requires a pick-list. For more information, see ["About Pick-lists"](#) on page 2-4.

1. On the Check-In tab of the Oracle UCM Commit Settings screen, select the **Assign values dynamically** field, then choose **By Index Field**.
2. In the **Index Field** field, select the Capture field whose pick-list value will be used to assign type, security group, and account.
3. In the **Pick-list Source** field, select **Capture Native Pick-list** or a previously created database pick-list.
4. In the **Pick-list** field, select the pick-list from those available for the source you selected.
5. Click **Add**.
6. In the Add Metadata Mappings screen that displays, select one or more field values and select options in the **Type**, **Security Group**, and **Account** fields.

---

---

**Note:** The **Type**, **Security Group**, and **Account** fields each contain a default option (for example, <Default Type>). Select one of these default options to use the value specified in the corresponding default field on the Check-In tab (for example, Default Type field). This can simplify changing the default for many mappings by changing the default value on the Check-In tab.

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---

**Note:** The **Account** field contains a <No Account> option that you can select to skip assigning a value to the Account metadata field. (Type and Security Group are required and cannot be skipped.)

---

---

7. Repeat steps 5 and 6 to continue mapping field values.

## 10.6 Configuring an Oracle UCM 11g Commit Profile

This section covers the following topics:

- ["Configuring an Oracle UCM 11g Commit"](#) on page 10-5
- ["Assigning Metadata During an Oracle UCM 11g Commit"](#) on page 10-5

For more information, see ["About the Oracle UCM 11g Commit Driver"](#) on page 2-10.

## 10.6.1 Configuring an Oracle UCM 11g Commit

Follow these steps to configure a profile for committing documents from Capture 10gR3 to Oracle UCM 11g.

1. In Capture Administration, create a commit profile.

See "[Adding a Commit Profile](#)" on page 10-1.

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**Note:** You can choose the following output formats when archiving documents to Oracle UCM: TIFF-Multiple Page, PDF-Image Only, PDF-Searchable, and Native File. Note that PDF (Searchable) is available for Oracle Document Capture only. Native File should be used for custom applications only.

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2. Select **Oracle UCM 11g Commit Driver** in the Commit Driver field.

---



---

**Note:** Be sure that *11g* is displayed in the commit driver name.

---



---

3. Click the adjacent **Configure** button.

The Oracle UCM 11g Commit Settings screen is displayed.

4. On the **Login** tab, enter a user name, password, and URL to log in to Oracle UCM during commit. (The user name and password are case sensitive.) Click **Login**. The remaining tabs become available.
5. On the **Check-In** tab, specify where to make documents visible in Oracle UCM, how to name them and who can view and access them.

For information about specifying Type, Security Group, and Account metadata values, see "[Assigning Metadata During an Oracle UCM 11g Commit](#)" on page 10-5.

6. On the **Field Mappings** tab, specify how to write Capture index values to Content Server fields during commit.
7. On the **Options** tab, specify additional settings.

## 10.6.2 Assigning Metadata During an Oracle UCM 11g Commit

You can assign type, security group, and account metadata values to documents using one of these methods:

- "[Using Static Values](#)" on page 10-5
- "[Based on Capture Index Values](#)" on page 10-6
- "[Based on User's Pick-list Selections](#)" on page 10-6

### 10.6.2.1 Using Static Values

When you assign values using this method, documents committed using the profile are assigned the metadata values selected from those available for the specified Content Server.

1. On the Check-In tab of the Oracle UCM 11g Commit Settings Screen, select values in the **Default Type**, **Default Security Group**, and **Default Account** fields.

### 10.6.2.2 Based on Capture Index Values

When you assign values using this method, documents committed using the profile are assigned metadata values based on Capture field values.

1. On the Check-In tab of the Oracle UCM 11g Commit Settings Screen, select the **Assign values dynamically** field, then choose **By Field Mappings**. This adds <Account>, <Content Type>, and <Security Group> metadata mappings to the Field Mappings tab.
2. On the **Field Mappings** tab of the Oracle UCM 11g Commit Settings Screen, select a Capture index field for each of the metadata mappings fields.

---

---

**Note:** If you do not map the <Account>, <Content Type>, or <Security Group> fields, the value specified in the corresponding <Default Type>, <Default Security Group>, or <Default Account> field on the Check-In tab is used.

---

---

### 10.6.2.3 Based on User's Pick-list Selections

When you assign values using this method, a combination of metadata values is assigned based on a user's pick-list selection. For example, if a user selects a value of Invoice from a pick-list index field, the document might be assigned a type of ACCTG, a security group of Finance, and no account value (<No Account> selected).

This configuration requires a Capture pick-list.

1. On the Check-In tab of the Oracle UCM 11g Commit Settings Screen, select the **Assign values dynamically** field, then choose **By Index Field**.
2. In the **Index Field** field, select the Capture field whose pick-list value will be used to assign type, security group, and account.
3. In the **Pick-list Source** field, select **Capture Native Pick-list** or a previously created database pick-list.
4. In the **Pick-list** field, select the pick-list from those available for the source you selected.
5. Click **Add**.
6. In the Add Metadata Mappings screen that is displayed, select one or more field values and select options in the **Type**, **Security Group**, and **Account** fields.

---

---

**Note:** The **Type**, **Security Group**, and **Account** fields each contain a default option (for example, <Default Type>). Select one of these default options to use the value specified in the corresponding default field on the Check-In tab (for example, Default Type field). This can simplify changing the default for many mappings by changing the default value on the Check-In tab.

---

---

---

---

**Note:** The **Account** field contains a <No Account> option that you can select to skip assigning a value to the Account metadata field. (Type and Security Group are required and cannot be skipped.)

---

---

7. Repeat steps 5 and 6 to continue mapping field values.

## 10.7 Configuring an Oracle I/PM 10g Commit Profile

Follow these steps to configure a commit profile that write documents from Capture to Oracle I/PM 10g. For direct and indirect guidelines, see "[About the Oracle I/PM 10g Commit Driver](#)" on page 2-11.

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**Note:** In order to file documents directly from Capture to Oracle I/PM, the Oracle I/PM client must be installed on all Capture workstations that perform batch commits. If the Commit Server is performing all batch commits, Oracle I/PM must be installed on the Commit Server only.

---

---

1. In the Capture Administration screen, create a commit profile.  
See "[Adding a Commit Profile](#)" on page 10-1.
2. In the **Commit Driver** field, select the **Oracle I/PM Commit Driver**. Click the Configure button.  
The Oracle I/PM Commit Driver Settings dialog box is displayed.
3. On the **General** tab, specify one or both commit methods.  
Choose **Direct Connect** to archive documents directly into Oracle I/PM. Choose **Filer File Commit** to create an Oracle Filer file for each committed batch. Its corresponding tab becomes active.
4. If committing directly into Oracle I/PM, complete settings on the **Direct Commit** tab.  
Click the **Field Mappings** button and map Capture fields to Oracle I/PM fields. Field data types must match to successfully archive documents from Capture directly into Oracle I/PM.
5. Configure Process Integration options (optional).  
See "[Configure Process Integration Options](#)" on page 10-7.
6. If committing documents to Filer files, complete settings on the **Filer Commit** tab.  
The Filer Path can be either a mapped drive letter or a UNC path; however, Oracle I/PM prefers a mapped drive letter. It is recommended that the path be configured the same on all Capture workstations, and the Oracle I/PM Filer program must have access to the path.
7. On the **Logging** tab, enable and configure logging settings.
8. On the **Advanced** tab, specify how multiple documents can be created for one or more batch pages (optional).

### 10.7.1 Configure Process Integration Options

Follow these steps to set up a Process integration.

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---

**Note:** You must have Process administrator rights. The user account is used exclusively by the Process integration as a service account to create and append Process packages.

---

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1. Select the **Enable Process Integration** field on the **Direct Commit** tab in the Oracle I/PM Commit Settings screen.
2. In the **Database** field, specify a Process database.
3. Click the **Setup** button.

The Process Setup dialog box is displayed, listing Process configurations for the Oracle I/PM application selected in the **Application** field.

A check mark indicates that the configuration is enabled. An asterisk identifies the default configuration.

4. Click **New**.
5. Complete the settings on the tabs.
6. Save the configuration.

## 10.8 Configuring an Oracle I/PM 11g Commit Profile

Follow these steps to configure a commit profile that write documents from Capture to Oracle I/PM 11g. You can commit to Oracle I/PM 11g using either of these methods:

- ["Configuring a Direct Commit"](#) on page 10-8
- ["Configuring an Input Agent Commit"](#) on page 10-9

For more information, see ["About the Oracle I/PM 11g Commit Driver"](#) on page 2-12.

### 10.8.1 Configuring a Direct Commit

Follow these steps to configure a commit profile that writes documents from Capture 10gR3 to Oracle I/PM 11g. Also see ["About Direct Committing"](#) on page 2-12.

1. In Capture Administration, create a commit profile.

See ["Adding a Commit Profile"](#) on page 10-1.

---

---

**Note:** To use searching and appending options, the commit profile's document output format must be set to TIFF-Multiple Page.

---

---

2. In the **Commit Driver** field, select the **Oracle I/PM 11g Commit Driver**.

---

---

**Note:** Ensure that *11g* is displayed in the commit driver name.

---

---

3. Click the adjacent **Configure** button.

The Oracle I/PM 11g Commit Driver Settings screen is displayed.

4. On the **General** tab, leave the **Direct Commit** field selected.
5. Log in to the Oracle I/PM instance by completing the **User ID**, **Password**, **Security Policy**, and **Oracle I/PM Web Service URL** fields and clicking **Connect**.

Each time users commit using the profile, Capture uses this login information to connect to Oracle I/PM via the specified web service.

6. Click the **Field Mappings** tab, select the Oracle I/PM Application to commit to, and map Capture fields to Oracle I/PM fields. (The data type of mapped fields must match.)

7. On the **Advanced** tab, specify options for searching, appending, and logging.

---

**Note:** Searching requires a search definition previously created in Oracle I/PM administration that specifies how documents are matched.

---

If you selected the **Search and Append to Matching I/PM Documents** field, select a definition in the **Search Definition** field.

8. On the **Advanced** tab, optionally enable logging. If enabled, specify a location in which to write the files and whether to log all actions or errors only. Click **OK**.
9. Activate and test the commit profile.
  - In Capture Administration, choose **Commit Profiles** in the side pane. Select the **Active** field for the Oracle I/PM 11g commit profile you created so that a check mark is displayed.
  - Commit a document in a Capture component.
  - Search for and view the document in Oracle I/PM.

## 10.8.2 Configuring an Input Agent Commit

Follow these steps to configure a commit profile that writes input files from Capture 10gR3 to Oracle I/PM 11g for processing by an Oracle I/PM input agent. Also see ["About Input Agent Committing"](#) on page 2-13.

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**Note:** An Oracle I/PM input definition is required for configuring an input agent commit. For more information, see the *Oracle Fusion Middleware Administrator's Guide for Oracle Imaging and Process Management*.

---

1. In Capture Administration, create a commit profile.  
See ["Adding a Commit Profile"](#) on page 10-1.
2. In the **Commit Driver** field, select the **Oracle I/PM 11g Commit Driver**.

---

**Note:** Be sure that *11g* is displayed in the commit driver name.

---

3. Click the adjacent **Configure** button.  
The Oracle I/PM Commit Driver Settings screen is displayed.
4. On the **General** tab, select **Input Agent Commit** as the commit method.
5. Log in to the Oracle I/PM instance by completing the **User ID**, **Password**, **Security Policy**, and **I/PM Web Service URL** fields and clicking **Connect**.
6. In the **Capture Output Directory** field, specify the directory in which to write the input files and images.

---

---

**Note:** The Capture Output Directory can be either a mapped drive letter or a UNC path. This path must be accessible on all Capture workstations/servers that perform document committing, and the Oracle I/PM Input Agent service must have access to the directory.

The Capture output directory and the Input Agent input directory refer to the same location in different ways.

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7. In the **Input Agent Input Directory** field, select a directory configured for the selected Oracle I/PM instance.
8. Click the **Field Mappings** tab, select the I/PM Input Definition to commit to, and map Capture fields to Oracle I/PM fields. (The data type of mapped fields must match.)
9. On the **Advanced** tab, optionally enable logging. If enabled, specify a location in which to write the files and whether to log all actions or errors only.
10. Activate and test the commit profile.
  - In Capture Administration, choose **Commit Profiles** in the side pane. Select the **Active** field for the Oracle I/PM 11g commit profile you created.
  - Commit a document in a Capture component.
  - Search for and view the document in Oracle I/PM. (Documents must be processed by the Oracle I/PM input agent before users can view them in Oracle I/PM.)

## 10.9 Configuring a Text File Commit Profile

Follow these steps to change the text file commit driver's default settings. By default, Capture creates a quotation, comma-separated text file that contains the full path to each image file, followed by document index data. For more information, see "[About the Text File Commit Driver](#)" on page 2-14.

1. In the Capture Administration screen, select a Commit Text File profile.

See "[Adding a Commit Profile](#)" on page 10-1.
2. Click the commit driver's **Configure** button.

The Commit Text File Settings dialog box displays.
3. On the **General** tab, specify how commit text files and document files will be written.
4. On the **Formatting** tab, specify the fields and delimiters to include in the commit text file.
5. Optionally, specify how document files will be named on the **Document File Naming** tab.

## 10.10 Configuring an EDP Commit Profile

Follow these steps to create a commit profile that uses an Electronic Document Provider (EDP) macro to commit documents. You might do this if your organization commits batches directly to an electronic content management system other than Oracle UCM or Oracle I/PM. For detailed information about writing macros for use in Capture, see the *Developer's Guide for Oracle Document Capture*.

1. Create an Electronic Document Provider macro.  
Choose **Manage Macros** from the System menu, select **Electronic Document Provider** in the Category field, and click **New**. Import or write a macro using available EDP macro events.
2. In the Capture Administration screen, create a commit profile.  
See "[Adding a Commit Profile](#)" on page 10-1.
3. In the **Commit Driver** field, select **Electronic Document Provider**. Click the commit driver's **Configure** button.
4. In the Macro Selection dialog box, select an EDP macro from the **Available Macros** field and click **OK**.

## 10.11 Configuring a Database Commit Profile

Follow these steps to configure a commit profile that commits document index values to a database and files to either a folder (whose path is stored in the database) or to a database table (within an image/blob field).

1. In the Capture Administration screen, add a commit profile.  
See "[Adding a Commit Profile](#)" on page 10-1.
2. In the **Commit Driver** field, select the **Database Commit Driver**. Click the commit driver's **Configure** button.
3. On the **Database** tab of the Database Commit Settings screen, click the **Configure** button. Configure the database connection.  
See "[Configuring a Database Connection](#)" on page 9-9.
4. In the **Document Table** field, select the database table to which you want to commit documents.
5. In the **Parent Table** field, select a parent table to search and write index values to while committing to the document table (optional).  
See "[Committing to Parent and Document Tables \(optional\)](#)" on page 10-11.
6. On the **Document** subtab, click **Add** and specify Capture index fields whose values you want written to document fields.
7. Select the **Commit** tab and specify where documents will be committed (folder or image/blob field).

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**Note:** To commit documents to an image/blob field, select a field whose data type supports long binary data.

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### 10.11.1 Committing to Parent and Document Tables (optional)

Follow these steps to write Capture values to two tables (a parent and a document table) linked by a key field. This option is typically used to search for one or more higher level values in a parent table (writing a new record if needed and allowed), and then use that information to insert records containing detailed values in the document table.

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**Note:** You can search multiple parent table fields or a single parent key field. For more information, see "[About Committing Index Values to Linked Tables](#)" on page 2-15.

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1. On the **Database** tab of the Database Commit Settings screen, select a table in the **Parent Table** field.
2. Click the **Parent** tab. Select the key field in **Parent Key** and **Document Key** fields. These fields must be of the same data type.

---

---

**Note:** You do not need to designate the key fields as primary keys or define a join relationship between them in the database.

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3. In the table, click **Add** and map Capture fields to fields from the parent table.
4. Apply optional settings if needed.
  - Select the **Search using the parent key field only** option to match records based solely on the parent key field. Otherwise, all mapped fields are used when searching the parent table.
  - The **Include blank fields in search** option controls whether records are matched when Capture searches the parent table and finds null values for mapped fields.
  - Select the **Cancel commit if parent record not found** field to skip document commit if no matching parent record is found.

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## Scan and Index User Interface

This chapter contains information about the user interface for Oracle Document Capture. Screens for the following components are described in this chapter:

- ["Scan For ISIS Screens"](#) on page 11-1
- ["Scan For Adrenaline Screens"](#) on page 11-19
- ["Indexing Screens"](#) on page 11-47

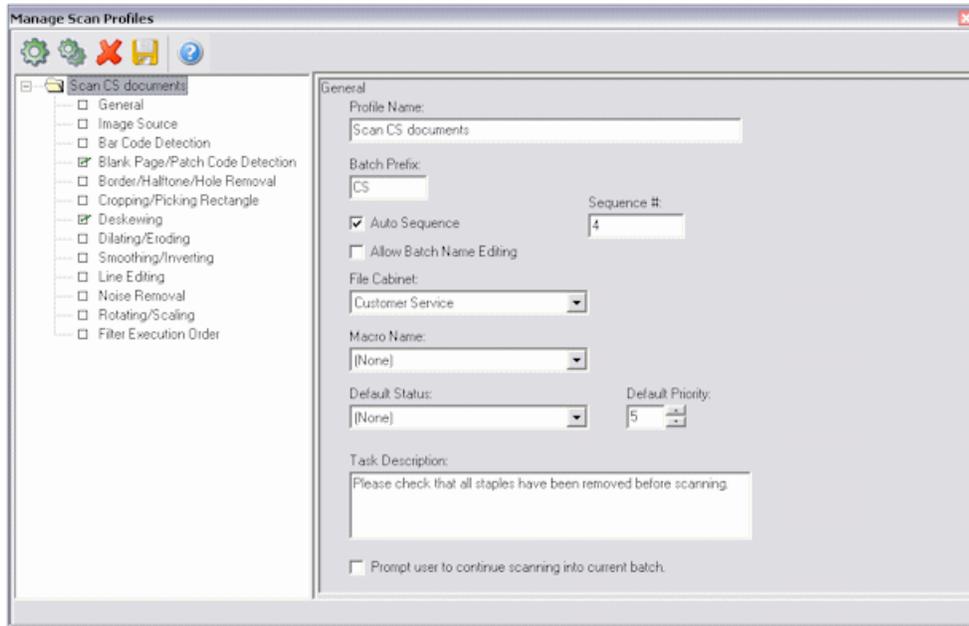
### 11.1 Scan For ISIS Screens

The following screens are used in Scan for ISIS administration.

- ["Manage Scan Profiles, General Options"](#) on page 11-1
- ["Manage Scan Profiles, Image Source Options"](#) on page 11-3
- ["Manage Scan Profiles, Bar Code Detection Options"](#) on page 11-5
- ["Manage Scan Profiles, Blank Page/Patch Code Detection Options"](#) on page 11-7
- ["Manage Scan Profiles, Border/Halftone/Hole Removal Options"](#) on page 11-8
- ["Manage Scan Profiles, Cropping/Picking Rectangle Options"](#) on page 11-9
- ["Manage Scan Profiles, Deskewing Options"](#) on page 11-10
- ["Manage Scan Profiles, Dilating/Eroding Options"](#) on page 11-13
- ["Manage Scan Profiles, Smoothing/Inverting Options"](#) on page 11-14
- ["Manage Scan Profiles, Line Editing Options"](#) on page 11-15
- ["Manage Scan Profiles, Noise Removal Options"](#) on page 11-16
- ["Manage Scan Profiles, Rotating/Scaling Options"](#) on page 11-18
- ["Manage Scan Profiles, Filter Execution Order Options"](#) on page 11-18

#### 11.1.1 Manage Scan Profiles, General Options

Use this screen to select general settings for a scan profile.



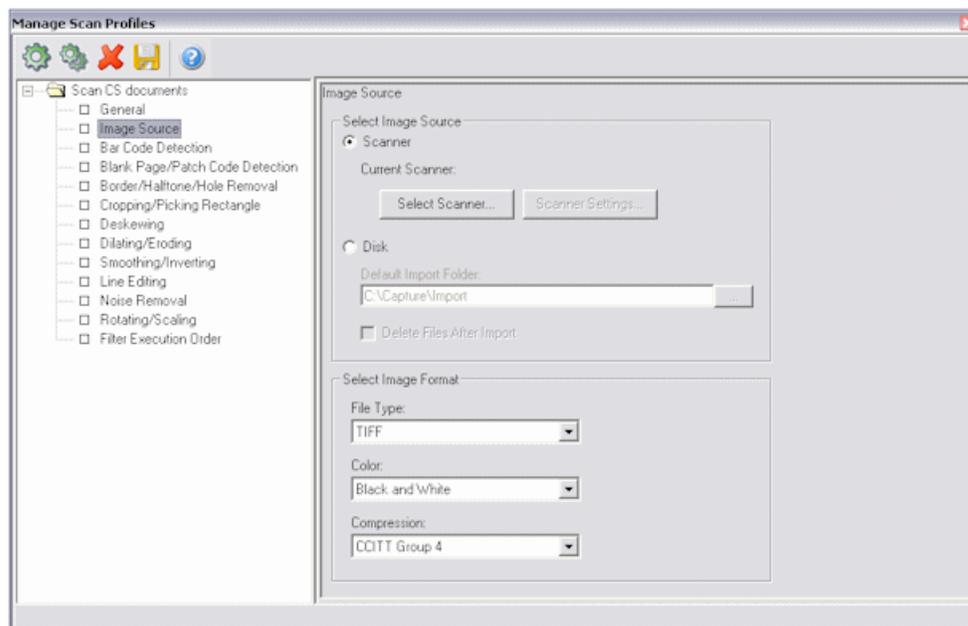
To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **General** in the side pane.

Element	Description
Profile Name	Enter a name for the scan profile that describes the documents to be scanned using it. Users will see this name when selecting a scan profile.
Batch Prefix	Enter a prefix (optional). If you include a prefix, users will see this name in the Batch Scanning screen's <b>Batch Name</b> field after they select the scan profile. You can include up to eight characters.
Auto Sequence/Sequence Number	<p>When Auto Sequence is selected, Scan names batches for users by combining the prefix with an auto sequence number that increments by one with each batch. Enter the number you want used to start naming batches in the <b>Sequence #</b> field. For example, if you enter INV as the batch prefix and 1 in the Sequence # field, the first batch would be named INV0000000000001, the second would be INV0000000000002, and so on. These options are available when a batch prefix is specified.</p> <p>Note: To prevent conflicts between multiple Scan workstations, append a workstation identifier after the batch prefix (for example, CORRA, CORRB, and CORRC).</p>
Allow Batch Name Editing	Select this field to allow users to enter a batch name in the Batch Scanning screen's <b>Batch Name</b> field prior to scanning. This option is available only if the <b>Auto Sequence</b> field is selected. If deselected (the default), users cannot enter batch names. Note that users can rename batches in the Batch Scanning screen after they are scanned, regardless of this setting.
File Cabinet	Select the file cabinet to which you want batches assigned. This field lists all file cabinets available. This is the file cabinet from which the batches will be indexed and then committed into your document management system.

Element	Description
Macro Name	If special scan customization is needed using a macro, select the macro in this field.
Default Status/Default Priority	Specify a status and/or priority to be assigned to batches when they are created.  Users can change the status or priority you select here. You define statuses in Capture Administration.
Task Description	Enter optional instructions for the scanning user.  Users will see this message in the <b>Task Description</b> field after selecting the scan profile in the Batch Scanning screen. (A task description is displayed to users only if you include one in this field.)  For example, you may want to remind users to check that the documents are properly collated and that all staples have been removed before scanning.
Prompt user to continue scanning into current batch	This field determines what happens when the scanner's feeder tray runs out of paper.  If you select this field, users will be given the choice to continue scanning into the current batch when they add more paper to the scanner. If deselected (the default), the batch is completed and the user must click <b>Begin Scanning</b> again to start a new batch.

### 11.1.2 Manage Scan Profiles, Image Source Options

Use this screen to configure a scanner or import source for the profile and to specify how images are stored in Capture.

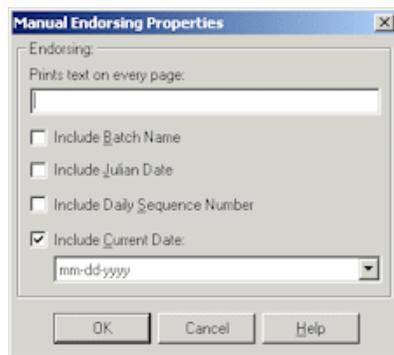


To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Image Source** in the side pane.

Element	Description
Scanner	Select this option to scan images using a selected scanner. Once a scanner is selected, its name is displayed after Current Scanner.
Select Scanner	Choose a scanner from a list of scanners for which you have ISIS drivers installed. You can also add a scanner, specifying its driver location.  Note: For document imaging scanners, most manufacturers provide the ISIS drivers on a CD shipped with the scanner. It is recommended to check the manufacturer's Web site for update drivers. Typically, the ISIS drivers are installed using a separate installation program.
Scanner Settings	Click this button to configure scanner settings. Available settings depend on the selected scanner. See the documentation that came with the scanner for more information.
Disk	Select this option to import images from a specified folder rather than scan them. When users click the Begin Scanning button in the Batch Scanning screen, a standard file dialog box displays, prompting them to select files to import.
Default Import Folder	Enter the path where the images are located. Users can change this location when importing files.
Delete Files After Import	Select this field to delete images from the import folder as they are imported.
File Type	Select the format in which you want images stored. You can choose TIFF (default), JPEG, PCX, or BMP. Because files are larger when stored in PCX and BMP formats, TIFF is recommended for black and white documents and JPEG is recommended for color documents.  <b>Note:</b> This setting affects the format in which images are stored in Capture's batch folder. Using commit profile options, you can output images in a different format when committing them, as described in " <a href="#">Commit Profile Settings Screen</a> " on page 13-9.
Color	Choose the color depth you want used to store images. The color options available depend on your File Type field selection (described above). Black and White images are significantly smaller than grayscale or color images, but typically display less detail.
Compression	Choose a compression method for images. Image compression substantially reduces file size; uncompressed images can exceed 1MB. The compression options available depend on your File Type and Color field selections (described above).  Note: Although listed as an option, Oracle I/PM does not support WANG JPEG compression when specifying a File Type of TIFF. To scan TIFF images with JPEG compression, use Oracle Document Capture Scan for Adrenaline.

### 11.1.2.1 Manual Endorsing Properties

If your scanner has an imprinter/endorser, use this screen to configure automatic imprinting of images as they are scanned.

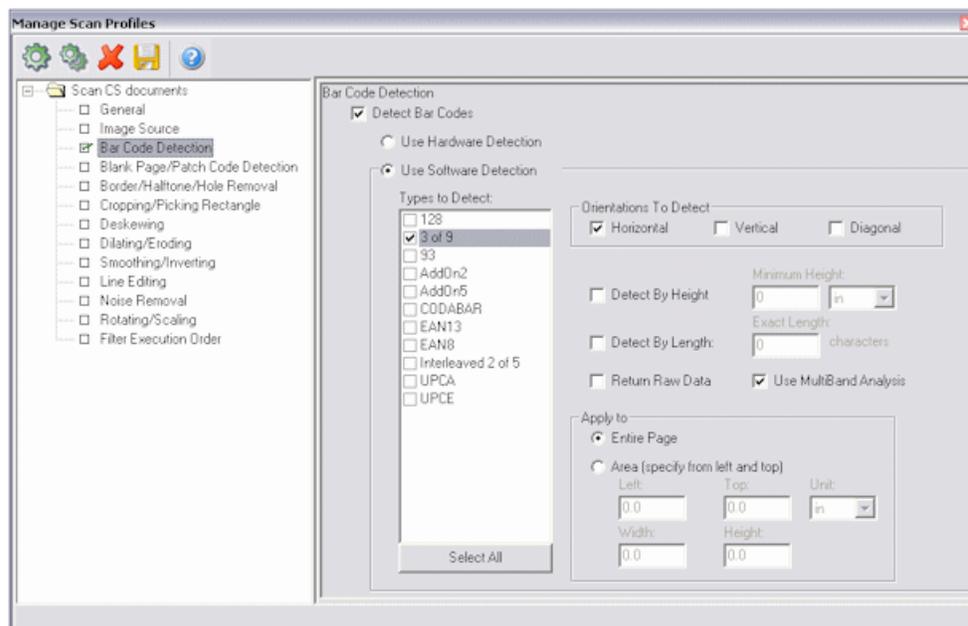


To display this screen, click the **Scanner Settings** button from the Image Source options in the Manage Scan Profiles screen. In the Scanner Settings dialog box, select **Manual**, and click **Configure**.

Element	Description
Prints text on every page	Enter the text you want displayed on each document page.
Include Batch Name	Include the batch's assigned name on each document page.
Include Julian Date	Include the scan date and time, expressed as a Julian date, on each document page.
Include Daily Sequence Number	Include a counter number that increments by one for each batch, restarting each day.
Include Current Date	Include the current date on each document page, displayed using the selected format.

### 11.1.3 Manage Scan Profiles, Bar Code Detection Options

Use this screen to specify whether bar codes are detected during scanning and how they are decoded. The bar code filter can detect a virtually unlimited number of bar codes on a page. For more information, see "[Bar Code Detection](#)" on page 1-4.

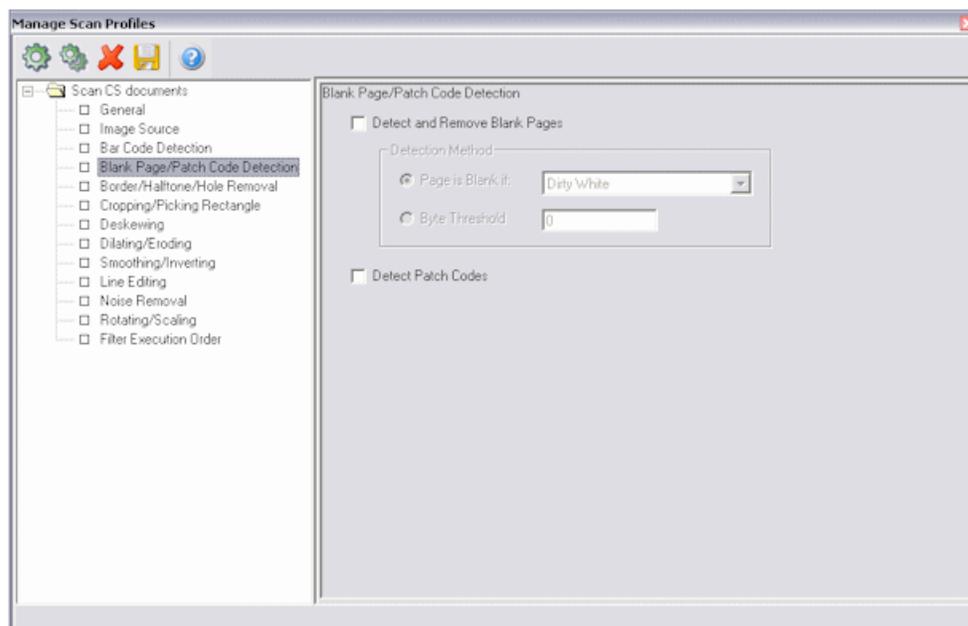


To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Bar Code Detection** in the side pane.

Element	Description
Detect Bar Codes	Select this field if you want bar codes detected.
Use Hardware Detection/Use Software Detection	Some scanners have bar code detection built into them. If this is the case, select <b>Use Hardware Detection</b> . Otherwise, select <b>Use Software Detection</b> to enable Scan to detect them.  (Skip the remaining steps if using hardware detection.)
Types to Detect	Select the types of bar codes you want Scan to detect.  You can select as many types as you want in the Types to Detect field. Click the Select All button to select all bar codes listed. The fewer types you select, the faster images are processed.
Orientations to Detect	Select the orientations of the bar code as seen on the scanned paper.  Selecting all three orientations (Horizontal, Vertical and Diagonal) is recommended, as the scanned image may be skewed.
Detect by Height, Minimum Height	Specify the minimum height for bar codes (if known).  To increase detection speed, reduce the amount of the page that is searched using the Detect by Height and Minimum Height fields. Specify the minimum height in the left field and the unit in the right field (inches, centimeters or pixels).  For example, if you enter 2 in the Minimum Height field, Scan for ISIS searches for bar codes every 2 inches of the page. Bar codes smaller than the specified minimum height may be ignored; for example, a 1 inch bar code might lay in between the 2 inch gap described in the example above.
Detect by Length	Specify the number of characters in the bar codes to detect (if known).  To increase detection speed and accuracy, select the Detect by Length field and enter the exact number of characters that comprise the value of the bar code. Detected bar codes that do not match that length are ignored.
Return Raw Data	Select this field to return any special characters in bar code values.  Bar codes sometimes contain extra characters as part of their symbology. For example, the Code 39 symbology contains an asterisk at the beginning and end of its bar codes. By default, this diagnostic option is deselected.
Use MultiBand Analysis field	Select this field if poor quality images will be scanned using this profile. In general, this setting is recommended to improve recognition of bar codes.  Selecting this field may increase processing time, but is usually not noticeable.
Apply to	Specify the image area on which you want bar codes detected.  Choose <b>Entire Page</b> to examine the whole page or <b>Area</b> to specify a particular area on the image. If you select <b>Area</b> , choose a unit of measurement in the Unit field and specify the area from the left and top in the Left, Top, Width, and Height fields. Specifying the bar code's location on the scanned page will increase performance and reduce processing time.

## 11.1.4 Manage Scan Profiles, Blank Page/Patch Code Detection Options

Use this screen to set Scan to detect patch codes and detect and remove blank pages during scanning. For more information, see "[Blank Page and Patch Code Detection](#)" on page 1-4.



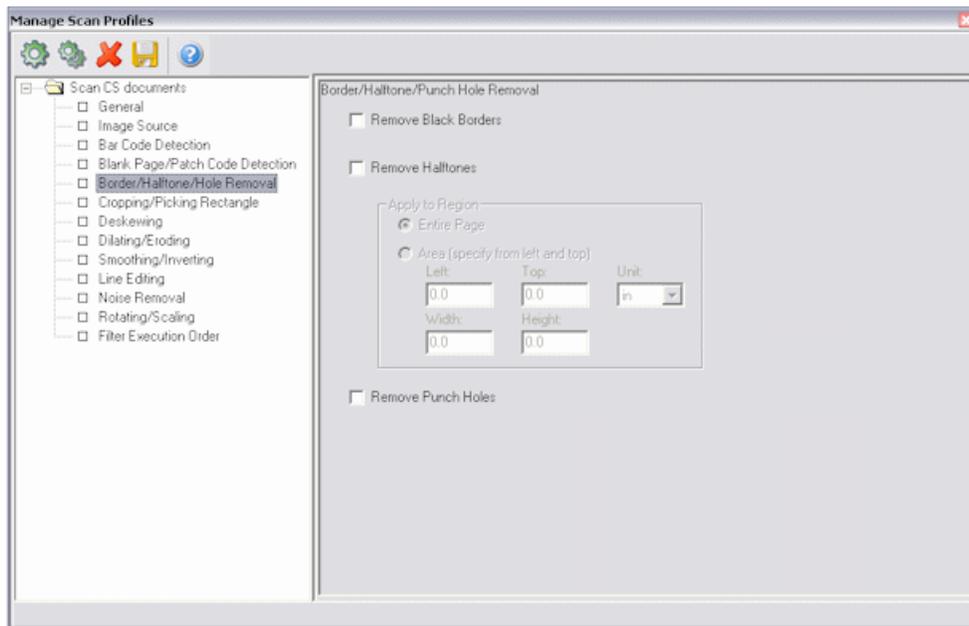
To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Blank Page/Path Code Detection** in the side pane.

Element	Description
Page is Blank If	<p>Select this field to detect and remove blank pages using the blank page method. Specify how much noise is allowed for a page to be considered blank. You can choose:</p> <ul style="list-style-type: none"> <li>▪ <b>Pristine White:</b> Considered a blank page if total black pixels on the page are less than 0.01% of total pixels.</li> <li>▪ <b>Dirty White (default):</b> Considered a blank page if total black pixels on the page are less than 0.5% of total pixels.</li> <li>▪ <b>Very Dirty White:</b> Considered a blank page if total black pixels on the page are less than 1% of total pixels.</li> <li>▪ <b>One Line OK:</b> Considered a blank page if clusters of black pixels (that might be considered text) are found on the page.</li> </ul>
Byte Threshold	<p>Select this field to detect and remove blank pages by byte threshold. Scan for ISIS will delete pages whose file size is less than or equal to the threshold value you specify in this field. For black and white (200 x 200 DPI images), the recommended value is 1500; at this setting, the application can usually differentiate between a blank separator page and a page with a small amount of text. However, you will need to conduct scan testing to determine the value required.</p>

Element	Description
Detect Patch Codes	<p>Select this field to detect patch codes.</p> <p>If you encounter problems detecting patch codes, try improving pages' image quality using the following filters. Be sure to run these filters before the bar code detection filter; for details about filter order, see "<a href="#">Manage Scan Profiles, Filter Execution Order Options</a>" on page 11-18.</p> <ul style="list-style-type: none"> <li>■ Deskew, which straightens skewed images</li> <li>■ Noise removal, which cleans up dirty images</li> <li>■ Line editing, which can repair lines in patch codes</li> <li>■ Smoothing/inverting, which can smooth lines in patch codes</li> </ul>

### 11.1.5 Manage Scan Profiles, Border/Halftone/Hole Removal Options

Use this screen to set Scan to remove black borders, halftones and holes from images during scanning. The filter looks for objects that resemble punch holes around the edges of the image. It does not remove objects that resemble punch holes from other areas of the image. For more information, see "[Border, Halftone, and Hole Removal](#)" on page 1-5.



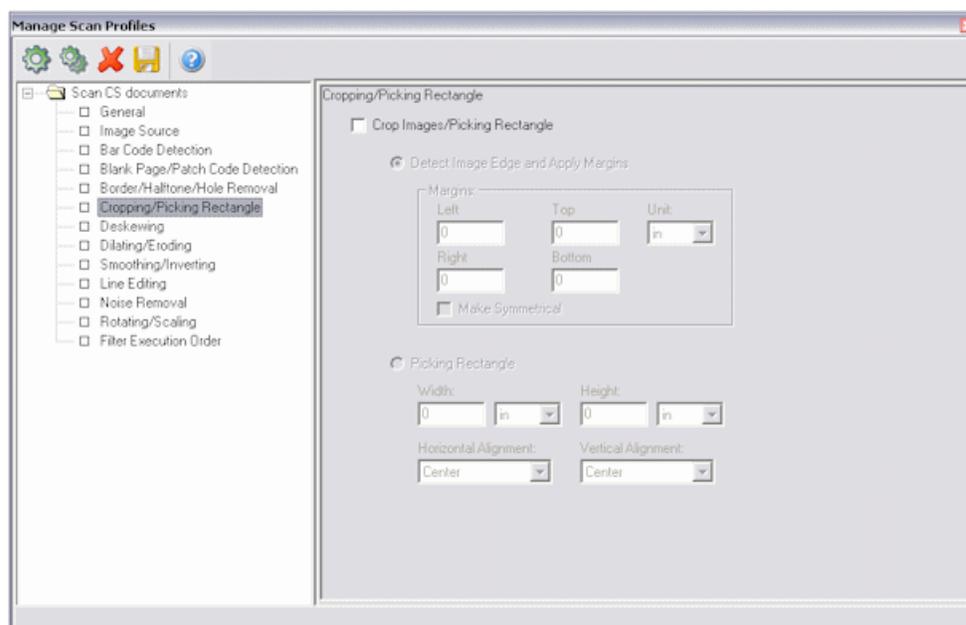
To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Border/Halftone/Hole Removal** in the side pane.

Element	Description
Remove Black Borders	Select this field to remove borders around image edges after scanning. The filter removes borders around image edges by changing them to white.
Remove Halftones	Select this field to remove a background or graphics object from images.

Element	Description
Apply to	Specify the image area from which you want halftones removed.  Choose <b>Entire Page</b> to examine the page or <b>Area</b> to specify a particular area on the image. If you select <b>Area</b> , select a unit of measurement in the Unit field and specify the area from the left and top in the Left, Top, Width and Height fields.
Remove Punch Holes	Select this field to detect and remove punch holes from image edges.

### 11.1.6 Manage Scan Profiles, Cropping/Picking Rectangle Options

Use this screen to set image margins and to add or remove white space around image edges. For more information, see "[Cropping and Picking Rectangles](#)" on page 1-5.



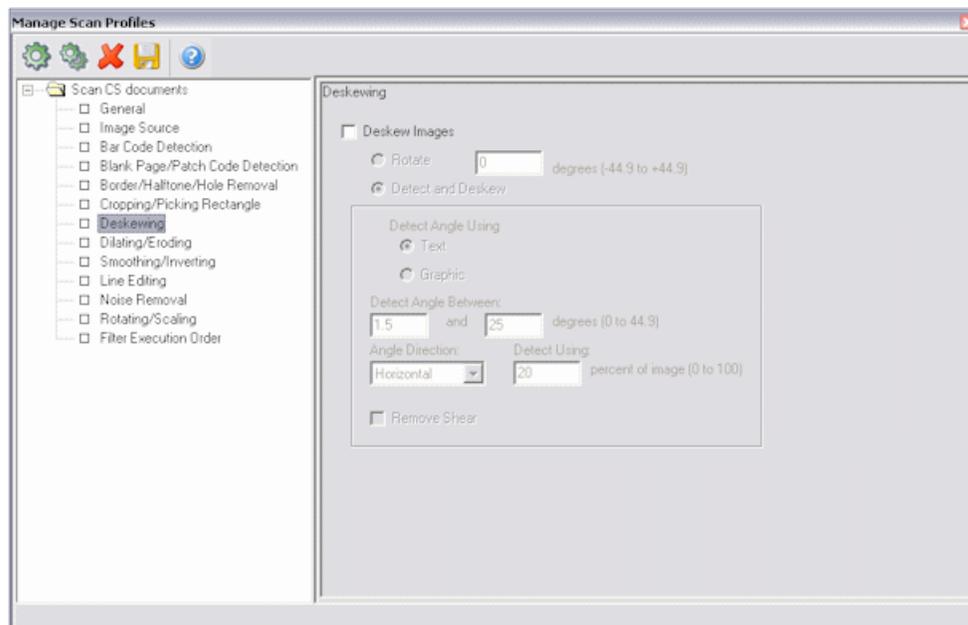
To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Cropping/Picking Rectangle** in the side pane.

Element	Description
Crop Images/Picking Rectangle	Select this field if you want images cropped.

Element	Description
Crop Images	<p>To crop images based on an image edge, select the first crop mode and select settings.</p> <p>Choose <b>Detect Image Edge</b> and <b>Apply Margins</b> if you want Scan to detect the image's edges and apply a specified amount of white space around images.</p> <ul style="list-style-type: none"> <li>■ Set the amount of white space by entering values in the Top, Left, Bottom and Right fields and choosing a unit type (inches, centimeters or pixels) in the Unit field. For example, you might want to crop a text image to the text edges, and then leave one inch of white space around.</li> <li>■ Select the Make Symmetrical field to keep the top/bottom and left/right margins the same. When this field is checked, the Bottom and Right fields become disabled, and the Top field's value is used for both top and bottom margins and the Left field's value is used for both left and right margins.</li> </ul>
Picking Rectangle	<p>Select the radio button to capture only a portion of a scanned image.</p> <ul style="list-style-type: none"> <li>■ Specify a set width and height. (To scale images instead, see "<a href="#">Manage Scan Profiles, Rotating/Scaling Options</a>" on page 11-18.) Specify values in the Width and Height fields and choose a unit type in the Unit field. Only the data captured within these dimensions will be saved in the batch.</li> <li>■ Specify the image area from which to begin the picking rectangle. For example, if you specified Left in the Horizontal Alignment field, Top in the Vertical Alignment field, and 2 inches in the Width and Height fields, Scan for ISIS would capture only the 2 square inches in the upper left of each image scanned into the batch.</li> </ul>

### 11.1.7 Manage Scan Profiles, Deskewing Options

Use this screen to straighten skewed images. You can either rotate images a specified number of degrees or set Scan to detect the skew angle and rotate the image to correct it. For more information, see "[Deskew](#)" on page 1-5.



To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Deskewing** in the side pane.

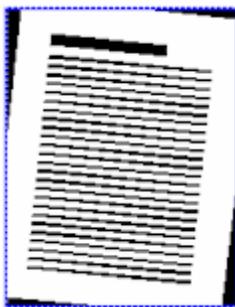
Element	Description
Deskew Images	Select this field to deskew images.
Rotate/Detect and Deskew	Select a deskew mode. <ul style="list-style-type: none"> <li>Choose <b>Rotate</b> to rotate images a specified degree without detecting a skew angle. You can rotate images up to -44.9 and up to 44.9 degrees. In the adjacent field, enter the number of degrees by which you want them rotated. A positive number rotates the image to the left; a negative number rotates it to the right. Proceed to step 8.</li> <li>Choose <b>Detect and Deskew</b> to detect a skew angle and correct it.</li> </ul>
Detect Angle Using	Specify whether you want to use graphics or text to detect the skew angle., choose <b>Text</b> to detect the skew angle using letter-like objects, or <b>Graphics</b> to detect the skew angle using graphics objects, tables and black areas with white text.  Note: If images contain both text and graphics areas, decide which type of object you want used to detect the skew angle. Choose <b>Graphics</b> for images that contain large black areas, and choose <b>Text</b> for images that primarily contain text, with some tables and lines.  Note: To remove shearing effects from images, choose <b>Graphics</b> and select the Remove Shear field.
Detect Angle Between	Specify the minimum and maximum skew angle to detect.  You can specify a range between 0 and 44.9 degrees. Enter the number of degrees in the minimum and maximum fields. An image's skew will be corrected only if it falls in the specified range.

Element	Description
Angle Direction	<p>Specify the direction in which you want the skew angle measured.</p> <p>The angle is measured between the image's edge and the Horizontal or Vertical axis. You can also measure the skew angle in Both directions. Note that the Remove Shear option will be disabled if Both is chosen.</p>
Detect Using	<p>Specify how much of the image you want examined for the skew angle.</p> <p>In the Detect Using field, enter the percentage of the image area you want used to detect the skew angle. You can enter a number between 1 to 100. The default is 20, which specifies that 20% of the image area is used. Note that the larger the percentage you specify, the longer the processing time.</p>
Remove Shear	<p>Select this field to remove shear from images. See "<a href="#">Remove Shear</a>".</p> <ul style="list-style-type: none"> <li>■ When the Remove Shear field is deselected, Scan removes the rotational skew from images. This is needed when the connecting edges of skewed image data maintain a 90 degree angle, and Scan can correct the skew by rotating them.</li> <li>■ When the Remove Shear field is selected, Scan removes the shearing skew. This is needed when the connecting edges of skewed image data do not maintain a 90 degree angle.</li> </ul> <p><b>Note:</b> The Angle Direction field must be set to Vertical or Horizontal for the Remove Shear option to work. The Remove Shear setting is disabled if the direction is set to Both.</p>

### 11.1.7.1 Remove Shear

- When the Remove Shear field is deselected, Scan removes the rotational skew from images. This is needed when the connecting edges of skewed image data maintain a 90 degree angle, and Scan can correct the skew by simply rotating them.

**Figure 11-1** *Image with rotational skew, no shearing skew*



- When the Remove Shear field is selected, Scan removes the shearing skew. This is needed when the connecting edges of skewed image data do NOT maintain a 90 degree angle.

**Figure 11-2** Image with shearing skew, no rotational skew

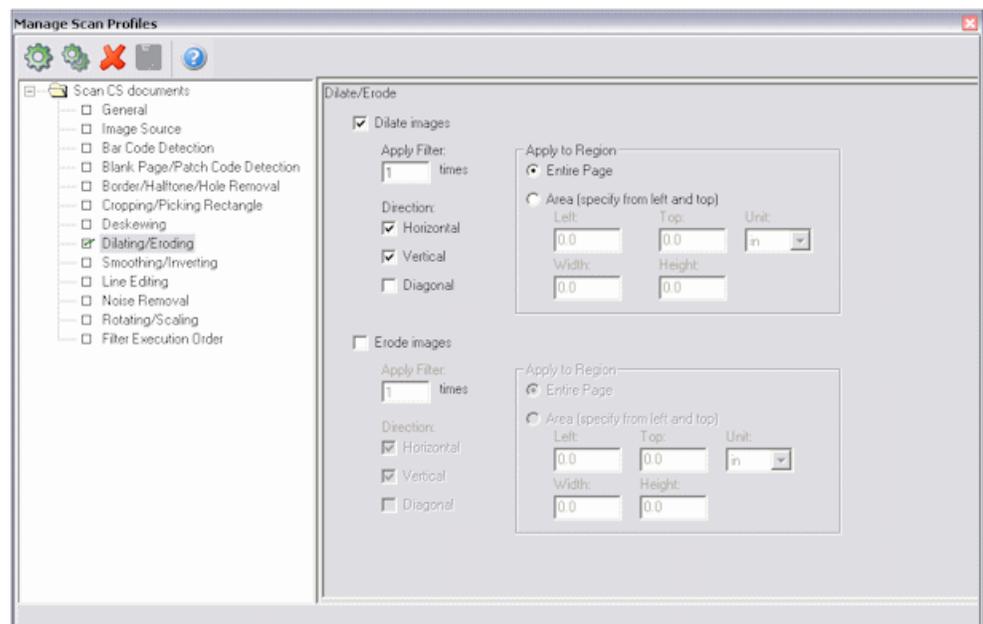

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**Note:** The Direction field must be set to Vertical or Horizontal for the Remove Shear option to work. The Remove Shear setting is disabled if the direction is set to Both.

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### 11.1.8 Manage Scan Profiles, Dilating/Eroding Options

Use this screen to either expand the area of black objects on images (Dilate filter) or trim the area of black objects (Erode filter). For more information, see ["Dilating and Eroding"](#) on page 1-6.



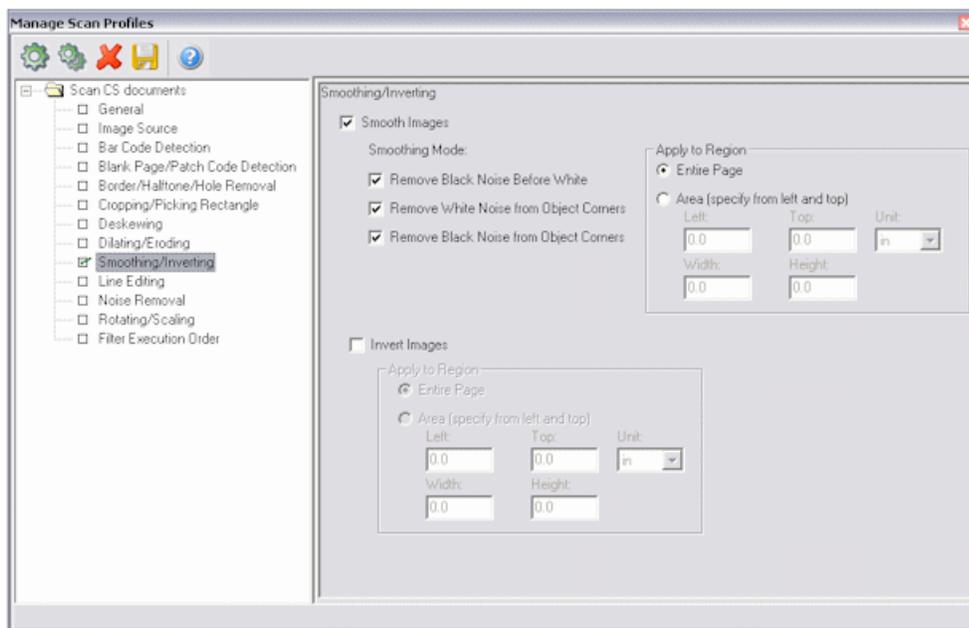
To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Dilating/Eroding** in the side pane.

Element	Description
Dilate Images	Select this field if you want images dilated, or the Erode Images field if you want images eroded. The dilating or eroding options become available.

Element	Description
Apply Filter	<p>Enter the number of times you want the dilation or erosion filter run.</p> <p>The default is 1. The dilation filter expands the area of black objects. The erosion filter removes details from images. Setting this value to more than 1 for either filter can cause significant portions of image content to be lost.</p>
Direction	<p>Choose the direction(s) in which you want dilation or erosion performed on images.</p> <p>You can choose Horizontal, Vertical or Diagonal. The default value is Horizontal and Vertical, which performs dilation or erosion in both the horizontal and vertical directions.</p>
Apply to	<p>Specify the image area you want dilated or eroded.</p> <p>Choose <b>Entire Page</b> to dilate or erode the page or <b>Area</b> to specify a particular area on the image. If you select <b>Area</b>, select a unit of measurement in the Unit field and specify the area from the left and top in the Left, Top, Width and Height fields.</p>

### 11.1.9 Manage Scan Profiles, Smoothing/Inverting Options

Use this screen to delete bumps and spurs from text characters or objects on images (Smoothing filter) and to invert images (Inverting filter). For more information, see "Smoothing and Inverting" on page 1-6.



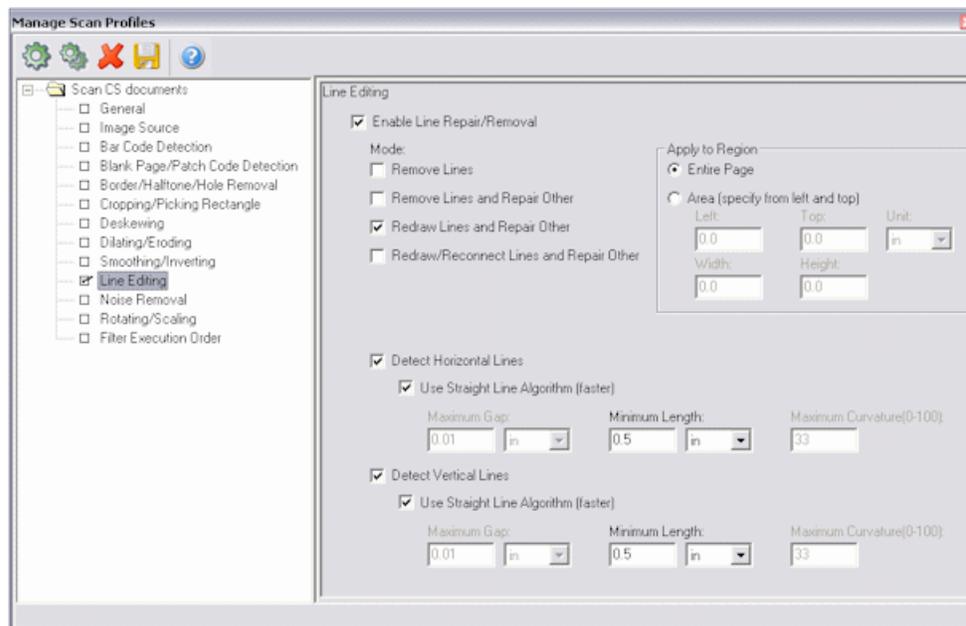
Element	Description
Smooth Images	Select this field if you want images smoothed.

Element	Description
Smoothing Modes	Select one or more modes. <ul style="list-style-type: none"> <li>■ <b>Remove Black Noise Before White:</b> Select this field to remove black noise pixels before removing white ones. If this field is not selected, white noise pixels are removed before black ones.</li> <li>■ <b>Remove White Noise from Object Corners:</b> Select this field to remove black noise pixels from the corners of objects.</li> <li>■ <b>Remove Black Noise from Object Corners:</b> Select this field to remove white noise pixels from the corners of objects.</li> </ul>
Invert Images	Select this field if you want images inverted.
Apply to Region	Specify the image area you want smoothed or inverted. Choose <b>Entire Page</b> to smooth or invert the page, or <b>Area</b> to specify a particular area on the image. If you select <b>Area</b> , select a unit of measurement in the Unit field and specify the area from the left and top in the Left, Top, Width and Height fields.

To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Smoothing/Inverting** in the side pane.

### 11.1.10 Manage Scan Profiles, Line Editing Options

Use this screen to remove and optionally redraw straight lines on form-type images. For more information, see "[Line Editing](#)" on page 1-7.



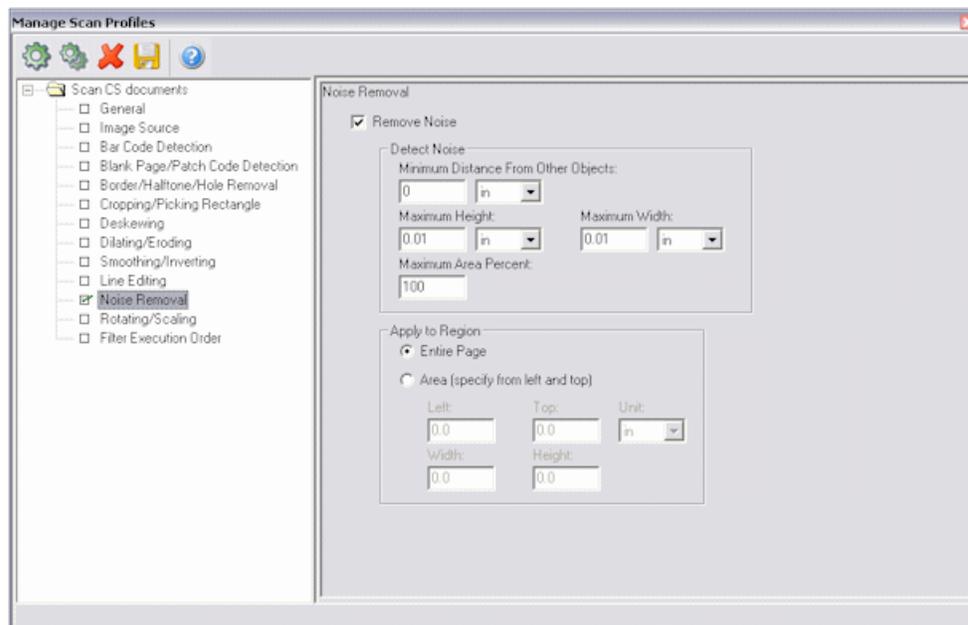
To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Line Editing** in the side pane.

Element	Description
Enable Line Repair/Removal	Select this field if you want lines edited.

Element	Description
Mode	<p>Select one or more editing modes.</p> <ul style="list-style-type: none"> <li>■ <b>Remove Lines:</b> Select this field to remove lines only.</li> <li>■ <b>Remove Lines and Repair Other:</b> Select this field to remove lines and repair graphics and text overlapped by the removed lines.</li> <li>■ <b>Redraw Lines and Repair Other:</b> Select this field (default) to remove lines, repair overlapped graphics and text, and redraw straight lines in place of removed lines.</li> <li>■ <b>Redraw/Reconnect Lines and Repair Other:</b> Select this field to remove lines, redraw straight lines and reconnect lines that were previously connected. This option is useful for tables and forms.</li> </ul>
Apply to	<p>Specify the image area on which you want lines edited.</p> <p>Choose <b>Entire Page</b> to edit lines on the page or <b>Area</b> to specify a particular area on the image. If you select <b>Area</b>, select a unit of measurement in the <b>Unit</b> field and specify the area from the left and top in the <b>Left</b>, <b>Top</b>, <b>Width</b> and <b>Height</b> fields.</p>
Detect Horizontal Lines, Detect Vertical Lines	<p>Select these fields to detect horizontal and/or vertical lines.</p> <p>You must detect either horizontal or vertical lines.</p>
Use Straight Line Algorithm	<p>Select this field to optimize straight line processing.</p> <p>This algorithm provides faster processing of straight lines longer than 100 pixels, and is particularly well-suited for forms and light paper. By default, this field is selected.</p> <ul style="list-style-type: none"> <li>■ If this algorithm is used, the Line Editing filter uses the height or width of the bounding rectangles around line-like objects to determine whether objects are lines.</li> <li>■ If the algorithm is NOT used, the filter breaks line-like objects into small segments and uses the curvature, maximum gap, and other fixed settings to determine whether segments make up lines.</li> </ul> <p>Note: When this field is selected, all other Detect Horizontal or Vertical Lines settings except the Minimum Length values are ignored.</p> <ul style="list-style-type: none"> <li>■ <b>Minimum Length:</b> Enter the minimum length of horizontal or vertical lines to detect. Specify the units (inches, centimeters or pixels) in the adjacent field.</li> <li>■ <b>Maximum Gap:</b> Enter the maximum white space allowed between two horizontal line-like or two vertical line-like objects for them to be considered a single line.</li> <li>■ <b>Maximum Curvature:</b> Enter the maximum deviation from a straight line allowed for a horizontal line-like or vertical line-like object to be considered a line. Enter an integer from 0 to 100, where 0 indicates no curvature (straight lines) and the default value is 33, which describes medium to high curvature.</li> </ul>

### 11.1.11 Manage Scan Profiles, Noise Removal Options

Use this screen to set the Noise Removal filter to detect and remove noise. You do this by defining the maximum space an object can occupy within a specified area in order to be considered noise. For more information, see "[Noise Removal](#)" on page 1-7.

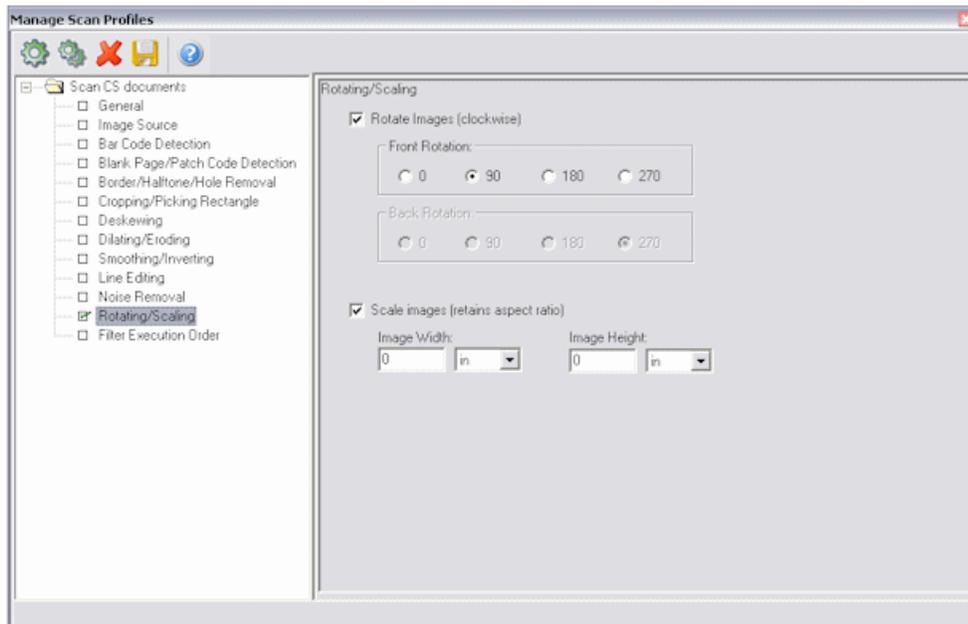


To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Noise Removal** in the side pane.

Element	Description
Remove Noise	Select this field to activate noise removal options.
Detect Noise	Specify how you want noise detected on images. Scan removes noise objects that fit within the Maximum Height, Maximum Width and Maximum Area Percent field values. <ul style="list-style-type: none"> <li> <b>Minimum Distance From Other Objects:</b> Enter the minimum separation between a noise object and other non-noise parts of the image. In the adjacent field, select a unit of measurement (inches, centimeters or pixels). If this field is set to 0, small text elements on the page such as broken characters, period marks and the dots on the letters i and j may be considered noise and be removed. Setting this field to a value greater than zero (such as 0.01 inches) will prevent these elements near text characters from being detected as noise and may improve OCR accuracy. </li> <li> <b>Maximum Height:</b> Enter an object's maximum height in order to be considered noise. The default value is 0.01 inches (1/100 of an inch). </li> <li> <b>Maximum Width:</b> Enter an object's maximum width in order to be considered noise. The default value is 0.01 inches (1/100 of an inch). </li> <li> <b>Maximum Area Percent:</b> Enter the maximum area an object can occupy (within the area defined by the maximum noise width and height) to be considered noise. Enter a percentage from 1 to 100. The default value is 100 (for 100%). </li> </ul>
Apply to	Specify the image area form which you want noise removed. Choose <b>Entire Page</b> to remove noise on the page or <b>Area</b> to specify a particular area on the image. If you select Area, select a unit of measurement in the Unit field and specify the area from the left and top in the Left, Top, Width and Height fields.

### 11.1.12 Manage Scan Profiles, Rotating/Scaling Options

Use this screen to rotate images in 90 degree increments (Rotating filter) or resize images to a specified width and height (Scaling filter). For more information, see ["Rotating and Scaling"](#) on page 1-8.

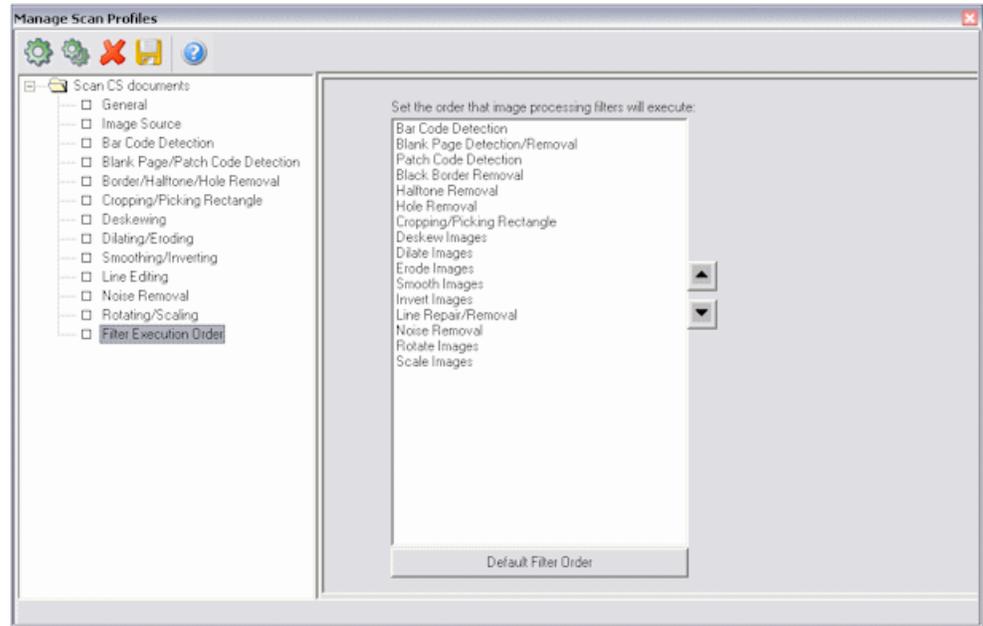


To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Rotating/Scaling** in the side pane.

Element	Description
Rotate Images	Select this field to rotate images.
Rotate	Choose how you want images rotated. You can choose 0 (default), 90° clockwise, 180° clockwise or 270° clockwise. Note that you can specify a rotation for front and back sides, if needed.
Scale Images	Select this field to scale images.
Image Width, Image Height	Specify a new image width and height and select a unit of measurement (inches, centimeters or pixels). Images will be resized so that they fit within the boundaries of the new width and height. If the width or height is larger than the scaled image area, then images are centered along that dimension and white margins are added. For example, if you start with an 8.5x11 inch image and want to scale it to 8.5x5.5 inches, then the image area will be scaled to 4.25x5.5 inches with 2.125 inches left and right white margins added to make the final scaled image 8.5 inches wide.

### 11.1.13 Manage Scan Profiles, Filter Execution Order Options

Use this screen to change the order in which the filters are run or restore the default order.



To display this screen, select **Manage Scan Profiles** from the Scanning menu, then select **Filter Execution Order** in the side pane.

Element	Description
Up, Down	Click the Up button to move a selected filter up in the list, and the Down button to move it down.
Default Filter Order	Click this button to return the filters to the default order.

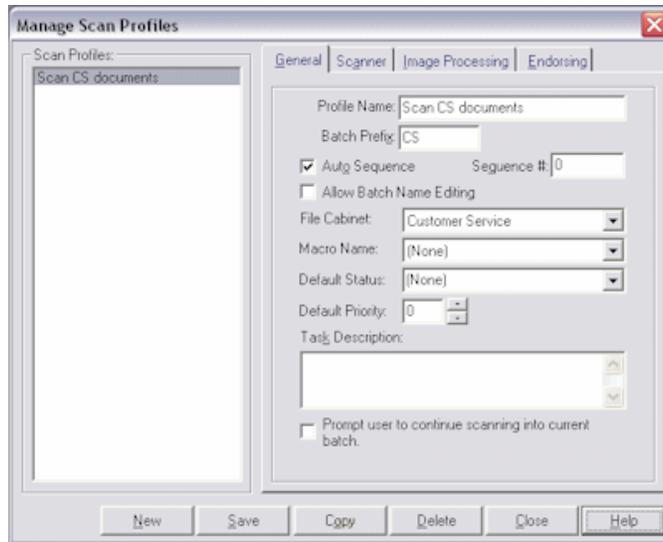
## 11.2 Scan For Adrenaline Screens

The following screens are used in Scan for Adrenaline administration.

- ["Manage Scan Profiles, General Tab"](#) on page 11-19
- ["Manage Scan Profiles, Scanner Tab"](#) on page 11-21
- ["Manage Scan Profiles, Image Processing Tab"](#) on page 11-22
- ["Manage Scan Profiles, Endorsing Tab"](#) on page 11-45

### 11.2.1 Manage Scan Profiles, General Tab

Use the General tab to set general settings for a scan profile.



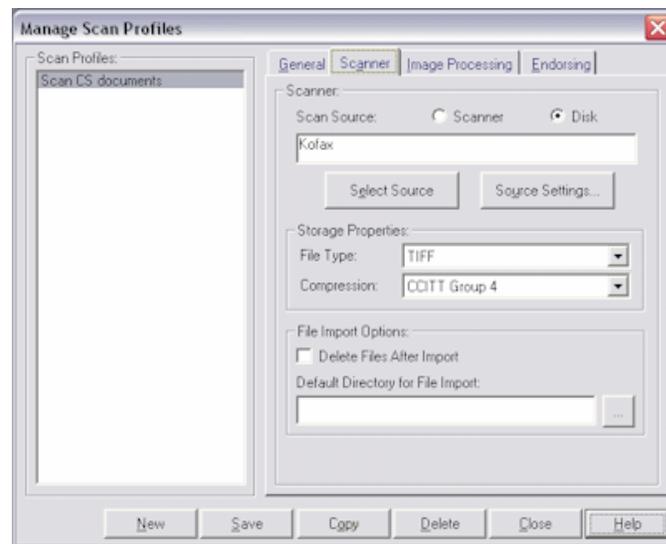
To display this screen, select **Manage Scan Profiles** from the Scanning menu and select the General tab.

Element	Description
Profile Name	Enter a name for the scan profile that describes the documents to be scanned using it. Users will see this name when selecting a scan profile.
Batch Prefix	<p>Enter a prefix (optional). If you include a prefix, scanning users see this name in the Batch Scanning screen's Batch Name field after they select a scan profile. You can type up to eight characters.</p> <p>A batch prefix is typically used when the Auto Sequence field (see next step) is checked. Scan names batches for the user by combining the prefix with an auto sequence number that increments by one with each batch. For example, if you enter CORR as a prefix for correspondence, Scan might automatically name batches CORR000000000001, CORR000000000002, CORR000000000003, and so on.</p>
Auto Sequence/Sequence Number	<p>When Auto Sequence is checked, Scan names batches for users by combining the prefix with an auto sequence number that increments by one with each batch. Enter the number you want used to start naming batches in the Sequence # field. For example, if you enter INV as the batch prefix and 1 in the Sequence # field, the first batch would be named INV0000000000001, the second would be INV0000000000002, and so on. These options are available when a batch prefix is specified.</p> <p>Note: To prevent conflicts between multiple Scan workstations, append a workstation identifier after the batch prefix (for example, CORRA, CORRB, and CORRC).</p>
Allow Batch Name Editing	Select this field to allow users to enter a batch name in the Batch Scanning screen's Batch Name field prior to scanning. This option is available only if the Auto Sequence field is selected. If this field is deselected (the default), users cannot enter batch names at scan time. Note that users can rename batches in the Batch Scanning screen after they are scanned, regardless of this setting.

Element	Description
File Cabinet	Select the file cabinet to which you want batches assigned. This field lists all file cabinets available. This is the file cabinet from which the batches will be indexed and then committed into your document management system.
Macro Name	If special Scan customization is needed using a macro, select the macro in this field.
Default Status, Default Priority	Specify a status and/or priority to be assigned to batches when they are created.  Users can change the status and priority you select here. You define statuses in the Capture Administration screen.
Task Description	Enter optional instructions for the scanning user.  Scanning users will see this message in the Task Description field after selecting the scan profile in the Batch Scanning screen. (This field is displayed to users only if you include an entry.)  For example, you may want to remind the user to check that the documents are properly collated and that all staples have been removed before scanning.
Prompt user to continue scanning into current batch	This field determines what happens when the scanner's feeder tray runs out of paper.  If you select this field, users will be given the choice to continue scanning into the current batch when they add more paper to the scanner. If this field is not checked (the default), the batch is completed and the user must click <b>Begin Scanning</b> again to start a new batch.

## 11.2.2 Manage Scan Profiles, Scanner Tab

Use this tab to configure a scanner or disk source and specify how images are stored in Capture.



To display this screen, select **Manage Scan Profiles** from the Scanning menu and select the Scanner tab.

Element	Description
Scan Source	<p>Specify the scan source. After a scan source is selected, its name is displayed in this field.</p> <ul style="list-style-type: none"> <li>■ <b>Scanner:</b> Select this option to scan images using the scanner configured in a scan source.</li> <li>■ <b>Disk:</b> Select this option to import rather than scan images using options configured in a disk source. When users click the Begin Scanning button in the Batch Scanning screen, a standard file dialog box displays, prompting them to select files to import. Scan supports multiple disk sources.</li> </ul> <p>Note: To enable image processing settings, you must configure a scan or disk source with image processing.</p>
Select Source	<p>Choose a scan or disk source. A source must be defined by the Kofax Source Manager (KSM) using the KSM (32-bit) icon from the control panel. Refer to Kofax documentation for instructions on setting up a scan or disk source, and configuring properties and advanced settings.</p>
Source Settings	<p>Click this button to configure scanner settings. Scan automatically detects the capabilities of the selected scanner and selects default values, which you can adjust. Available settings depend on the selected scanner. See the documentation that came with the scanner for more information.</p> <p>In general, set your scanner settings so they accommodate most of the documents being scanned using the selected scan profile. Keep in mind that scanning users can override a profile's scanner settings without changing the profile, then select the profile again at any time to reload the default profile settings.</p>
File Type	<p>Select the format in which you want images stored. You can choose TIFF (default), JPEG, PCX, or BMP. Because files are larger when stored in PCX and BMP formats, TIFF is recommended for black and white documents and JPEG is recommended for color documents.</p> <p><b>Note:</b> This setting affects the format in which images are stored in Capture's batch folder. Using commit profile options, you can output images in a different format when committing them, as described in "<a href="#">Commit Profile Settings Screen</a>" on page 13-9.</p>
Compression	<p>Choose a compression method for images. Image compression substantially reduces file size; uncompressed images can exceed 1MB. The compression options available depend on your File Type field selections (described above).</p>
Delete Files After Import	<p>Select this field to delete images from the import directory as they are imported.</p>
Default Directory for File Import	<p>Enter the default path where the images are located. Users can change this location when importing files.</p>

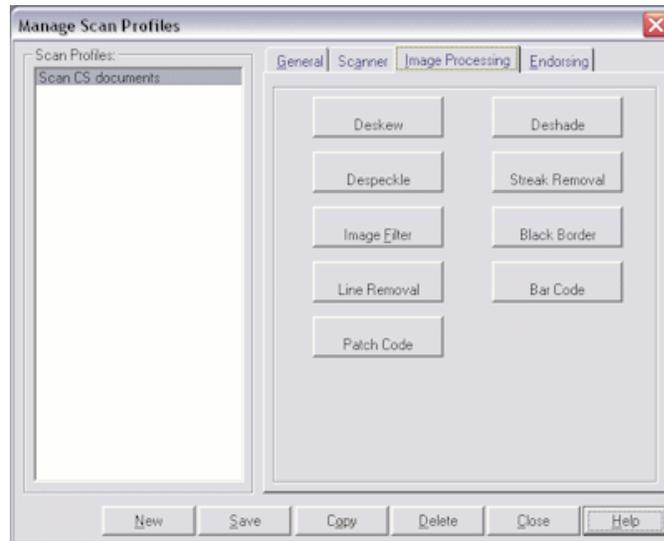
### 11.2.3 Manage Scan Profiles, Image Processing Tab

Use the Image Processing tab to select precise settings to make images easier to read, reduce file sizes and improve processing. This section describes in detail image processing options you can select for scan profiles.

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**Note:** Image processing options require a version of Kofax Adrenaline engine that supports image processing.

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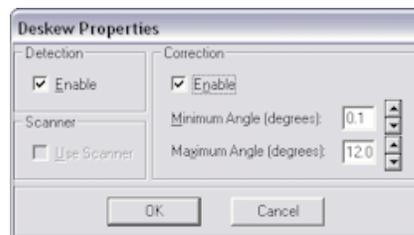
To display this screen, select **Manage Scan Profiles** from the Scanning menu and select the Image Processing tab. A light bulb displays next to options that are enabled for this profile.

Image processing options include:

- "Deskew" on page 11-23
- "Despeckle" on page 11-24
- "Image Filters" on page 11-25
- "Line Removal" on page 11-29
- "Patch Code" on page 11-32
- "Deshade Properties" on page 11-35
- "Streak Removal" on page 11-37
- "Black Border" on page 11-38
- "Bar Codes Properties" on page 11-39

### 11.2.3.1 Deskew

Deskew is the process of straightening a crooked or skewed image.



To display the Deskew Properties dialog box, select **Manage Scan Profiles** from the Scanning menu, select the Image Processing tab and click **Deskew**.

Element	Description
Enable	Select this field to correct the angle of skewed images.
Minimum Angle	<p>Select the minimum amount of skew that must be corrected.</p> <p>For example, if the image is skewed 5 degrees and you select a minimum angle of 2 degrees, the skew is corrected. If the image is skewed less than the minimum angle value, no correction is performed. To specify the minimum angle, click the arrows or type the value. The value you can select depends on the setting for the maximum skew angle.</p> <p>Minimum Angle Example: If the maximum skew angle is set to 10 degrees, the highest allowable value for the minimum skew angle is 9.9 degrees.</p>
Maximum Angle	<p>Select the maximum amount of skew that must be corrected.</p> <p>For example, if the image is skewed 10 degrees and you select a maximum angle of 15 degrees, the skew is corrected. If the image is skewed more than the maximum angle value, no correction is performed. To specify the maximum angle, click the arrows or type the value. The value you can select depends on the setting for the minimum skew angle.</p> <p>Maximum Angle Example: If the minimum skew angle is set to 15 degrees, the lowest allowable value for the maximum skew angle is 15.1 degrees.</p>

### Tips For Deskewing Images

Follow these tips:

- Both skew detection and skew correction must be enabled for images to be deskewed.
- Correcting heavily skewed images can affect performance
- The skew calculation requires a source image that has a horizontal and vertical flow, such as text or lines. A skew calculation for an image that consists mostly of lines with no horizontal or vertical flow (for example, a picture) can return an invalid skew angle.

### 11.2.3.2 Despeckle

The despeckle feature removes unwanted dots or speckles on an image.



To display the Despeckle Properties dialog box, select **Manage Scan Profiles** from the Scanning menu, select the Image Processing tab and click **Despeckle**.

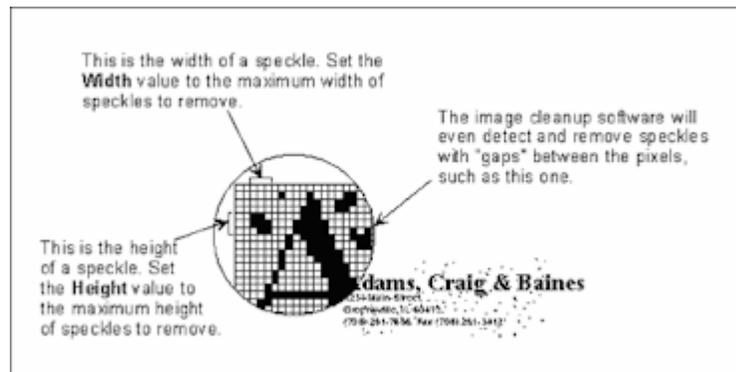
Field or Button	Description
Enable	Select this field to enable the Despeckle filter.

Field or Button	Description
Height, Width	Select the maximum height and width of a speckle to be removed  All speckles with a height and width less than or equal to the Height and Width settings are removed. You can select any value between 1 and 32 pixels. Even speckles with gaps are detected and removed.

### Tips For Despeckling Images

Follow these tips:

- Set the Height and Width options to the appropriate values for your image. Using large values for these options could remove portions of your image that you want to keep.
- Check your image to ensure that punctuation marks (such as commas, periods, and quotation marks) are not being removed. If they are, adjust the values of the Height and Width properties.



### 11.2.3.3 Image Filters

Use Image filters to enhance line edges, smooth characters, and remove background noise on an image.

To display the Image Filter Properties dialog box, select **Manage Scan Profiles** from the Scanning menu, select the Image Processing tab and click **Image Filters**. Select the Enable field to activate the selected filter.



Image filters include:

- ["Character Smoothing"](#) on page 11-26
- ["Thinning Filter"](#) on page 11-27

- "Thicken Filter" on page 11-27
- "Smooth and Clean" on page 11-27
- "Fill Line Breaks" on page 11-28
- "Smooth, Clean and Preserve H-V Lines" on page 11-28
- "Fill Line Breaks and Preserve H-V Lines" on page 11-28
- "Light Thicken Filter" on page 11-29
- "Outline" on page 11-29

### Tips For Using Image Filters

Follow these tips:

- Character Smoothing always has a positive effect on an image. You can use this filter in combination with any other image filter.
- The combination of deshade, despeckle, line removal, and the Smooth and Clean image filter produces better results than using just the Smooth and Clean image filter. However, the Smooth and Clean image filter should not be used as an alternative to deshade, despeckle, and line removal.
- The combination of deshade, despeckle, and the Smooth, Clean, and Preserve h&v lines image filter produces better results than using just the Smooth, Clean, and Preserve h&v lines filter. The Smooth, Clean, and Preserve h&v lines filter should not be used as an alternative to deshade and despeckle.
- Thinning should only be applied to images that contain elements that are ballooned or blended together. Applying this filter to an image that does not contain such elements may cause the loss of important data.
- Light Thicken should be applied to images that have been deshaded and despeckled. Using this filter may exaggerate background noise. The Light Thicken filter is less aggressive than the Thicken filter.
- Thicken should be applied to images that have been deshaded and despeckled. Using this filter may exaggerate background noise. Thicken should only be applied to images that contain thin or light elements (such as images containing dot matrix characters or fax images). Applying this filter to an image that does not contain such elements may cause characters and lines to blend together.
- Fill Line Breaks is recommended for use with images that contain lines. However, it may cause parallel lines that are separated by only one pixel to be merged. For images that contain parallel lines that are close together, the Fill Line Breaks and Preserve h&v lines filter should be used instead.
- Fill Line Breaks and Preserve h&v lines is recommended for use with images that contain lines that are close together (separated by only one pixel).

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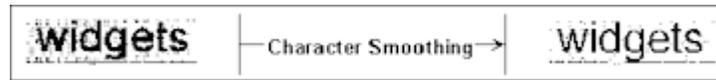
**Note:** When using the image filters, it is recommended that you process a test image to determine the best settings for your file cabinet/application. The default settings, which have been calibrated for typical, real-world images, should work in most cases. If adjustments are necessary, they should be made carefully to achieve the desired results.

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#### 11.2.3.3.1 Character Smoothing

This filter smooths characters and lines.



Features of the Character Smoothing filter:

- No negative impact on the image.
- Increases legibility.
- Consistently reduces compressed file sizes by 10 to 15 percent.

This filter considers the color of the four perpendicular pixels of every pixel in the source image. If the majority of the four perpendicular pixels have the color opposite from the pixel's color, the color of the pixel is changed to match that of its neighbors.

#### 11.2.3.3.2 Thinning Filter

This filter thins characters and lines and may remove background noise.



Features of the Thinning filter:

- May have a negative impact on the image.
- Good for character separation (for elements that are ballooned or blended together).
- May reduce compressed file size.

This filter thins down image elements by setting any black pixel to white if it is perpendicular or diagonally adjacent to at least one white pixel in the source image.

#### 11.2.3.3.3 Thicken Filter

This filter thickens characters and lines and may exaggerate background noise.



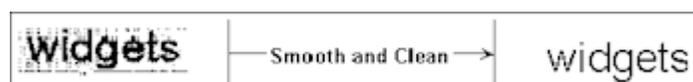
Features of the Thicken filter:

- May have a negative impact on the image.
- Good for dot matrix characters or for enhancing fax images (for thin or light elements).
- May increase compressed file size.

This filter thickens image elements by setting any white pixel to black if it is perpendicular or diagonally adjacent to at least one black pixel in the source image.

#### 11.2.3.3.4 Smooth and Clean

This filter smooths characters, removes background noise, and may eliminate lines.



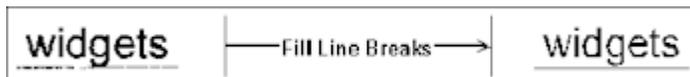
Features of the Smooth and Clean filter:

- Usually has a positive impact on the image.
- Increases legibility.
- Increases OCR accuracy.
- Consistently reduces compressed file sizes by at least 10 to 15 percent.

This filter is faster than using the Thinning filter followed by a Light Thicken filter, but has exactly the same effect. It sets any black pixel to white if it cannot be considered part of at least a 2x2 block of black pixels in the source image.

#### 11.2.3.3.5 Fill Line Breaks

This filter fills in and smithies lines.



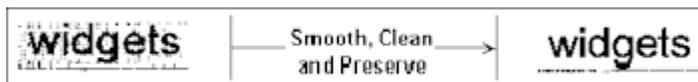
Features of the Fill Line Breaks filter:

- May have a negative impact on the image because parallel lines close together may be merged.
- May increase legibility.
- May increase compressed file size.

This filter sets any pixel to black if it cannot be considered part of at least a 2x2 block of white pixels in the source image.

#### 11.2.3.3.6 Smooth, Clean and Preserve H-V Lines

This filter smithies characters and lines and removes background noise.



Features of the Smooth, Clean + preserve h&v lines filter:

- Usually has a positive impact on the image.
- Increases legibility.
- Increases OCR accuracy.
- Consistently reduces compressed file sizes by at least 10 to 15 percent.

This filter is identical to the Smooth and Clean filter except that it preserves horizontal and vertical black line segments that are one pixel wide.

#### 11.2.3.3.7 Fill Line Breaks and Preserve H-V Lines

This filter fills in and smithies lines while maintaining the interline gap.



Features of the Fill Line Breaks + preserve h&v lines:

- Can have a positive impact on the image because parallel lines close together are not merged.

- Increases legibility.
- May increase compressed file size.

This filter is identical to the Fill Line Breaks filter except that it preserves horizontal and vertical white line segments that are at least one pixel wide.

#### 11.2.3.3.8 Light Thicken Filter

This filter thickens characters and lines and may exaggerate background noise, but is not as aggressive as the Thicken filter.



Features of the Light Thicken filter:

- May have a negative impact on the image.
- Good for dot matrix characters or for enhancing fax images (for thin or light elements).
- May increase compressed file size.

This filter is a less aggressive version of the Thicken filter. It performs approximately half the thickening of the full Thicken filter.

#### 11.2.3.3.9 Outline

This filter extracts an outline of all image elements.



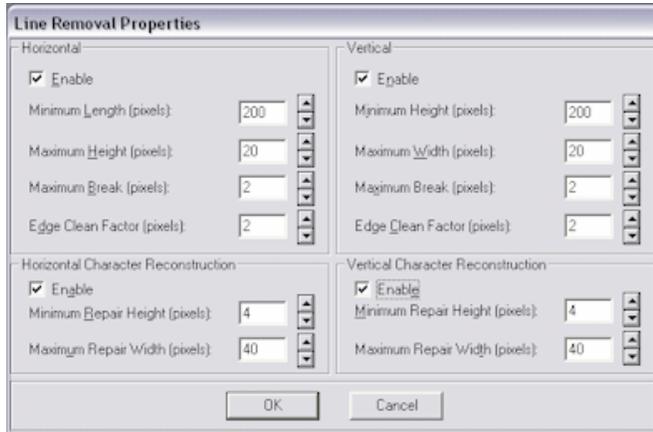
Features of the Outline filter:

- May have a negative impact on the image.
- Decreases compressed file size.

#### 11.2.3.4 Line Removal

Use the line removal feature to remove horizontal and/or vertical lines or to repair text that intersects the lines that are removed.

To display the Line Removal Properties dialog box, select **Manage Scan Profiles** from the Scanning menu, select the Image Processing tab and click **Line Removal**.



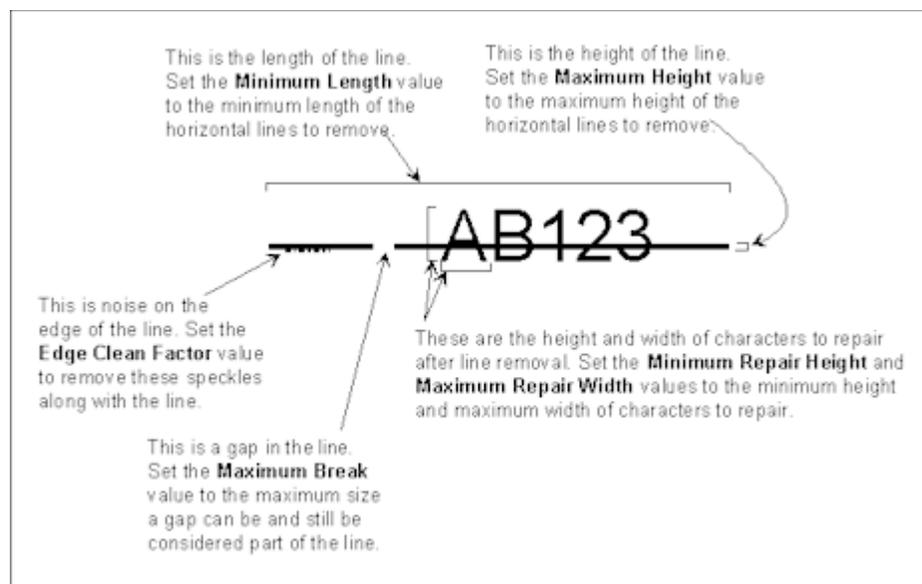
Element	Description
Horizontal	<p>Select this field to remove horizontal lines from images.</p> <ul style="list-style-type: none"> <li>■ <b>Enable:</b> Select this field to enable the horizontal line removal feature.</li> <li>■ <b>Minimum Length:</b> Select the minimum length, in pixels, of a horizontal line to remove.</li> <li>■ <b>Maximum Height:</b> Select the maximum height, in pixels, of a horizontal line to remove.</li> <li>■ <b>Maximum Break:</b> Select a value to use for determining if a white speckle detected in a black line is white noise or the end of the line.</li> <li>■ <b>Edge Clean Factor:</b> Select an edge cleanup factor, in pixels, to use during a line removal operation. Typically, a certain amount of black noise (random black speckles) exists on the edges of lines on an image. When a line is removed, this noise remains and leaves unwanted speckles on the image. Specifying a line edge clean factor removes these unwanted speckles.</li> </ul>
Vertical	<p>Select this field to remove vertical lines from images.</p> <ul style="list-style-type: none"> <li>■ <b>Enable:</b> Select this field to enable the vertical line removal feature.</li> <li>■ <b>Minimum Height:</b> Select the minimum height, in pixels, of a vertical line to remove.</li> <li>■ <b>Maximum Width:</b> Select the maximum width, in pixels, of a vertical line to remove.</li> <li>■ <b>Maximum Break:</b> Select a value, in pixels, to use for determining if a white speckle detected in a black line is white noise or the end of a line.</li> <li>■ <b>Edge Clean Factor:</b> Select an edge cleanup factor to use during a line removal operation. Typically, a certain amount of black noise (random black speckles) exists on the edges of lines. When a line is removed, this noise remains and leaves unwanted speckles on the image. Specifying a line edge clean factor removes these unwanted speckles.</li> </ul>

Element	Description
Horizontal Character Reconstruction	<p>Select this field to help rebuild and repair text that intersects with removed lines.</p> <ul style="list-style-type: none"> <li>■ <b>Enable:</b> Select this field to enable the horizontal character reconstruction feature.</li> <li>■ <b>Minimum Repair Height:</b> Select the minimum height, in pixels, of a character to repair during character reconstruction after a horizontal line removal.</li> <li>■ <b>Maximum Repair Width:</b> Select the maximum width, in pixels, of a character to repair during character reconstruction after a horizontal line removal.</li> </ul>
Vertical Character Reconstruction	<p>Select this field to help rebuild and repair text that intersects with removed lines.</p> <ul style="list-style-type: none"> <li>■ <b>Enable:</b> Select this field to enable the vertical character reconstruction feature.</li> <li>■ <b>Minimum Repair Height:</b> Select the minimum height, in pixels, of a character to repair during character reconstruction after a vertical line removal.</li> <li>■ <b>Maximum Repair Width:</b> Select the maximum width, in pixels, of a character to repair during character reconstruction after a vertical line removal.</li> </ul>

### Tips For Removing Horizontal Lines

Follow these tips:

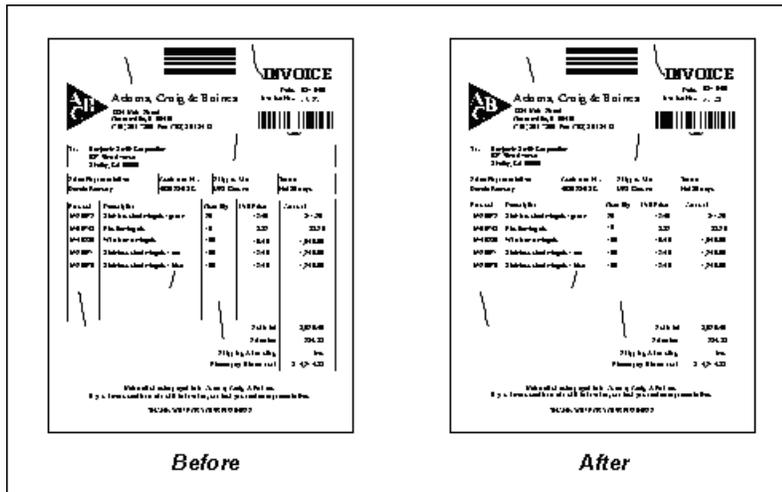
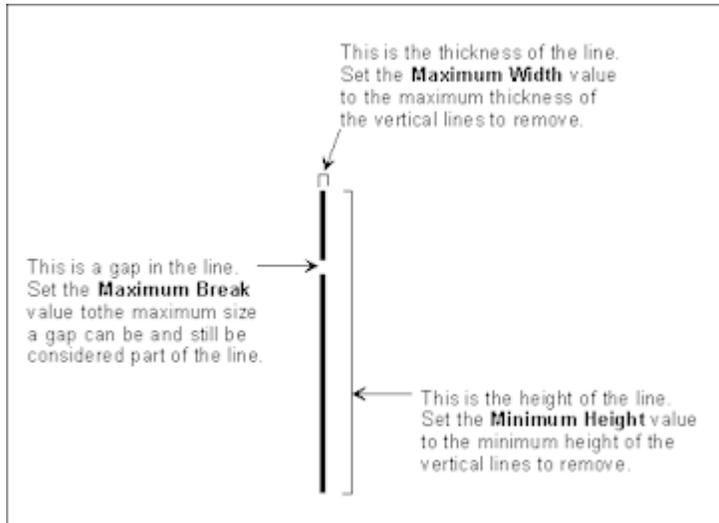
- Set the Minimum Length parameter to a large enough value so that text objects (such as the horizontal bar of the letter T) are not mistaken for horizontal lines. Setting a larger value also allows the software to work faster because many objects, such as text, can be ignored when searching for lines.
- Set the Maximum Break parameter to a maximum value of 2 or 3 pixels at 200 dpi. Doing this helps prevent text from being considered a line.



### Tips For Removing Vertical Lines

Follow these tips:

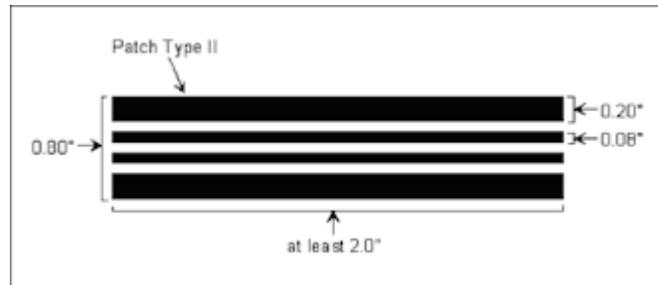
- Set the Minimum Height parameter to a large enough value so that text objects (such as the vertical bar of the letter T) are not mistaken for vertical lines. Setting a larger value also allows the algorithm to work faster because many objects, such as text, can be ignored when searching for lines.
- Set the Maximum Break parameter to a maximum value of 2 or 3 pixels at 200 dpi. Doing so helps prevent text from being considered a line.



### 11.2.3.5 Patch Code

All patch codes are made up of narrow and wide bars:

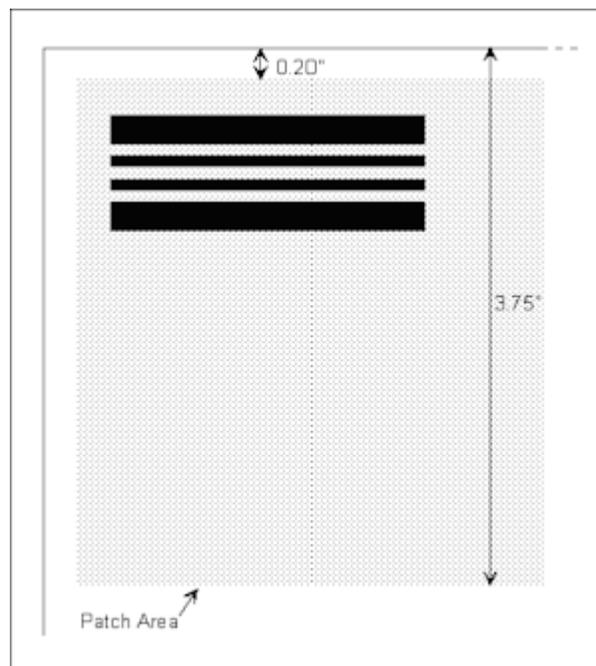
- The narrow bars must be 0.08 inch in height.
- The wide bars must be 0.20 inch in height.
- The entire patch code must be 0.80 inch in height.
- The entire patch code should be at least 2.0 inches in width.



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**Note:** As an alternative to using patch codes, you can specify that a bar code be interpreted as a patch code, as well as being used as a bar code. This might be useful, for example, if there is always a bar code on the first page of each document. For more information, see the Interpret Bar Code as Patch Code field described in "[Bar Codes Properties](#)" on page 11-39.

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### Patch Code Types



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**Note:** In compliance with the patch code specification for duplex scanning operations, patch codes are only detected on the front side of a page. Any patch codes on the backside of a page are ignored.

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### Patch Code Properties (Advanced)



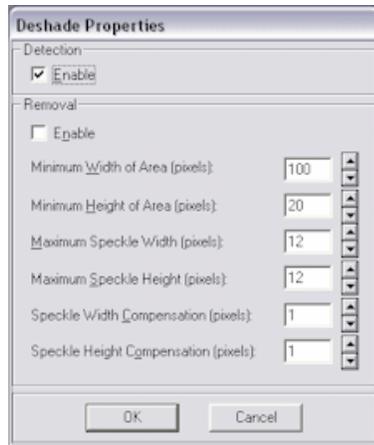
To display the Patch Code Properties (Advanced) dialog box, select **Manage Scan Profiles** from the Scanning menu, select the Image Processing tab and click **Patch Code**.

Element	Description
Enable	Select this field to enable the patch code detection feature.
Left Offset to Center of Patch Code	<p>Select a value from the left edge of the page that defines a point that falls near the center of the patch code. The offset value allows the patch code detection feature to quickly locate the patch code on the page. This offset can be any value between 0 and the maximum page width, in inches. A value of 0 specifies searching anywhere in the horizontal direction for a patch code. To be detected, patch codes must be positioned correctly on the page (see below):</p> <ul style="list-style-type: none"> <li>■ The patch code must be horizontal.</li> <li>■ It must be located at least 0.20 inches from the leading edge of the image. It must not extend beyond 3.75 inches from the leading edge of the image.</li> </ul>
Stop on Patch Code	<p>In addition to being used as document separators, patch codes can be used as triggers to stop the scanner while scanning, if your scanner supports this feature. Using patch codes to stop the scanner can be useful for changing scanner settings on-the-fly between batches.</p> <p>Note: This feature is not available when processing images from disk.</p> <p>To use patch codes to stop the scanner, patch code detection must be enabled. The scanner is stopped when the patch code is detected, allowing the scanner settings to be changed.</p> <p>Patch codes are read before any other image processing takes place. Patch code detection takes place twice: once before image processing occurs and once after. If the patch code is not found before image processing occurs, the scanner does not stop.</p>
Enable Scan Stop	Select this field to enable the patch code trigger feature.
Available	Displays all of the patch code types that can be used to stop a scanner.
In Use	<p>Displays all of the patch code types that are currently configured to stop a scanner:</p> <ul style="list-style-type: none"> <li>■ To add a patch code type to the In Use field, double-click on the patch code type in the Available field.</li> <li>■ To remove a patch code type from the In Use field, double-click on the patch code type.</li> </ul>

#### 11.2.3.6 Deshade Properties

Shaded areas on an image are made up of patterns of black speckles. Deshading removes the speckles that make up the shaded area while preserving the text inside the shaded area. Removing shaded areas helps to reduce compressed file sizes.

To remove shaded areas from an image, define the characteristics of the shaded areas you want to remove by specifying their height and width and the size of the speckles in them. Any text that displays within a shaded area is preserved.



To display the Deshade Properties dialog box, select **Manage Scan Profiles** from the Scanning menu, select the Image Processing tab and click **Deshade**.

Element	Description
Enable	Select this field to remove shaded areas on an image.
Minimum Width of Area	Enter the minimum width in pixels of the shaded area on an image to be removed.
Minimum Height of Area	Enter the minimum height in pixels of the shaded area on an image to be removed.
Maximum Speckle Width	Enter the maximum width in pixels of a speckle within a shaded area.
Maximum Speckle Height	Enter the maximum height in pixels of a speckle within a shaded area.
Speckle Width Compensation	<p>Enter a positive or negative horizontal adjustment value for the size of a speckle in pixels to remove when deshading an image. This adjustment value accounts for horizontal differences in speckle sizes within a shaded area. The adjustment value is added to the detected Speckle Width of the speckles in the shaded area to determine which speckles are to be removed.</p> <p>Set this property to 1 to remove all speckles in the shaded area up to the detected Maximum Speckle Width plus 1 pixel. Conversely, set this property to -1 to remove all speckles in the shaded area up to the detected Maximum Speckle Width minus 1 pixel. For example, if the deshade algorithm detects a shaded area with a speckle size of 3, it removes speckles in the shaded area that have a width less than or equal to 4.</p>
Speckle Height Compensation	Same as the Speckle Width Compensation setting, but you set the height instead of the width.

### Tips For Deshading

Follow these tips:

- Set the Minimum Width of Area and Minimum Height of Area as large as possible without making the values larger than the smallest shaded area you want to detect. For example, if all shaded areas you want to remove are 5 inches wide and 2 inches tall, you should set Minimum Height of Area to 1.5 inches and Minimum Width of Area to 4.5 inches. Setting these values too small (less than 1 inch) could cause the deshade algorithm to detect text as shaded areas.

- Leave the Maximum Speckle Width and Maximum Speckle Height at their default values. The defaults should be sufficient to detect most shaded areas.
- Set the Speckle Width Compensation and Speckle Height Compensation to 0 (the default) or 1. The defaults should be sufficient for most speckles in the detected shaded areas.

This is the height of a speckle in the shaded area. Set the **Maximum Speckle Height** value to the maximum height of speckles to remove.

This is the width of a speckle in the shaded area. Set the **Maximum Speckle Width** value to the maximum width of speckles to remove.

This is the height of the shaded area. Set the **Minimum Height of Area** value to the minimum height of the shaded areas to remove.

This is the width of the shaded area. Set the **Minimum Width of Area** value to the minimum width of the shaded areas to remove.

The speckles in a shaded area are not necessarily the same size and shape. Set **Speckle Width Compensation** and **Speckle Height Compensation** to an adjustment value of 1 pixel so that speckles that are 1 pixel larger than the detected speckle size can be removed.

*Before*

*After*

### 11.2.3.7 Streak Removal

Use the Streak Removal options to remove streaks from images.



To display the Streak Properties dialog box, select **Manage Scan Profiles** from the Scanning menu, select the Image Processing tab and click **Streak Removal**.

Element	Description
Enable	Select this field to activate the streak removal feature. The streak removal feature processes each horizontal scan line of the image to detect runs of black pixels. Any series of black pixels less than or equal to the streak width are removed. Although streak removal processes the image from left to right, its main purpose is to eliminate vertical streaks.
Streak Width	Select the width of the streaks to remove. Any vertical lines with a width less than or equal to the value of the Streak Width setting are removed. For typical images, set the Streak Width to a value of 1 or 2 pixels. Since streak removal looks for any series of like pixels less than or equal to the streak width, setting the width too high could have an adverse effect on the image by eliminating data.

### 11.2.3.8 Black Border

The black border removal feature transforms any black borders to white, thereby producing a cleaner image for processing and readability, and reducing compressed file sizes.



To display the Black Border Properties dialog, select **Manage Scan Profiles** from the Scanning menu, select the Image Processing tab and click **Black Border**.

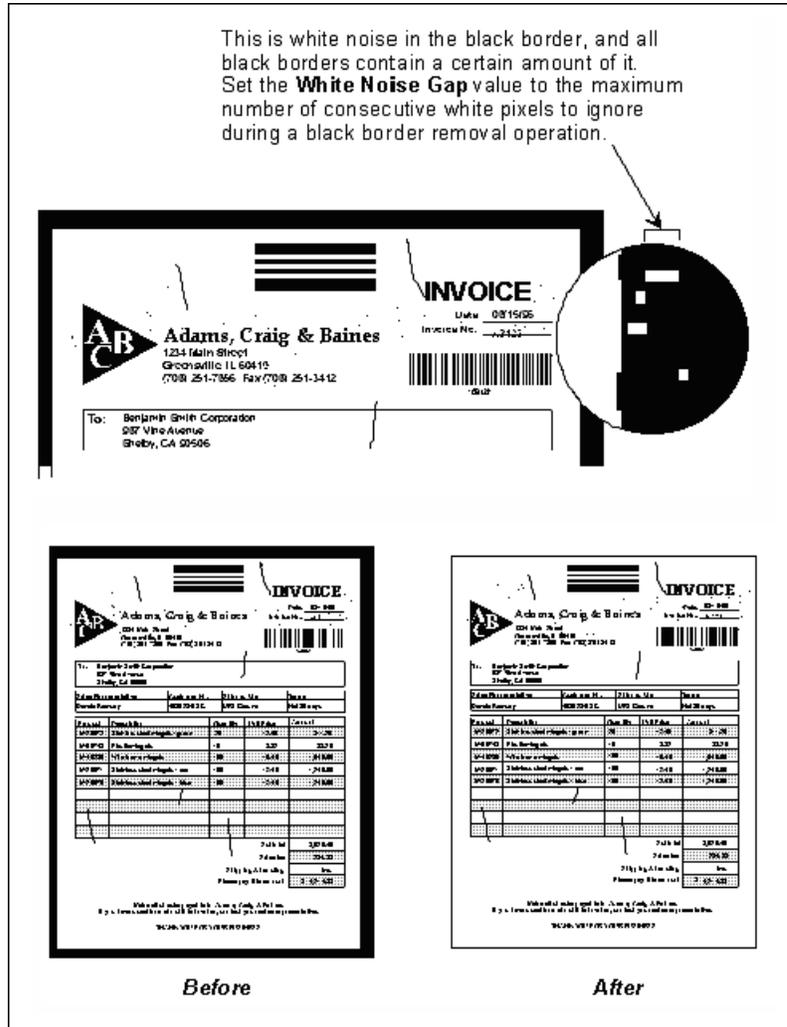
Element	Description
Enable	Select this field to enable the black border removal feature.
Crop	Adjusts the image size (height and width) after black border removal.
White Noise Gap	Select a value, in pixels, from 0 to 10 for the White Noise Gap.

### White Noise Gap

As soon as it detects a white pixel, Scan uses the following logic to determine whether the white pixel is part of white noise in the border or the edge of the image:

- If a series of white pixels in the black border is less than or equal to the value of the White Noise Gap, it is considered white noise. In this case, the white noise is ignored and the black border removal process continues.
- If the number of consecutive white pixels is greater than the White Noise Gap, it is considered the end of the border and the black border removal process stops.

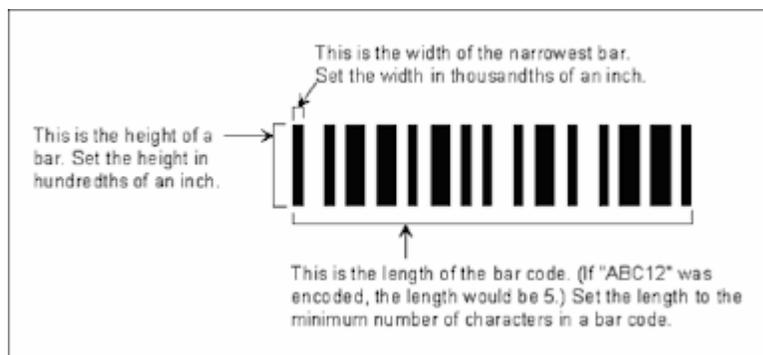
For best results when removing a black border, make sure you do not set the value of the White Noise Gap too low. This prematurely stops the black border removal process. If any portion of the black border is not removed, increase the value of the White Noise Gap.



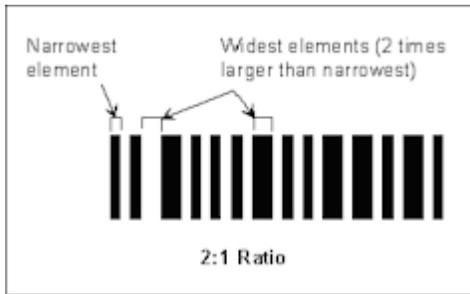
### 11.2.3.9 Bar Codes Properties

Use the Bar Code setting to detect bar codes on an image and convert them to their ASCII equivalents. During a bar code recognition operation, the image is searched for possible bar codes. If a potential bar code is found, it is examined to determine if it satisfies all of the requirements as outlined in the settings. For example, the physical characteristics of the bar code, such as bar code type and minimum number of characters in the bar code are checked against the settings.

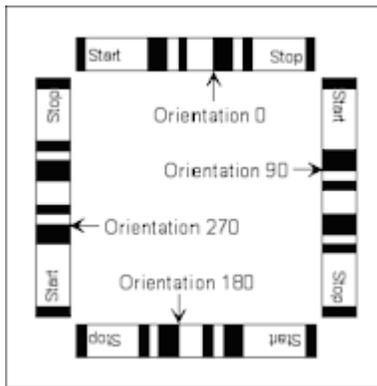
#### Bar Size



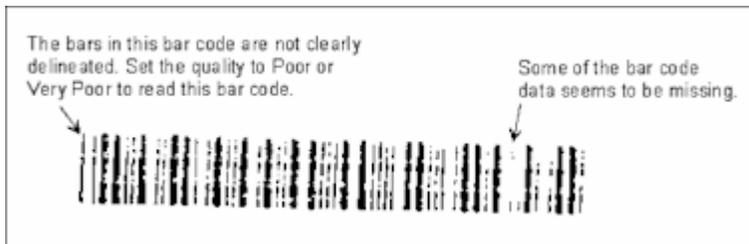
### 2 to 1 Ratio

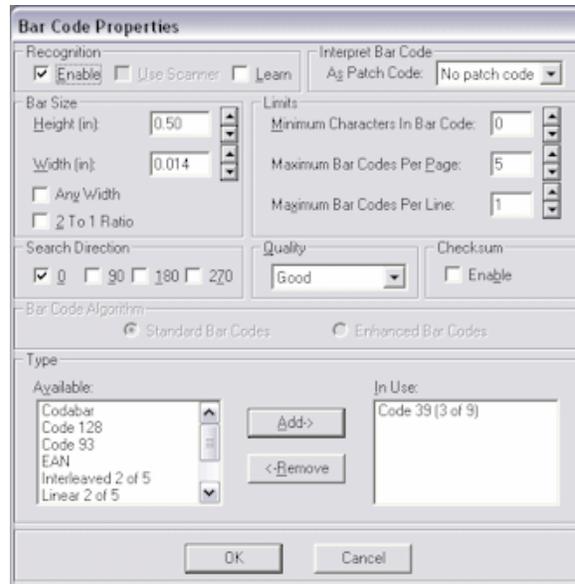


### Search Direction



### Quality





To display the Bar Code Properties dialog box, select **Manage Scan Profiles** from the Scanning menu, select the Image Processing tab and click **Bar Codes**.

Element	Description
Recognition	<p>Specify how you want bar codes recognized.</p> <ul style="list-style-type: none"> <li> <b>Enable:</b> Select this field to enable bar code recognition.         </li> <li> <b>Learn:</b> Select this field to enable the bar code recognition <i>learn</i> feature. This feature dynamically determines the most appropriate values associated with bar codes on an image. It uses the selected bar code type(s) and search direction(s) to detect bar codes on the current image, and updates the Height, Width, Ratio, and Quality fields.         </li> <li> <b>Use Scanner:</b> If your scanner supports internal bar code recognition, the Use Scanner option may be available. Select this field to obtain the bar code values from the scanner.         </li> </ul>
Interpret Bar Code as Patch Code	<p>Allows you to specify that the detection of a bar code should trigger a patch code as well as return the bar code value. This might be useful, for example, if there is always a bar code on the first page of each document.</p>

Element	Description
Bar Size	<p>Specify the bar code's size. (Refer to the Bar Size illustration in this section.)</p> <ul style="list-style-type: none"> <li>■ <b>Height:</b> The height of a bar code is the distance between the top and the bottom of the bars. The height is measured in hundredths of an inch (See illustration below.)</li> <li>■ <b>Width:</b> The width is the physical thickness of the narrowest bar in a bar code. The width is used in conjunction with the ratio setting to calculate the widths of the larger bar. The width of a bar is measured in thousandths of an inch. Most bar widths fall within the following ranges: 0.010 - 0.013 at 200 dpi, 0.014 - 0.018 at 300 dpi.  For optimal read accuracy rates, the bar width should be specified as close as possible to the actual width. While the bar code driver compensates for some discrepancy, specifying an accurate width can improve performance. If the width is unknown, the Any Width option should be selected. Doing so causes the bar code driver to dynamically determine the bar width as it searches for potential bar codes. However, it may adversely affect performance. The best way to determine the actual bar width is to use the Learn feature.</li> <li>■ <b>Any Width:</b> This option searches for bar codes of any width. Use this if you do not know the actual width of the bar code. However, this may adversely affect performance.</li> <li>■ <b>2 to 1 Ratio:</b> Some bar code types support an optional ratio between the narrowest element and the larger elements in the code. (See the 2 to 1 Ratio illustration in this section.) For these bar code types, the width of the larger element is a multiple of the width of the narrowest element as shown in the illustration below. The easiest way to determine the ratio is to use the Learn feature.  The ratio setting only works with the following bar code types: Codabar, Code 39, Code 93, Interleaved 2 of 5, and Linear 2 of 5. It is ignored for all other bar code types.</li> </ul>
Limits	<p>If multiple bar codes exist on an image, you can specify the maximum number of bar codes to be returned. Bar codes are returned in the order they are found.</p> <ul style="list-style-type: none"> <li>■ <b>Minimum Characters in Bar Code:</b> Selects the minimum number of bar code characters (digits) that must be found before a bar code value is considered valid.</li> <li>■ <b>Maximum Bar Codes Per Page:</b> Selects the maximum number of bar codes that can be on a single page. Once the maximum number is reached, the bar code algorithm stops searching for bar codes.</li> <li>■ <b>Maximum Bar Codes Per Line:</b> Selects the maximum number of bar codes that can be located along a single line on the page. Once the maximum number is reached, the bar code algorithm stops searching for bar codes.</li> </ul>

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Element	Description
Search Direction	<p>The bar code driver searches for bar codes in a linear fashion, probing the search area for potential bar codes. (Refer to the Search Direction illustration in this section.) For horizontal bar codes with an orientation of 0, for example, it works down the image starting on the left edge and probing toward the right edge. For vertical bar codes, it works across the image starting on the top edge and probing top to bottom. Bar codes can be orientated on an image in four general directions as described below. If you select all options, a search for bar codes in all orientations is performed.</p> <ul style="list-style-type: none"><li>■ 0: Horizontal, rotated 0 degrees, read left to right.</li><li>■ 90: Vertical, rotated 90 degrees to the right, read top to bottom.</li><li>■ 180: Horizontal, rotated 180 degrees to the right, read right to left.</li><li>■ 270: Vertical, rotated 270 degrees to the right, read bottom to top.</li></ul> <p><b>Note:</b> Searching for bar codes in all orientations may reduce scan performance.</p>
Quality	<p>The quality of a bar code refers to the condition of the bar code elements on an image. (Refer to the Quality illustration in this section.) For example, sometimes the bar code elements are well defined with the black bars being clearly delineated and very little noise existing on the image. Other times, the black bars are too light or noise exists in the bar code's quiet zone. These factors can affect the bar code driver's accuracy rate. You can indicate the quality of the bar codes being read by setting the quality to Good, Normal, or Poor.</p> <ul style="list-style-type: none"><li>■ If the bar code elements on an image have smooth edges and are free of noise, set the quality to Normal.</li><li>■ If the bar code elements have jagged edges or other characteristics that might make them hard to read, adjust the quality setting to Poor. See below for an example of a poor quality bar code. Setting the quality to poor increases the number of probes made to read the bar codes. This increases the read accuracy rate, but adversely affects performance.</li></ul>
Checksum	<p>If the bar codes contain a checksum, select the Enable field to cause the bar code reader to automatically verify the checksum. Some bar codes contain a checksum character. The checksum is usually the last character in the bar code, and is used by the bar code recognition driver to determine the validity of the bar code. (The checksum is only used to determine if a bar code is valid; it is not returned as part of the bar code data.) Not all bar code types support a checksum character. Of the bar code types that do, some support a mandatory checksum, while others support an optional checksum.</p> <ul style="list-style-type: none"><li>■ If selected, the last character in the bar code is treated as a checksum character. If the checksum fails, the bar code data is not returned. If the checksum succeeds, the bar code data is returned.</li><li>■ If deselected, the last character of the bar code is treated as bar code data.</li></ul> <p><b>Note:</b> Optional checksum verification only works with these bar code types: Code 39, Interleaved 2 of 5, and Linear 2 of 5. It is ignored for all other bar code symbologies.</p>

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Element	Description
Type	<p>The Type group displays a list of the available bar codes and those that are currently in use.</p> <ul style="list-style-type: none"> <li>■ <b>Available:</b> The Available field displays all of the bar code types that can be read and decoded. The following bar code symbologies are supported: Codabar, Code 128, Code 39 (3 of 9), Code 93, EAN, Interleaved 2 of 5, Linear 2 of 5, Postnet, UPC-A, and UPC-E.</li> <li>■ <b>In Use:</b> The In Use field displays all of the bar code types that are currently configured for decoding.</li> </ul> <p>To add a bar code type to the In Use category, double-click on the name in the Available field.</p> <p>To remove a bar code type from the In Use category, double-click on the name.</p> <p>Note: Some bar code types are mutually incompatible; you cannot select them together. The incompatible types are: Interleaved 2 of 5 and Linear 2 of 5, UPC-A and EAN, UPC-A and UPC-E, and Postnet and any other type.</p>

### Tips For Improving Bar Code Recognition

Follow these tips:

- Adjust the bar height and quality to increase the number of search probes. As the height is decreased, the number of probes is increased. Doing this allows more areas on an image to be probed.
- Adjust the width setting.
- Adjust the density setting for the scanner. If the bars appear too light, increase the density setting. If the bars appear too thick, decrease the density setting.
- Adjust the dpi setting for the scanner. Scanning at a higher resolution usually improves the accuracy of the driver. Even a slight adjustment, from 200 to 240 dpi, for example, can make a difference.
- When using a Bell+Howell ACE scanner, set the scan mode to Text/Line Art and the Sensitivity setting to S4. Using other ACE settings can cause the scanner to widen some bar codes in the direction the paper is moving or split some bar codes in two. Code 128 and Codabar bar code types are particularly susceptible to these problems.

### Tips For Optimizing Bar Code Detection Speed

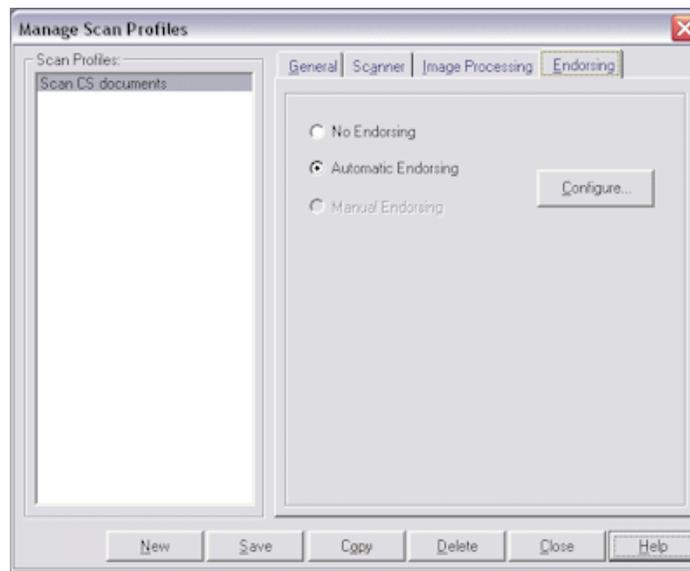
Follow these tips:

- Increase the height of the search probe by adjusting the height and quality settings. The speed of the bar code driver increases proportionately. For example, if the search height is made twice as large, the bar code driver will be twice as fast.
- Increase the height of the search probe by adjusting the height and quality settings. The speed of the bar code driver increases proportionately. For example, if the search height is made twice as large, the bar code driver will be twice as fast.
- Specify only the required search directions. The bar code driver searches in all specified directions, even if no bar codes exist. For example, if all of the bar codes on an image are horizontal with an orientation of 0 degrees and you set all search directions, the bar code driver searches all directions.

- Specify only those types of bar codes that you want to find. For example, if all the bar codes on an image are Code 128, don't force the bar code driver to search for Code 128 and Code 39.
- Specify the minimum number of characters in a bar code. This allows the bar code driver to quickly dismiss ineligible objects.
- Set the maximum number of bar codes on a line to as small a value as possible. This allows the driver to stop searching a line when the appropriate number of bar codes is read.
- Set the maximum number of bar codes on a page to as small a value as possible. This allows the driver to stop searching on a page when the appropriate number of bar codes is read.

### 11.2.4 Manage Scan Profiles, Endorsing Tab

Use the Endorsing tab to select settings for endorsing (imprinting) document pages as they are scanned.

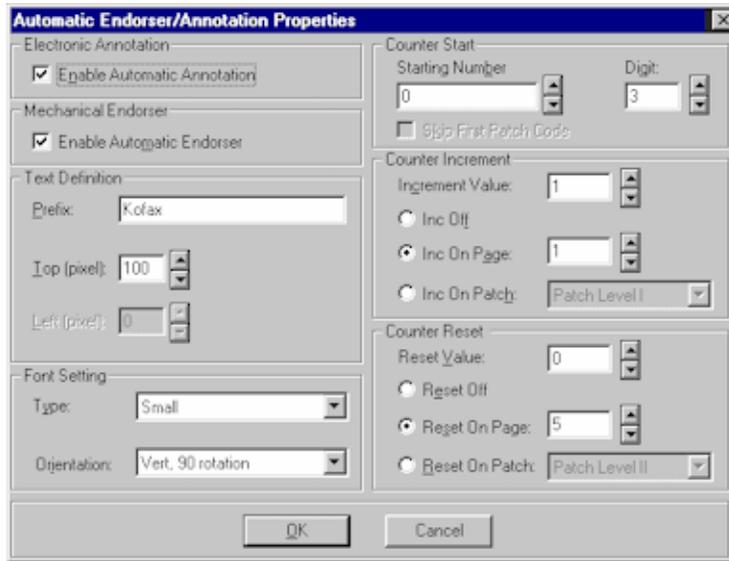


To display this screen, select **Manage Scan Profiles** from the Scanning menu and select the Endorsing tab.

Element	Description
No Endorsing/Automatic Endorsing/Manual Endorsing	Select an endorsing option. Note: This setting depends on the endorsing option your scanner supports. In addition, your scanner determines the available endorsing options. Refer to your scanner documentation for more information.
Configure	Click to configure automatic or manual options. If you selected Automatic, the Automatic Endorser/Annotation Properties dialog box is displayed, described below. If you selected Manual, see the Endorser dialog box described below.

#### Automatic Endorser/Annotation Properties

Use this dialog box to configure automatic endorsement properties.



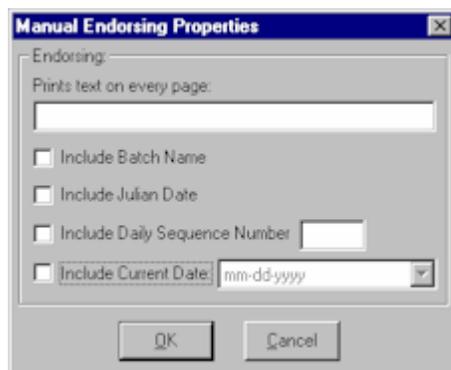
To display this dialog box, select **Manage Scan Profiles** from the Scanning menu, and select the Endorsing tab. Choose **Automatic Endorsing** and click **Configure**.

Element	Description
Enable Automatic Annotation	Select this field to enable automatic annotation. Electronic annotation refers to a process in which the software adds a value to the image, but not the physical paper.
Enable Automatic Endorser	Select this field to enable automatic endorsing. Mechanical endorsing refers to a physical imprinter in the scanner.
Text Definition	Complete settings. <ul style="list-style-type: none"> <li>■ <b>Prefix:</b> Enter a prefix (alpha or numeric) for the endorsing string. Refer to your scanner documentation to determine the maximum number of characters. Include the prefix when determining string length.</li> <li>■ <b>Top:</b> Enter the top position of the endorsement string in pixels.</li> <li>■ <b>Left:</b> Enter the left position of the endorsement string in pixels.</li> </ul>
Font Setting	Complete settings <ul style="list-style-type: none"> <li>■ <b>Type:</b> Select the font size for the endorsing text.</li> <li>■ <b>Orientation:</b> Select the direction for the endorsing text.</li> </ul>
Counter Start	Complete settings <ul style="list-style-type: none"> <li>■ <b>Counter Start:</b> Select a starting number (greater than zero) for the endorsing string. This number is only used at the start of the first batch.</li> <li>■ <b>Digit:</b> Enter the maximum number of characters in the counter. The number of digits plus the number of characters in the Prefix determine the length of the string. If you enter 3, the maximum value for the counter will be 999. If you enter 6, the maximum value for the counter will be 999,999.</li> <li>■ <b>Skip First Patch Code:</b> Select this option if you want to skip the first detected patch code. This is only available if you are resetting your counter with patch codes.</li> </ul>

Element	Description
Counter Increment	<p>Complete settings</p> <ul style="list-style-type: none"> <li>▪ <b>Increment Value:</b> Select or enter an increment value for the counter.</li> <li>▪ <b>Inc Off:</b> Select this option to turn off the counter.</li> <li>▪ <b>Inc On Page:</b> Enter the number of pages to be scanned before the counter is incremented by the value entered in the Increment Value field.</li> <li>▪ <b>Inc On Patch:</b> Select this option to increment the counter when a specified patch code type is detected. Select the patch code type from the list.</li> </ul>
Counter Reset	<p>Complete settings.</p> <ul style="list-style-type: none"> <li>▪ <b>Reset Value:</b> Enter a reset value for the counter. Whenever the counter is reset, it resets to this value.</li> <li>▪ <b>Reset Off:</b> Turn off the counter reset.</li> <li>▪ <b>Reset on Page:</b> Select this option and enter the number of pages scanned before the counter resets. It will reset to the value entered in the Reset Value field.</li> <li>▪ <b>Reset on Patch:</b> Select this option to reset the counter when a specified type of patch code is detected. Select the patch code type from the list.</li> </ul>

### Endorser

Use this dialog box to set manual endorsing options.



To display this dialog box, select **Manage Scan Profiles** from the Scanning menu, and select the Endorsing tab. Choose **Manual Endorsing** and click **Configure**.

Element	Description
Prints text on every page	Enter the text you want displayed on each page.
Include	Select the fields corresponding to items you want displayed with the endorsement. For example, to include the date, select the <b>Include Current Date</b> field and select a date format from the field to its right.

## 11.3 Indexing Screens

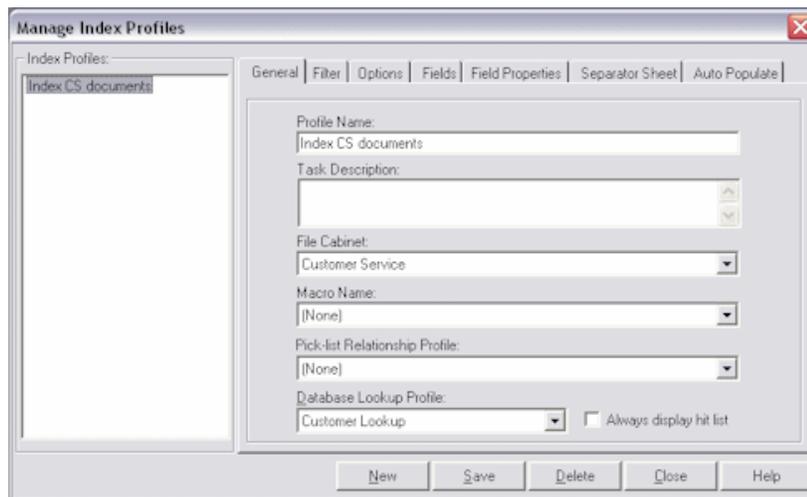
Index includes the following screens and dialog boxes:

- ["Manage Index Profiles Screen, General Tab"](#) on page 11-48

- ["Manage Index Profiles, Filter Tab"](#) on page 11-49
- ["Manage Index Profiles, Options Tab"](#) on page 11-50
- ["Manage Index Profiles, Fields Tab"](#) on page 11-51
- ["Manage Index Profiles, Field Properties Tab"](#) on page 11-52
- ["Manage Index Profiles, Separator Sheet Tab"](#) on page 11-57
- ["Manage Index Profiles, Auto Populate Tab"](#) on page 11-59
- ["Zone Editor"](#) on page 11-60

### 11.3.1 Manage Index Profiles Screen, General Tab

Use this tab to select general settings for the index profile.



Element	Description
Profile Name	Replace the default name of <Index Profile 1> by typing a descriptive name for the index profile. This name will be displayed to indexing users selecting a profile.
Task Description	Type instructions for the indexing user, who sees this message when selecting the index profile.
File Cabinet	Select a file cabinet. The file cabinet helps determine which batches are available for indexing. In addition, the file cabinet determines where the documents will be stored.
Macro Name	Select a previously created macro to use with this index profile (optional). (For more information about macros, see the <i>Developer's Guide for Oracle Document Capture</i> .)
Pick-list Relationship Profile	Select a pick-list relationship profile to apply to the index profile, if needed. See <a href="#">"About Pick-list Relationships"</a> on page 2-4

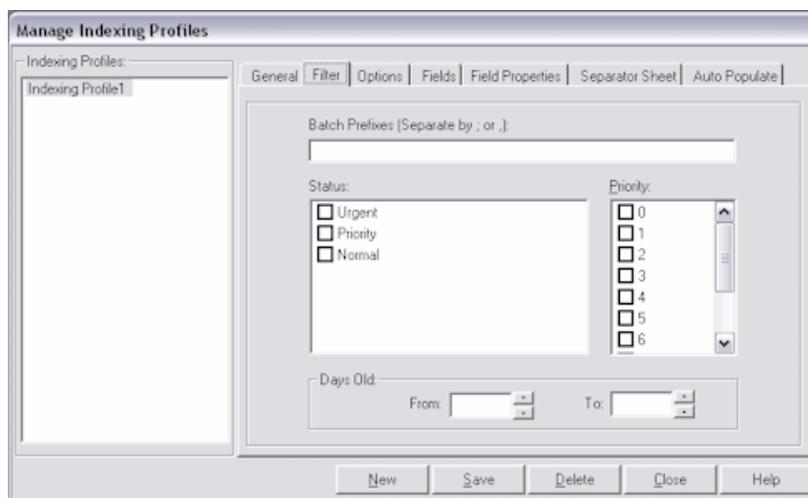
Element	Description
Database Lookup Profile	<p>Select a database lookup profile to apply to the index profile, if needed. For more information about database lookup profiles, see "<a href="#">About Database Lookups</a>" on page 2-5. Select the <b>Always display hit list</b> field if you want the hit-list to be displayed even when only a single database record is returned. If this field is NOT selected (the default), Capture displays a hit list only when more than one matching record is found.</p> <p><b>Note:</b> You might want to include database lookup instructions to the user in the Help Text field on the Field Properties tab. For example, you might include the following: <i>Enter the first few letters of the customer's name, then click the Database Search button.</i> These instructions are displayed to users in the status bar in the lower left of the screen.</p>

To display this screen, select **Manage Index Profiles** from the Indexing menu, then select the General tab.

### 11.3.2 Manage Index Profiles, Filter Tab

Use this tab to limit the batches users can see and access in the Batch Indexing screen when they select the index profile. You can filter batches by prefix, assigned status and/or priority or by batch age.

**Note:** Users will see only the batches that meet ALL filters you apply. For example, if you enter a batch prefix and select a status, only batches with the specified batch prefix AND the selected status are displayed. However, selecting multiple options within a filter is different. For example, if you select priorities 1, 2 and 3, batches with an assigned priority of 1, 2 OR 3 will be displayed, provided they meet other filters' criteria.

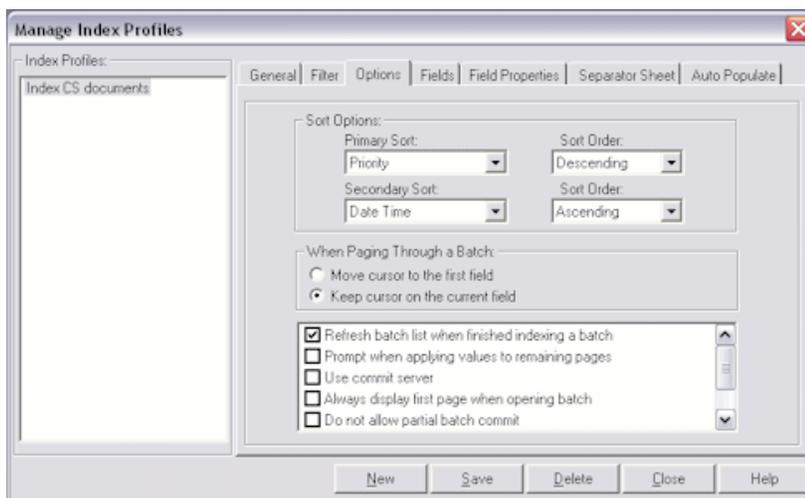


To display this screen, select **Manage Index Profiles** from the Indexing menu, then select the Filter tab.

Element	Description
Batch Prefixes	Specify the prefix(es) for batches you want available for this profile. When the user selects this index profile, he or she will see batches with this prefix listed.  You can type up to eight characters per prefix. Separate multiple prefixes with a semi-colon or comma. Leave this field blank if you want all batches in the selected file cabinet available to users.
Status	Select the statuses of batches you want available for this profile.
Priority	Select the priorities of batches you want available for this profile.
Days Old (From/To)	Specify a range of days (i.e., days since batches were created) for batches you want available for this profile.

### 11.3.3 Manage Index Profiles, Options Tab

Use this tab to select options that control how documents are indexed using the selected index profile.



To display this screen, select **Manage Index Profiles** from the Indexing menu, then select the Options tab.

Element	Description
Sort Options	Specify how batches are to be ordered when users select an index profile in the Batch Indexing screen. You can select a primary and secondary sort option, and select ascending or descending sorting for each option. In the profile shown above, Index will display batches for the selected profile first by priority (from highest to lowest), and secondly by their date and time (from least recent to most recent).
When Paging Through a Batch	Specify how you want the cursor to behave when users move to other pages in batches. You can set the cursor to either <b>move to the first field</b> or <b>remain on the current field</b> .
Refresh batch list when finished indexing a batch	When selected (the default), Index automatically updates the batch list display when the user returns to it after committing a batch. If deselected, users must click the Refresh button to update the batch list display.

Element	Description
Prompt when applying values to remaining pages	Select this field to prompt the user before applying index values to other pages in the document. When deselected (the default), values are automatically applied without asking the user.
Use Commit Server	Select this field to use Commit Server for commit processing. Commit Server performs scheduled batch commit processing on a separate server, instead of on indexing users' workstations. Select this option only if you have installed Commit Server. See " <a href="#">About Commit Server</a> " on page 1-18 for more information.
Always display first page when opening batch	Select this field to display a batch's first page to users upon opening it. If deselected (the default), Capture displays the first unindexed page of a batch when opened.
Do not allow partial batch commit	Select this field to prevent committing until all pages in the batch have been indexed.
Prevent thumbnail support	Select this field to prevent users from displaying thumbnails. When checked, the toolbar's View button is disabled to users in the Indexing screen.
Open next batch upon complete commit	When selected, Capture automatically opens and displays the next available batch for indexing after all of the current batch's documents have been successfully committed. If deselected (the default), Capture displays the Batch Indexing screen instead.
Disable date field calendar	Select this field to prevent the pop-up calendar from displaying to users in date-type index fields. When deselected, a calendar displays when a user clicks the down arrow at the right of a date field. You may want to disable the calendar to prevent conflicts with input masks.
Fit to Window upon navigating to a different page	Select this field to display pages in Fit to Window mode whenever the user moves between them, even if the user changed magnification using the Zoom In or Zoom Out buttons. When not checked (default), the last selected magnification is used when the user displays a different page. This option can be useful when batches contain pages of varying sizes.
Allow auto populated field(s) to index page	Autopopulated fields can affect whether pages are considered indexed and therefore whether a field is sticky. This field works in conjunction with the Sticky field options on the Field Properties tab, as described in " <a href="#">Manage Index Profiles, Field Properties Tab</a> " on page 11-52.

### 11.3.4 Manage Index Profiles, Fields Tab

Use this tab to specify the index fields users will complete when indexing with the selected profile.

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**Note:** You can auto-populate any available field, regardless of whether you choose to display it to the user. (See "[Manage Index Profiles, Auto Populate Tab](#)" on page 11-59.)

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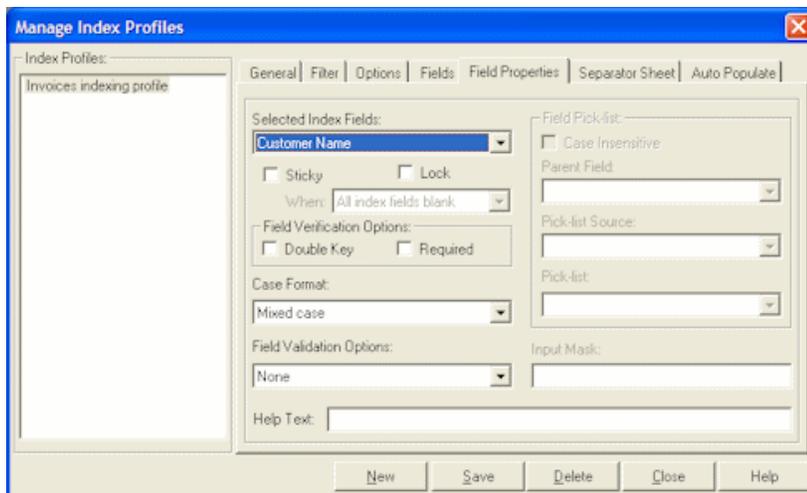


To display this screen, select **Manage Index Profiles** from the Indexing menu, then select the Fields tab.

Element	Description
Available Fields	Lists index fields defined for the selected file cabinet and available for selection.
Selected Fields	Lists index fields selected for user entry for this profile.
Left, Right Arrows	Click these buttons to move selected index fields between the Available Fields and Selected Fields boxes. <ul style="list-style-type: none"> <li>■ Click the single arrow buttons to move a selected field.</li> <li>■ Click the double arrow buttons to move all fields.</li> </ul>
Up, Down Arrows	Click these buttons to reorder the fields in the Selected Fields field. This determines the order in which the fields are displayed while indexing.

### 11.3.5 Manage Index Profiles, Field Properties Tab

This tab's options affect how users index images. You select an index field from those defined on the Fields tab and apply options to it, then select another index field and apply options to it, and so on.



To display this screen, select **Manage Index Profiles** from the Indexing menu, then select the Field Properties tab.

Element	Description
Selected Index Fields	Choose the index field you want to set properties for. This list includes all index fields selected on the Fields tab.
Sticky	Select this field to make the index field sticky. An indexing user types a value in an indexing field, then moves to the next page. If the field is sticky (and blank), the value typed is automatically pasted into that indexing field on each subsequent page he or she displays. Use the When field options to specify when the indexing field should be sticky. For details, see " <a href="#">Sticky Index Fields</a> " on page 1-15.
Lock	Select this field to make the index field locked. Locking a field prevents the indexing user from entering or changing its value. Note: This option is particularly useful when combined with a pick-list to ensure the user selects an existing pick-list item.
Field Verification Options	Use these options to help verify the user's data entry. You can choose: <ul style="list-style-type: none"> <li>▪ <b>Double Key:</b> Prompts the user to retype the value after leaving the field. If the two entries match, the cursor moves to the next index field; if they do not match, the index field is cleared and the user must type the value twice again until they match. This feature is typically used for dollar amount fields or other sensitive fields.</li> <li>▪ <b>Required:</b> Requires the user to enter a value in the selected index field. When a required field is blank, the user can move to other fields or pages, but when the batch is committed, the page will be left in the batch and not committed.</li> </ul>
Case Format	Specify how text is formatted when the user presses Tab to move to the next index field. You can choose: <ul style="list-style-type: none"> <li>▪ <b>Mixed Case</b> (default): Leaves text as typed.</li> <li>▪ <b>Upper Case:</b> Converts all text to uppercase.</li> <li>▪ <b>Lower Case:</b> Converts all text to lowercase.</li> </ul>
Field Validation Options	Use these options to affect how users enter or select values. You can choose None, Input Mask (see <a href="#">Table 11-1</a> and <a href="#">Table 11-2</a> ), Pick-list (see " <a href="#">About Pick-lists</a> " on page 2-4,) Bar Code Field (see " <a href="#">Applying Bar Code Values to Index Fields</a> " on page 1-15) or Input Format (see <a href="#">Table 11-3</a> and <a href="#">Table 11-4</a> ).
Help Text	Use this field to include procedural tips or instructions for users. Text you type here for this field is displayed to users in the status bar when they move the cursor to the field.

To set up a mask, choose **Input Mask** in the Field Validation Options field, then enter any of the available mask characters listed in [Table 11-1](#) into the Input Mask field that displays. Any other characters you type are displayed exactly as typed.

**Table 11-1** *Input Mask Characters*

Mask Character	Description
#	Requires a number to be entered.

**Table 11–1 (Cont.) Input Mask Characters**

Mask Character	Description
.	Decimal. The actual character used is whatever has been specified as the decimal placeholder in your Regional Settings (Windows Control Panel). This is treated as a literal.
,	Thousands separator. The actual character used is whatever has been specified as the thousands separator in your Regional Settings (Windows Control Panel). This is treated as a literal.
:	Time separator. The actual character used is whatever has been specified as the time separator in your Regional Settings (Windows Control Panel). This is treated as a literal.
/	Date separator. The actual character used is whatever has been specified as the date separator in your Regional Settings (Windows Control Panel). This is treated as a literal.
\	Treat the next character in the mask string as a literal. This allows you to use #, &, A, and ? as mask characters. This is treated as a literal.
&	Character placeholder. Valid values for this placeholder are ANSI characters 32-126 and 128-255.
>	Convert all following characters to uppercase.
<	Convert all following characters to lowercase.
A	Alphanumeric character placeholder where entry is required.
a	Alphanumeric character placeholder where entry is not required.
9	Digit placeholder where entry is not required.
C	Character or space placeholder where entry is not required. This is the same as the & placeholder.
?	Letter placeholder.

Table 11–1 lists examples of input masks.

**Table 11–2 Input Mask Examples**

Input Mask	Description	Example Format
###-##-####	Social Security Number	123-45-6789
##-??-##	Medium date	17-July-09
##-##-##	Short date	07-17-09
##:## ??	Medium time	03:15 PM

To configure an input format, choose **Input Format** in the Field Validation Options field, then select or enter an input format into the Input Format field that displays. Table 11–3 lists available input formats.

**Table 11–3 Input Formats**

Input Format	Description
Custom	Enter a custom format to be used. See Table 11–4.
Currency	Number with thousand separator, if appropriate, and two digits to the right of the decimal separator. Output is based on system locale settings.

**Table 11-3 (Cont.) Input Formats**

<b>Input Format</b>	<b>Description</b>
General Date	A date and/or time. For real numbers, changes to a date and time; for example, 4/3/09 05:34 PM. If there is no fractional part, changes to only a date; for example, 4/3/09. If there is no integer part, changes to time only; for example, 05:34 PM. Date display is determined by the system locale settings.
Short Date	Date using the system's short date format. Date display is determined by the system locale settings.
Medium Date	Date using the medium date format appropriate for the language version of the host application. Date display is determined by the system locale settings.
Long Date	Date according to the system's long date format.
Short Time	Time using the 24-hour format; for example, 17:45.
Medium Time	Time in 12-hour format using hours and minutes and the AM/PM designator.
Long Time	Time using the system's long time format; includes hours, minutes, seconds.
General Number	Number with no thousand separator (for example, 7500).
Fixed Number	At least one digit to the left and two digits to the right of the decimal separator (for example, 7500.16).
Standard Number	Number with thousand separator, at least one digit to the left and two digits to the right of the decimal separator (for example, 7,500.16).
Date formats	Select from one of the following date formats: yyyy-mm-dd yyyy-mm-dd hh:mm yyyy-mm-dd hh:mm:ss yyyy-mm-dd hh:mm:ss AMPM mm-dd-yyyy mm-dd-yyyy hh:mm mm-dd-yyyy hh:mm:ss mm-dd-yyyy hh:mm:ss AMPM dd-mm-yyyy dd-mm-yyyy hh:mm dd-mm-yyyy hh:mm:ss dd-mm-yyyy hh:mm:ss AM mm/dd/yyyy mm/dd/yyyy hh:mm mm/dd/yyyy hh:mm:ss mm/dd/yyyy hh:mm:ss AMPM yyyy/mm/dd yyyy/mm/dd hh:mm yyyy/mm/dd hh:mm:ss yyyy/mm/dd hh:mm:ss AMPM

In addition to predefined input forms, you can create custom character or numeric formats, as described in [Table 11-4](#).

**Table 11–4 Custom Input Formats**

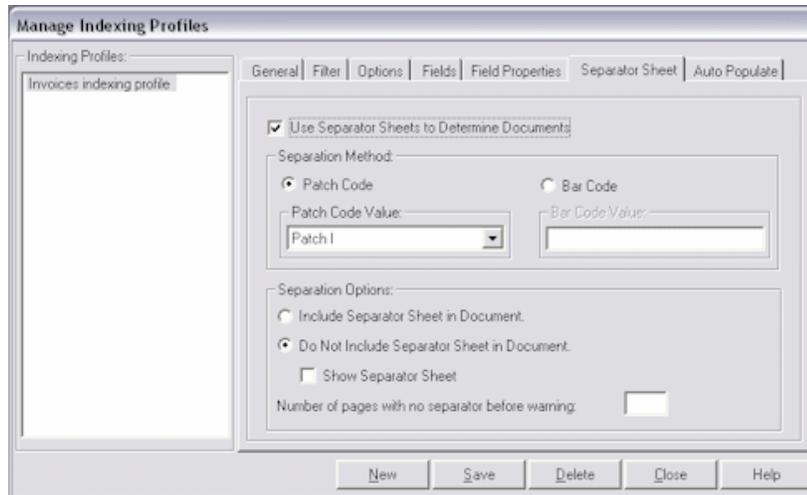
Character	Description
@	Character placeholder. Display a character or a space. If the string has a character in the position where the at symbol (@) appears in the format string, display it; otherwise, display a space in that position. Placeholders are filled from right to left unless there is an exclamation point character (!) in the format string.
&	Character placeholder. Display a character or nothing. If the string has a character in the position where the ampersand (&) appears, display it; otherwise, display nothing. Placeholders are filled from right to left unless there is an exclamation point character (!) in the format string.
<	Force lowercase. Display all characters in lowercase format. Example: A user entry of <i>HELLO</i> becomes <i>hello</i>
>	Force uppercase. Display all characters in uppercase format. Example: A user entry of <i>This is it</i> becomes <i>THIS IS IT</i>
!	Force left to right fill of placeholders. The default is to fill placeholders from right to left.
(0)	Digit placeholder. Display a digit or a zero. If the expression has a digit in the position where the 0 appears in the format string, display it; otherwise, display a zero in that position.  If the number has fewer digits than there are zeros (on either side of the decimal) in the format expression, display leading or trailing zeros. If the number has more digits to the right of the decimal separator than there are zeros to the right of the decimal separator in the format expression, round the number to as many decimal places as there are zeros. If the number has more digits to the left of the decimal separator than there are zeros to the left of the decimal separator in the format expression, display the extra digits without modification.
(#)	Digit placeholder. Display a digit or nothing. If the expression has a digit in the position where the # appears in the format string, display it; otherwise, display nothing in that position.  This symbol works like the 0 digit placeholder, except that leading and trailing zeros aren't displayed if the number has the same or fewer digits than there are # characters on either side of the decimal separator in the format expression.  Example: With an input format of ##,##0.00, a user entry of 5459.4 becomes 5,459.40.
(.)	Decimal placeholder. In some locales, a comma is used as the decimal separator. The decimal placeholder determines how many digits are displayed to the left and right of the decimal separator. If the format expression contains only number signs to the left of this symbol, numbers smaller than 1 begin with a decimal separator. To display a leading zero displayed with fractional numbers, use 0 as the first digit placeholder to the left of the decimal separator. The actual character used as a decimal placeholder in the formatted output depends on the Number Format recognized by the system.
(%)	Percentage placeholder. The expression is multiplied by 100. The percent character (%) is inserted in the position where it appears in the format string.  Example: With an input format of 0.00%, a user entry of 5 becomes 500.00%

**Table 11–4 (Cont.) Custom Input Formats**

Character	Description
(,)	Thousand separator. In some locales, a period is used as a thousand separator. The thousand separator separates thousands from hundreds within a number that has four or more places to the left of the decimal separator. Standard use of the thousand separator is specified if the format contains a thousand separator surrounded by digit placeholders (0 or #). Two adjacent thousand separators or a thousand separator immediately to the left of the decimal separator (whether or not a decimal is specified) means scale the number by dividing it by 1000, rounding as needed. For example, you can use the format string ##0,, to represent 100 million as 100. Numbers smaller than 1 million are displayed as 0. Two adjacent thousand separators in any position other than immediately to the left of the decimal separator are treated simply as specifying the use of a thousand separator. The actual character used as the thousand separator in the formatted output depends on the Number Format recognized by the system.
(:)	Time separator. In some locales, other characters may be used to represent the time separator. The time separator separates hours, minutes, and seconds when time values are formatted. The actual character used as the time separator in formatted output is determined by system settings.
(/)	Date separator. In some locales, other characters may be used to represent the date separator. The date separator separates the day, month, and year when date values are formatted. The actual character used as the date separator in formatted output is determined by system settings.
(E- E+ e- e_)	Scientific format. If the format expression contains at least one digit placeholder (0 or #) to the right of E-, E+, e-, or e+, the number is displayed in scientific format and E or e is inserted between the number and its exponent. The number of digit placeholders to the right determines the number of digits in the exponent. Use E- or e- to place a minus sign next to negative exponents. Use E+ or e+ to place a plus sign next to positive exponents.
(\)	Examples of characters that can't be displayed as literal characters are the date-formatting and time-formatting characters (a, c, d, h, m, n, p, q, s, t, w, y, / and :), the numeric-formatting characters (#, 0, %, E, e, comma, and period), and the string-formatting characters (@, &, <, >, and !).  Display the next character in the format string. To display a character that has special meaning as a literal character, precede it with a backslash (\). The backslash itself isn't displayed. Using a backslash is the same as enclosing the next character in double quotation marks. To display a backslash, use two backslashes (\).
- + \$ ()	Display a literal character. To display a character other than one of those listed, precede it with a backslash (\) or enclose it in double quotation marks ("").
("ABC")	Display the string inside the double quotation marks (""). To include a string in format from within code, you must use Chr(34) to enclose the text (34 is the character code for a quotation mark ("")).

### 11.3.6 Manage Index Profiles, Separator Sheet Tab

Use the Separator Sheet tab to set up separator sheet indexing.



To display this screen, select **Manage Index Profiles** from the Indexing menu, then select the Separator Sheet tab.

Element	Description
Use Separator Sheets to Determine Document	Select this field to enable the Separator Sheet options.
Separation Method	Select patch code or bar code options. <ul style="list-style-type: none"> <li>■ <b>Patch Code:</b> To use patch codes, select this option and choose the patch code type from the Patch Code Value field.</li> <li>■ <b>Bar Code:</b> To use bar codes, select this option. In the Bar Code Value field, enter a bar code value. This is optional but allows you to use a specific bar code value as a separator sheet detector. Otherwise, any bar code will cause a page to be considered a separator sheet.</li> </ul>

Element	Description
Separation Options	<p>Decide if you want to include the separator sheet in the document.</p> <ul style="list-style-type: none"> <li> <b>Include Separator Sheet in Document:</b> Select this option if there is data on the separator sheet and you want it stored with the document.           <p>Note: Even with the Include Separator Sheet in Document option selected, the separator sheet must still be indexed for it to be included in the document.</p> </li> <li> <b>Do Not Include Separator Sheet In Document:</b> Select this option to automatically delete the separator sheet when the batch is committed. If you want the separator sheet shown while indexing, select Show Separator Sheet. Note that this option applies only when using the Previous Document and Next Document buttons while reviewing a batch. Separator sheets will always be shown to the user when reviewing the batch page by page.           <p>Note: If the user is viewing the batch using the Thumbnail View, separator sheets will be shown within thumbnails regardless of this option's setting.</p> </li> <li> <b>Number of pages with no separator before warning:</b> Enter a number in this field if you want Index to warn you when no separator pages have been detected within that number of pages. (The warning displays when the Apply Values Up To Separator Page function is performed.) This can be useful in verifying that patch code or bar code detection was enabled when scanning or if a user forgot to insert a separator page between documents.           </li> </ul>

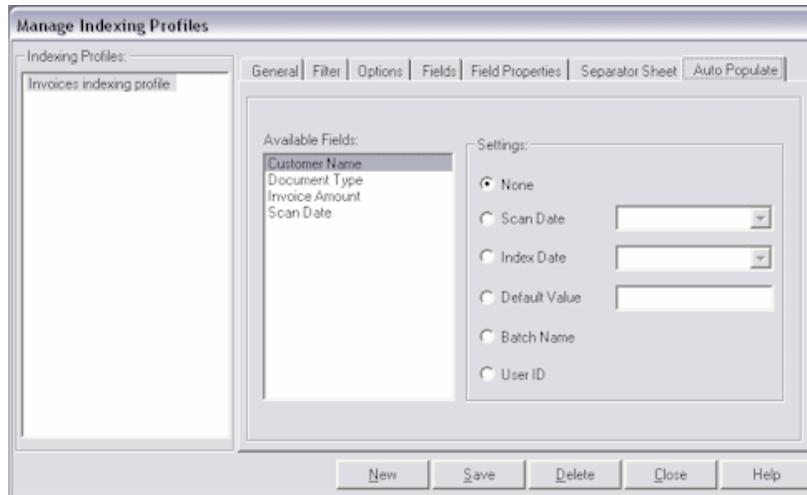
### 11.3.7 Manage Index Profiles, Auto Populate Tab

Use the Auto Populate tab to set up automatically indexed fields. You can configure Index to automatically fill (populate) selected index fields with certain values. For example, you might want to automatically populate a date field with the batch's scan date instead of having users type it in. Or, you might want to provide a default value for a field that the user could change if needed.

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**Note:** Fields do not have to be selected for display on the Fields tab in order to be auto-populated. See "[Manage Index Profiles, Fields Tab](#)" on page 11-51.

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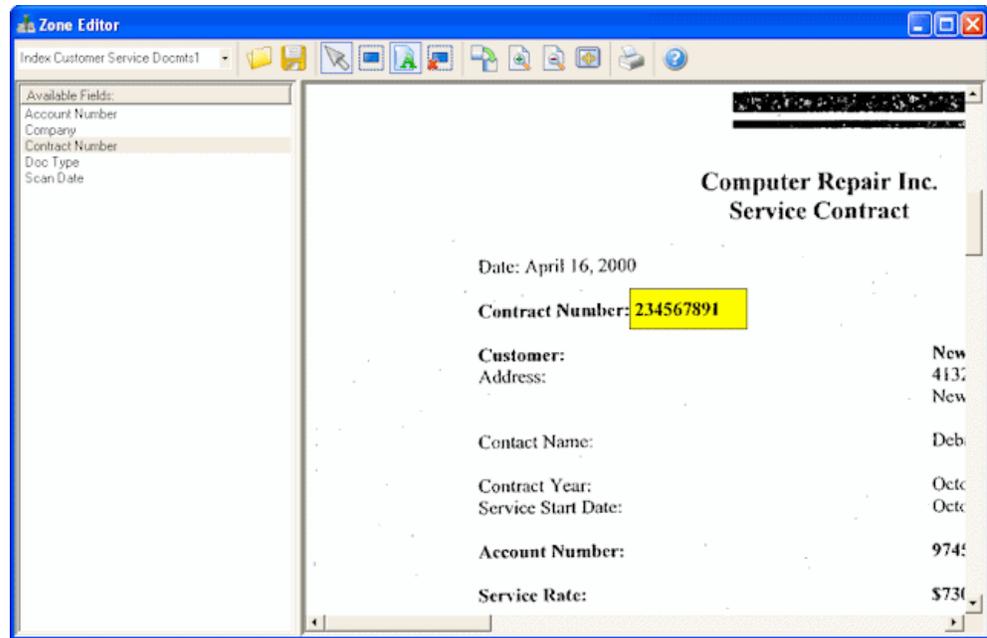


To display this screen, select **Manage Index Profiles** from the Indexing menu, then select the Auto Populate tab.

Element	Description
Available Fields	Select the index field you want to auto-populate. The Available Fields field lists all fields in the file cabinet, not just those selected for display to the user. Index detects each field's data type, and displays available settings in the Settings area based on its type.
Settings	Select a system value. (The options available depend on the data type of the field you selected.) You can choose: <ul style="list-style-type: none"> <li>■ <b>None</b> (default): Select this option to turn the auto-populate option off for the selected field.</li> <li>■ <b>Scan Date</b>: Automatically enters the scan date into the selected index field, using the date format you select from the field to its right.</li> <li>■ <b>Index Date</b>: Automatically enters the index date into the selected index field, using the date format you select from the field to its right.</li> <li>■ <b>Default Value</b>: Automatically enters the value you specify into the selected index field.</li> <li>■ <b>Batch Name</b>: Automatically enters the batch name into the selected index field.</li> <li>■ <b>User ID</b>: Automatically enters the indexing user's User ID into the selected index field. This can be helpful in determining which user indexed a document.</li> </ul>

### 11.3.8 Zone Editor

Use the Zone Editor to set up zones and OCR for index fields.



To display the Zone Editor, click the **Zone Editor** button on the toolbar of the Oracle Document Capture screen.

Element	Description
Index Profile	Select the index profile to which to apply zones.
Available Fields	Select an index field from those set for user entry in the index profiles (see " <a href="#">Manage Index Profiles, Fields Tab</a> " on page 11-51). You can set one zone for each index field. The selected field's zone is displayed in yellow and other zones are displayed in turquoise.)
Open Image File	Displays a standard file dialog box from which to open a TIFF, BMP, or JPG format image to use as a template for defining zones.
Save	Save the zones and image with the profile, allowing you to make changes to the zones later using the same image.
Pointer	Select a zone in order to move or resize it, delete it, or activate OCR for it.
Create Zone	Click this button to create a zone, then click and drag to define a zone on the image.
OCR Field	Click this button to turn on OCR for the selected zone.
Delete Zone	Click this button to delete the selected zone.
Rotate Right	Click this button to rotate the image.
Zoom In, Zoom Out, Fit to Window	Change the image page view by zooming in or out.
Print	Click this button to print the image.



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## Servers User Interface

This chapter contains information about the user interface for Oracle Document Capture servers. The following main topics are described in this chapter:

- ["Commit Server Screens"](#) on page 12-1
- ["Recognition Server Screens"](#) on page 12-11
- ["Import Server Screens"](#) on page 12-30
- ["Guidelines For Running Servers as Services"](#) on page 12-56

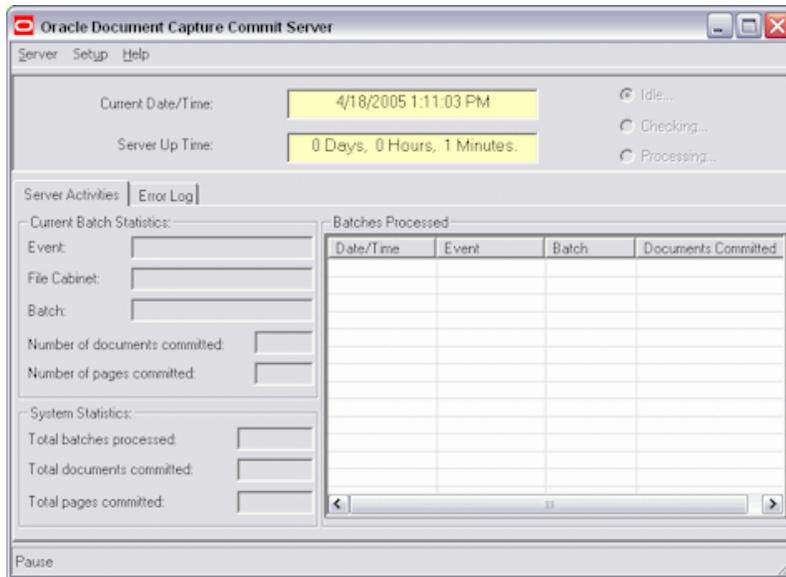
### 12.1 Commit Server Screens

Commit Server includes the following screens and dialog boxes:

- ["Oracle Document Capture Commit Server Screen"](#) on page 12-1
- ["Scheduler"](#) on page 12-4
- ["Schedule New Event"](#) on page 12-4
- ["Commit Server Settings"](#) on page 12-5
- ["Batch Jobs, General Tab"](#) on page 12-9
- ["Batch Jobs, Batch Criteria Tab"](#) on page 12-10
- ["Batch Jobs, Processing Order Tab"](#) on page 12-11

#### 12.1.1 Oracle Document Capture Commit Server Screen

The Commit Server screen is displayed when you start Commit Server. Use this screen to create batch jobs, schedule when jobs are run, and view job processing statistics and errors.



To display this screen, choose **Oracle Document Capture**, then **Commit Server** from the Start menu.

---

**Note:** If there are jobs scheduled, Commit Server starts in an active state. However, Commit Server does not begin processing jobs for one minute, which gives you a chance to deactivate the server if you do not want it to process any scheduled jobs.

---

During processing, a **Cancel** button displays that allows you to stop processing. When canceled, the server completes processing the current batch and then pauses. After activating the server, you will need a scheduled event to resume processing the batch job on which you paused.

The Commit Server screen contains the following menus:

- ["Commit Server Menus"](#) on page 12-2
- ["Commit Server Status"](#) on page 12-3
- ["Server Activities Tab"](#) on page 12-3
- ["Error Log Tab"](#) on page 12-3

### 12.1.1.1 Commit Server Menus

The Commit Server screen contains the following menus:

Menu	Options
Server	<p><b>Activate:</b> Starts the server, if paused. Selecting Activate changes the command to Pause. Choose Pause to deactivate the server to create and schedule batch jobs or change settings.</p> <p><b>Schedule:</b> Create batch job processing events. See <a href="#">"Scheduler"</a> on page 12-4.</p>

Menu	Options
Setup	<p><b>General Settings:</b> View or change Commit Server settings. See "<a href="#">Commit Server Settings</a>" on page 12-5.</p> <p><b>Batch Jobs:</b> Add or edit batch jobs that identify batches to be processed by Commit Server. See "<a href="#">Batch Jobs, General Tab</a>" on page 12-9.</p> <p><b>Batch Setup:</b> Specify where Capture batches are stored and committed, and configure and initialize the Capture database. See "<a href="#">Capture Batch Setup Screen</a>" on page 13-3.</p>

### 12.1.1.2 Commit Server Status

The Commit Server displays status in the following fields:

Element	Description
Current Date/Time	Displays the date and time using current system settings.
Server Up Time	Displays the current session length in days, hours, and minutes.
Status	<p>Displays the server's status, where:</p> <ul style="list-style-type: none"> <li>■ Idle indicates that it is not time for any scheduled events.</li> <li>■ Checking indicates that the server has detected a scheduled event (batch job to process).</li> <li>■ Processing indicates that the server is committing batches.</li> </ul>

### 12.1.1.3 Server Activities Tab

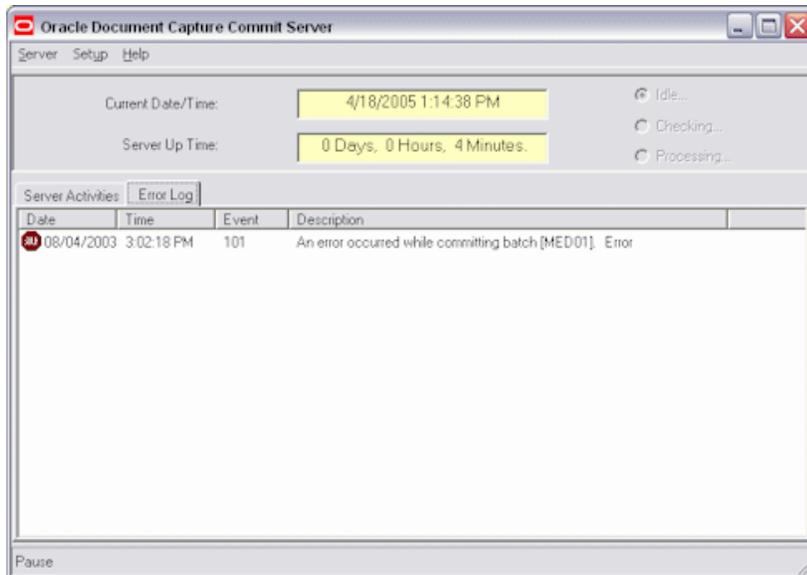
The Server Activities tab displays information about jobs that are currently processing or have been processed since the server began running. This information is deleted when a session ends (when Commit Server is shut down). For each file cabinet being processed, Commit Server displays the number of batches processed, documents created from those batches, and images in those documents. Commit Server updates this list after each batch in a job finishes processing.

Processing details are displayed in the Current Batch Statistics and System Statistics areas. Information about batches processed is displayed in the Batches Processed table.

### 12.1.1.4 Error Log Tab

The Error Log tab displays information about any errors that occurred during processing. Information in this screen is periodically removed from the display to conserve memory. If an error occurred, the date and time at which it occurred and a description of the error are shown.

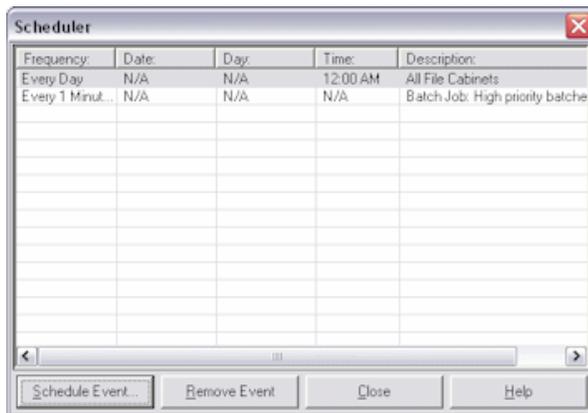
A symbol is displayed next to messages. Informational messages display an i symbol, caution messages display an exclamation point symbol and error messages display a stop sign symbol.



You select error-related settings in the Commit Server Settings dialog box, as described in "Commit Server Settings" on page 12-5.

### 12.1.2 Scheduler

Use the Scheduler screen to schedule or remove batch job processing events.



To display this screen, pause the server if needed (choose **Pause** from the Server menu) and select **Schedule** from the Server menu of Commit Server.

Element	Description
Events	Lists scheduled events, including their frequency, date, day, time and description.
Schedule Event	Click to schedule a new event.
Remove Event	Click to delete a selected event

### 12.1.3 Schedule New Event

Use the Schedule New Event screen to create an event.



To display this screen, pause the server if needed (choose **Pause** from the Server menu), select **Schedule** from the Server menu of Commit Server and click **Schedule Event**.

Element	Description
Event	Select the batch job to be processed. This field lists all file cabinets, each file cabinet separately and batch jobs that have been created in Commit Server. It also contains an option called Delete Old Log Files, which you use to remove old log files that are no longer needed, and an option called Shut Down, which you can use to automatically shut down Commit Server at a designated time.
Frequency	Select how often you want the job processed. You can schedule the job to run once, every 1, 5, 15 or 30 seconds or minutes, every hour, every day, or every week.
Time, Day, Date, Month and Year	If you selected <b>Once</b> in the Frequency field, specify when in these fields. Time fields. If you select <b>Every Week</b> , specify a day and time.

## 12.1.4 Commit Server Settings

Use the following tabs on this screen to view or change Commit Server settings.

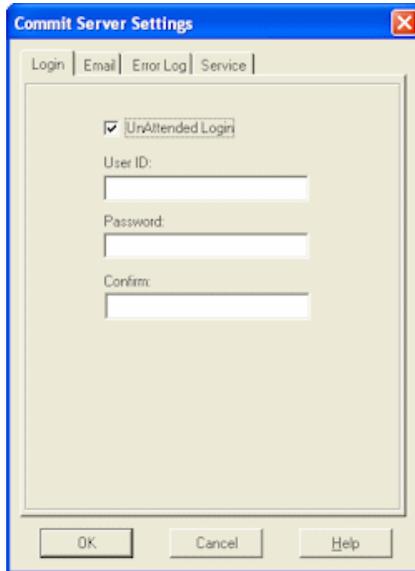
To display this screen, choose **General Settings** from the Setup menu of Commit Server (if needed, choose **Pause** from the Server menu first).

Commit Server Settings tabs include:

- ["Commit Server Settings, Login Tab"](#) on page 12-5
- ["Commit Server Settings, Email Tab"](#) on page 12-6
- ["Commit Server Settings, Error Log Tab"](#) on page 12-7
- ["Commit Server Settings, Service Tab"](#) on page 12-9

### 12.1.4.1 Commit Server Settings, Login Tab

Use the Login tab to enter unattended login information so that login is not required when Commit Server is started. For example, you might include Commit Server in a Windows reboot configuration; if the server goes down, it will reboot according to this configuration, and Commit Server will start up without requiring login information.



The Commit Server Settings Login tab contains the following fields:

Element	Description
UnAttended Login	Select this field, then enter your user ID in the User ID field and enter your password in the Password and Confirm fields.

---

**Note:** If you selected Windows domain security as your security model, use the format `\\domain\userID` in the User ID field (for example, `\\domain2\jdoe`) to specify the domain along with the user name. For unattended login, the user must be added as an individual Capture user. See "[About Users in Capture](#)" on page 2-2.

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#### 12.1.4.2 Commit Server Settings, Email Tab

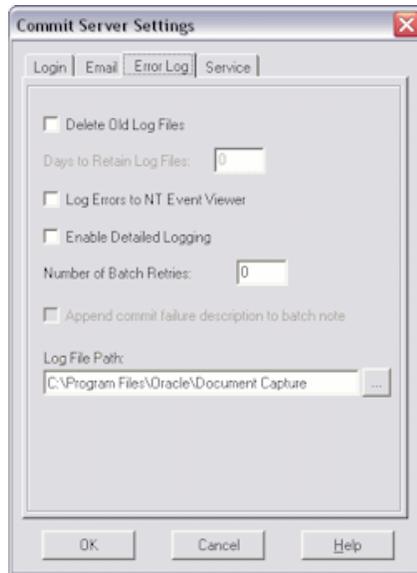
Use these options to specify who should receive an email if Commit Server encounters an error while performing commit processing. The subject of the error email is *Notification of Commit Server Error*; it identifies the batch being committed when the error occurred and describes the error.

The Commit Server Settings Email tab contains the following fields:

Element	Description
Send On Error	Select this field if you want an email sent.
SMTP Server Name	Specify the name of the server you are using to send emails.
Authorization Mode	Select a mode for which to authorize email sending. You can choose: None, AUTH LOGIN or CRAM-MD5.
User ID and Password	Enter a username and password for email authorization. If you selected None in the Authorization Mode field, you do not need to enter a user ID and password.
From Email Address	Enter the email address from which the error emails will be sent.
Alias From Name	Enter an alternate name from whom the emails will be sent.
To, Cc	Enter the email addresses of people to send the email to. Separate multiple email addresses in either field with a semi-colon (;).
Test Email	Click this button to send a test email. Commit Server verifies the SMTP settings you specified, and sends a test email to all users specified in the To and Cc fields.

#### 12.1.4.3 Commit Server Settings, Error Log Tab

Use the options to specify how you want error messages saved. These errors are also displayed on the Error Log tab.



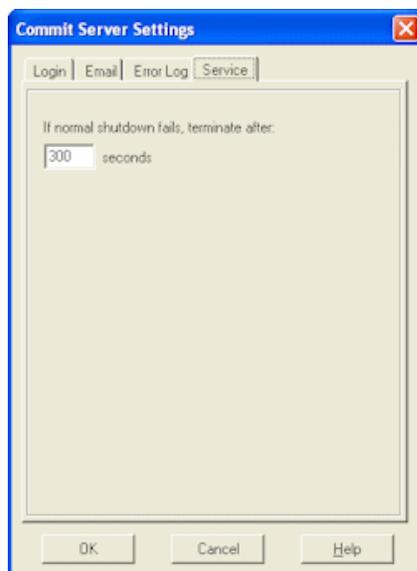
The Commit Server Settings Error Log tab contains the following fields:

Element	Description
Delete Old Log Files	Select this field to delete log files that exceed the number of days specified in the Days to Retain Log Files field. For example, type 14 to retain log files for two weeks. Note that in addition to selecting this field, you must also schedule this event in order to delete old log files; see " <a href="#">Scheduler</a> " on page 12-15.
Log Errors to NT Event Viewer	Select this field to write logs to the Windows Event Viewer. (Refer to your Windows documentation for more information.)
Enable Detailed Logging	Select this field to activate logging in addition to standard error logging. When checked, the Commit Server also logs the following: <ul style="list-style-type: none"> <li>■ Start of a batch job event</li> <li>■ Start of a batch processing</li> <li>■ Commit of a document, including document index values</li> <li>■ End of a batch commit</li> <li>■ Average processing time of a batch</li> </ul>
Number of Batch Retries	Enter the number of times you want Commit Server to retry committing a batch. For example, if you enter 1, Commit Server will attempt to commit the batch one additional time if it fails on the first try. When set to 0 (the default), Commit Server infinitely retries committing. Note that if the last retry fails, Commit Server generates a critical error and sends an email, if specified.  Note that restarting Commit Server restarts the retry count.

Element	Description
Append commit failure description to batch note	Select this field to add a description of the commit failure to a batch note on the last retry. The note appends rather than overwrites any current batch note. This checkbox is available only when the Number of Batch Retries field contains a number other than 0.
Log File Path	Specify a folder in which to store log files. The name of the log file will be CSmm-dd-yyyy.LOG, where mm-dd-yyyy reflects the date on which the log was last updated.

#### 12.1.4.4 Commit Server Settings, Service Tab

If running Commit Server as a service, use this tab to specify how long to wait for the service to shut down normally. For more information, see "[Guidelines For Running Servers as Services](#)" on page 12-56.

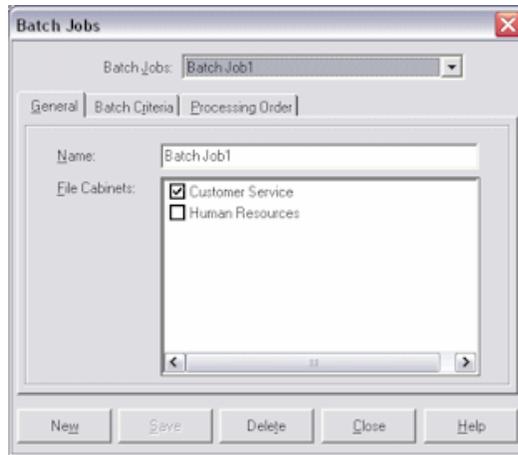


The Commit Server Settings Service tab contains the following fields:

Element	Description
If normal shutdown fails, terminate after __ seconds	Specify the number of seconds (30-900) to wait for the service to shut down normally. (The default is 300 seconds.) If the server application does not shut down in this time, the server will be terminated. This could happen in instances where a large batch is still being processed or the application is not responding.

#### 12.1.5 Batch Jobs, General Tab

Use this tab to apply general settings to the selected Commit Server batch job.



To display this tab, choose **Batch Jobs** from the Setup menu (if needed, choose **Pause** from the Server menu to pause the server).

Element	Description
Name	Enter a name for the batch job. To change it, type a new name of up to 50 alphanumeric characters; you can include spaces.
File Cabinets	Select each file cabinet you want included in the job. You can use options on the Batch Criteria tab to specify particular batches from selected file cabinets you want processed.

### 12.1.6 Batch Jobs, Batch Criteria Tab

Use this tab to specify the batches in the selected file cabinet(s) you want processed.



To display this tab, choose **Batch Jobs** from the Setup menu (if needed, choose **Pause** from the Server menu to pause the server) and click the **Batch Criteria** tab.

Element	Description
File Cabinet	Lists the file cabinet(s) you selected for the job on the General tab. Select the file cabinet for which you want to specify batch criteria. You can specify different batch criteria for each file cabinet if multiple ones are selected.
Batch Prefix	By default, Commit Server processes all batches in the selected file cabinet. To process certain batches only based on their prefix, click the Process specific batches radio button and enter the prefix(es) in the Batch prefixes field, separating them with a semi-colon.
Batch Status	To process certain batches only based on their status, click the Process specific batches field and select statuses from the Batch Statuses field.

### 12.1.7 Batch Jobs, Processing Order Tab

Use this tab to specify the order in which you want selected batches committed. For example, you might want all batches committed by priority, in descending order from highest to lowest.



To display this tab, choose **Batch Jobs** from the Setup menu (if needed, choose **Pause** from the Server menu to pause the server) and click the **Processing Order** tab.

Element	Description
Sort batches prior to committing	Select this field to sort batches according to the criteria specified below.
Batches sort criteria	Select the order in which you want batches committed (by Batch Name, Scan Date or Priority) in the Order by field. Then select Ascending or Descending to indicate the order in which you want them sorted. These fields are disabled if the Sort batches prior to committing field is deselected.

## 12.2 Recognition Server Screens

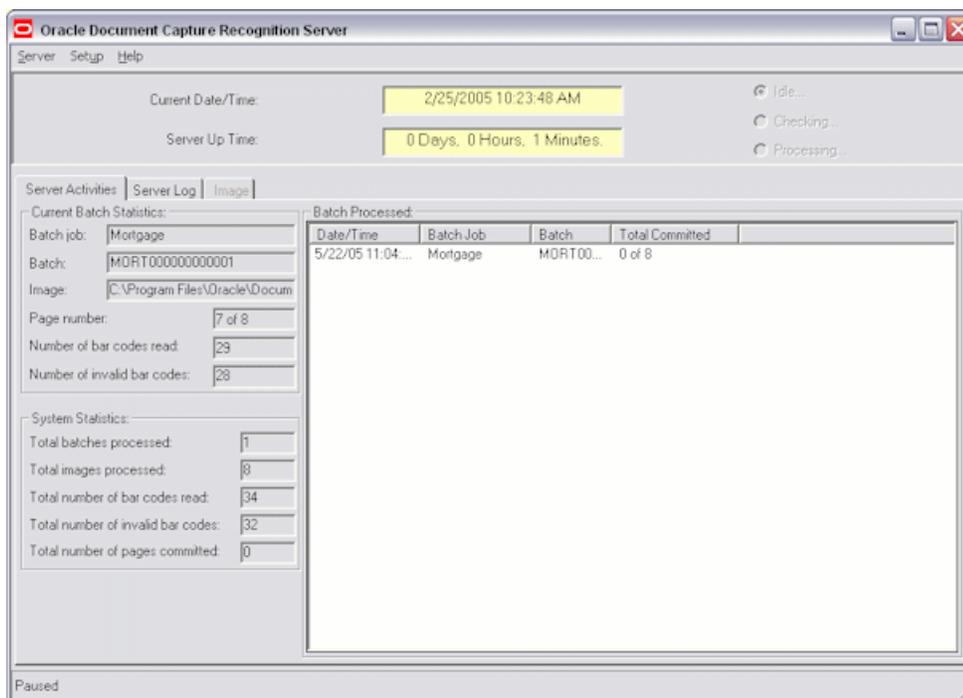
The following screens are used in Recognition Server.

- ["Oracle Document Capture Recognition Server Screen"](#) on page 12-12

- "Scheduler" on page 12-15
- "Schedule New Event" on page 12-16
- "License Manager Setup Screen" on page 12-16
- "Recognition Server General Settings" on page 12-17
- "Batch Job Settings, General Tab" on page 12-20
- "Batch Job Settings, Processing Tab" on page 12-22
- "Batch Job Settings, Bar Code Recognition Tab" on page 12-24
- "Batch Job Settings, Bar Codes Tab" on page 12-26
- "Batch Job Settings, Fields Tab" on page 12-28
- "Batch Job Settings, Database Lookup Tab" on page 12-29

### 12.2.1 Oracle Document Capture Recognition Server Screen

The Recognition Server screen is displayed when you start Recognition Server. Use this screen to create batch jobs, schedule when jobs are run and view job processing statistics and errors.



To display this screen, choose **Oracle Document Capture**, then **Recognition Server** from the Start menu.

---

**Note:** If there are jobs scheduled, Recognition Server starts in an active state. However, Recognition Server does not begin processing jobs for one minute, which gives you a chance to deactivate the server if you do not want it to process any scheduled jobs.

During processing, a Cancel button displays that allows you to stop processing. When canceled, the server completes processing the current batch and then pauses. After activating the server, you will need a scheduled event to resume processing the batch job on which you paused.

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The Recognition Server screen contains the following items:

- ["Recognition Server Menus"](#) on page 12-13
- ["Recognition Server Status"](#) on page 12-13
- ["Server Activities Tab"](#) on page 12-14
- ["Server Log Tab"](#) on page 12-14
- ["Image Tab"](#) on page 12-15

### 12.2.1.1 Recognition Server Menus

Recognition Server contains these menus:

Element	Description
Server Menu	<ul style="list-style-type: none"> <li>■ <b>Activate:</b> Starts the server, if paused. Selecting Activate changes the command to Pause. Choose Pause to deactivate the server to create and schedule batch jobs or change settings.</li> <li>■ <b>Schedule:</b> Create batch job processing events. See <a href="#">"Scheduler"</a> on page 12-15.</li> </ul>
Setup Menu	<ul style="list-style-type: none"> <li>■ <b>General Settings:</b> View or change Recognition Server settings. See <a href="#">"Recognition Server General Settings"</a> on page 12-17.</li> <li>■ <b>Batch Jobs:</b> Add or edit batch jobs that identify batches to be processed by Recognition Server. See <a href="#">"Batch Job Settings, General Tab"</a> on page 12-20.</li> <li>■ <b>Batch Setup:</b> Specify where Capture batches are stored and committed, and configure and initialize the Capture database. See <a href="#">"Capture Batch Setup Screen"</a> on page 13-3.</li> <li>■ <b>License Manager:</b> Generate, activate, or remove a Recognition Server license. See <a href="#">"License Manager Setup Screen"</a> on page 12-16.</li> <li>■ <b>Macro Manager:</b> Customize functionality through Visual Basic for Applications (VBA) compatible macros.</li> </ul>

### 12.2.1.2 Recognition Server Status

Recognition Server displays status in the following fields:

Element	Description
Current Date/Time	Displays the date and time using current system settings.
Server Up Time	<p>Displays the current session length in days, hours, and minutes.</p> <ul style="list-style-type: none"> <li>■ Idle indicates that it is not time for any scheduled events.</li> <li>■ Checking indicates that the server has detected a scheduled event (batch job to process).</li> <li>■ Processing indicates that it is performing bar code recognition, indexing documents, and committing the batches.</li> </ul>

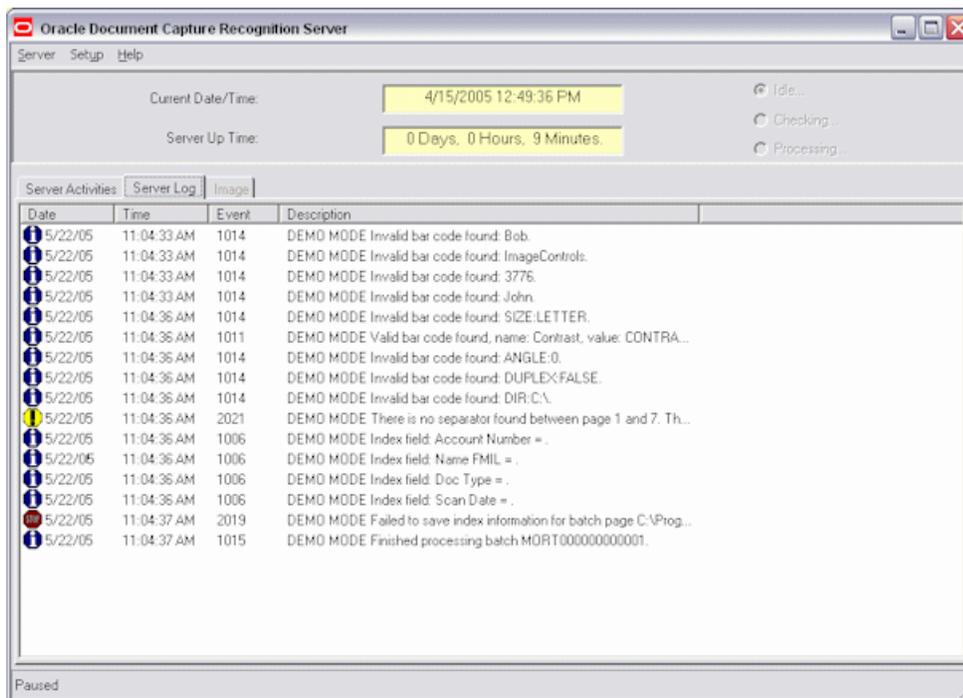
### 12.2.1.3 Server Activities Tab

The Server Activities tab displays information about jobs that are currently processing or have been processed since the server began running. This information is deleted when a session ends (when Recognition Server is shut down). For each file cabinet being processed, Recognition Server displays the number of batches processed, documents created from those batches, and images in those documents. Recognition Server updates this list after each batch in a job finishes processing.

Processing details are displayed in the Current Batch Statistics and System Statistics areas. Information about batches processed is displayed in the Batches Processed table.

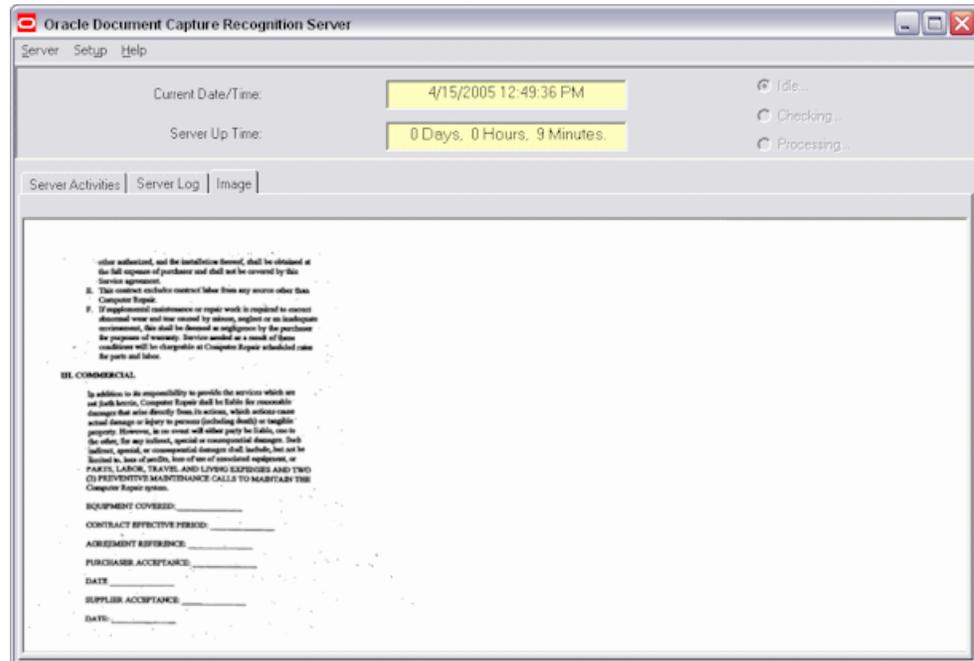
### 12.2.1.4 Server Log Tab

This tab displays processing messages generated since the server began running. These messages are also written to a log file.



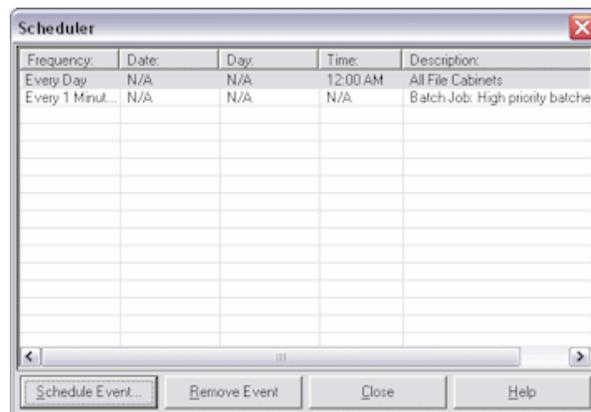
### 12.2.1.5 Image Tab

As each image is processed by Recognition Server, this tab displays the image and highlights any bar codes found.



## 12.2.2 Scheduler

Use the Scheduler dialog box to schedule or remove batch job processing events.



To display this screen, pause the server if needed (choose **Pause** from the Server menu) and select **Schedule** from the Server menu of Recognition Server.

Element	Description
Events	Lists scheduled events, including their frequency, date, day, time and description.
Schedule Event	Click to schedule a new event.
Remove Event	Click to delete a selected event.

### 12.2.3 Schedule New Event

Use the Schedule New Event dialog box to create an event.



To display this screen, pause the server if needed (choose **Pause** from the Server menu), select **Schedule** from the Server menu of Recognition Server and click **Schedule Event**.

Element	Description
Event	Select the batch job to be processed. This field lists all file cabinets, each file cabinet separately and batch jobs that have been created in Recognition Server. It also contains an option called Delete Old Log Files, which you use to remove old log files that are no longer needed, and an option called Shut Down, which you can use to shut down Recognition Server unattended.
Frequency	Select how often you want the job processed. You can schedule the job to run once, every 1, 5, 15 or 30 seconds or minutes, every hour, every day, or every week.
Time, Day, Date, Month and Year	If you selected <b>Once</b> in the Frequency field, specify when in these fields. Time fields. If you select <b>Every Week</b> , specify a day and time.

### 12.2.4 License Manager Setup Screen

Use this screen to generate a request, activate, or remove a Recognition Server license.

**Note:** You may use these Recognition Server component for an evaluation period of up to 30 days under the terms of a valid license agreement, after which you must activate its license.



To display this screen, choose **License Manager Setup** from the Setup menu of Recognition Server.

Element	Description
Recognition Server	This display only field is selected if a license is active and deselected if no license is found.
Request	Initiate a request for a Recognition Server license for the workstation.
Activate	Apply the new Recognition Server license after receiving a response key from Oracle.
Remove	Remove the Recognition Server license from the current workstation. You might remove the license, for example, in order to use it on another workstation.

## 12.2.5 Recognition Server General Settings

Use the following tabs on this dialog box to view or change Recognition Server settings.

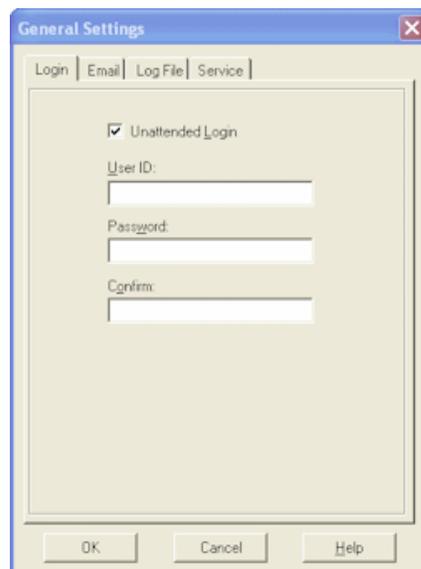
To display this dialog box, choose **General Settings** from the Setup menu of Recognition Server (if needed, choose **Pause** from the Server menu first).

Recognition Server Settings tabs include:

- ["Recognition Server Settings, Login Tab"](#) on page 12-17
- ["Recognition Server Settings, Email Tab"](#) on page 12-18
- ["Recognition Server Settings, Log File Tab"](#) on page 12-19
- ["Recognition Server Settings, Service Tab"](#) on page 12-19

### 12.2.5.1 Recognition Server Settings, Login Tab

Use the Login tab to enter a user name and password so logging in is not required when Recognition Server is started. For example, you might include Recognition Server in a Windows reboot configuration; if the server goes down, it will reboot according to this configuration, and Recognition Server will start up without requiring login information.



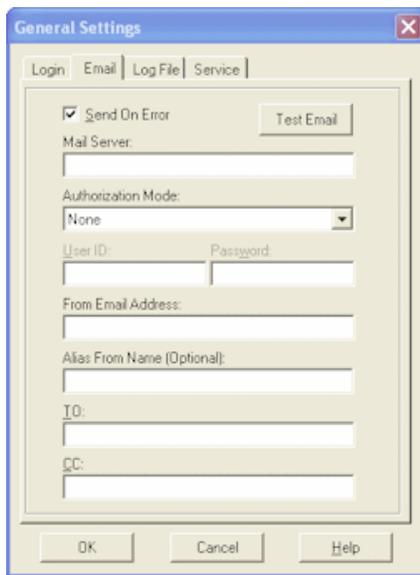
The Login tab contains the following elements:

Element	Description
UnAttended Login	Select this field, then enter your user ID in the User ID field and enter your password in the Password and Confirm fields.

**Note:** If you selected Windows domain security as your security model, use the format \\domain\userID in the User ID field (for example, \\domain2\jdoe) to specify the domain along with the user name. For unattended login, the user must be added as an individual Capture user. See "[About Users in Capture](#)" on page 2-2.

### 12.2.5.2 Recognition Server Settings, Email Tab

Use these options to specify who should receive an email if Recognition Server encounters an error during processing. The subject of the error email is *Notification of Recognition Server Error*; it identifies the batch being processed when the error occurred and describes the error.



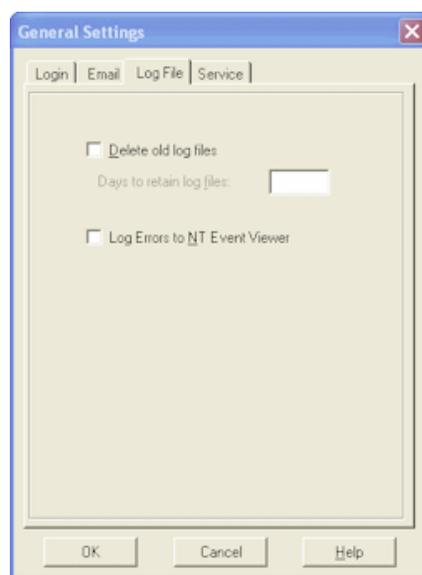
The Email tab contains the following elements:

Element	Description
Send On Error	Select this field if you want an email sent.
SMTP Server Name	Specify the name of the server you are using to send emails.
Authorization Mode	Select a mode for which to authorize email sending. You can choose: None, AUTH LOGIN or CRAM-MD5.
User ID and Password	Enter a username and password for email authorization. If you selected None in the Authorization Mode field, you do not need to enter a user ID and password.

Element	Description
From Email Address	Enter the email address from which the error emails will be sent.
Alias From Name	Enter an alternate name from whom the emails will be sent.
To, Cc	Enter the email addresses of people to send the email to. Separate multiple email addresses in either field with a semi-colon (;).
Test Email	Click this button to send a test email. Recognition Server verifies the SMTP settings you specified, and sends a test email to all users specified in the To and Cc fields.

### 12.2.5.3 Recognition Server Settings, Log File Tab

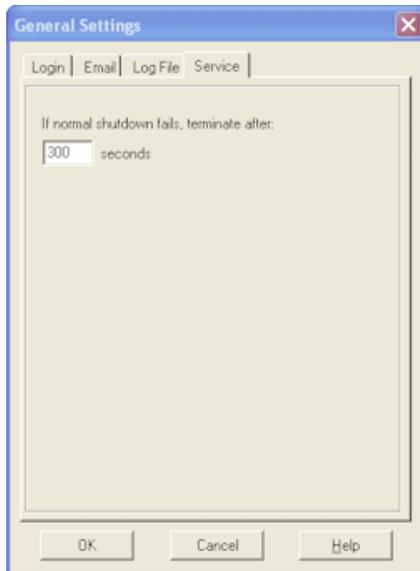
Use these options to specify how you want log messages saved. These log messages are also displayed on the Server Log tab.



Element	Description
Allow Scheduled Deletion of Log Files	Select this field to delete log files that exceed the number of days specified in the Days to Retain Log Files field. For example, type 14 to retain log files for two weeks. Note that in addition to selecting this field, you must also schedule this event in order to delete old log files; see " <a href="#">Scheduler</a> " on page 12-15.
Log Errors to NT Event Viewer	Select this field to write logs to the Windows Event Viewer. (Refer to your Windows documentation for more information.)

### 12.2.5.4 Recognition Server Settings, Service Tab

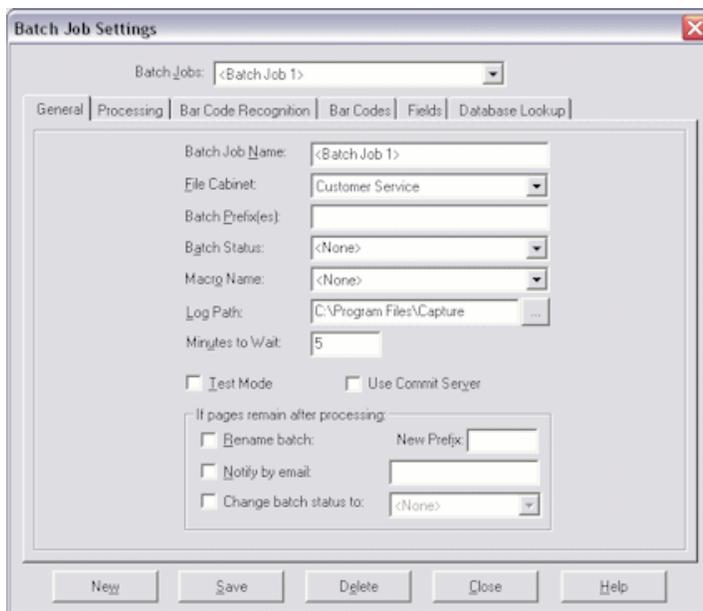
If running Recognition Server as a service, use this tab to specify how long to wait for the service to shut down normally. For more information, see "[Guidelines For Running Servers as Services](#)" on page 12-56.



Element	Description
If normal shutdown fails, terminate after __ seconds	Specify the number of seconds (30-900) to wait for the service to shut down normally. (The default is 300 seconds.) If the server application does not shut down in this time, the server will be terminated. This could happen in instances where a large batch is still being processed or the application is not responding.

## 12.2.6 Batch Job Settings, General Tab

Use this tab to apply general settings to the selected Recognition Server batch job.

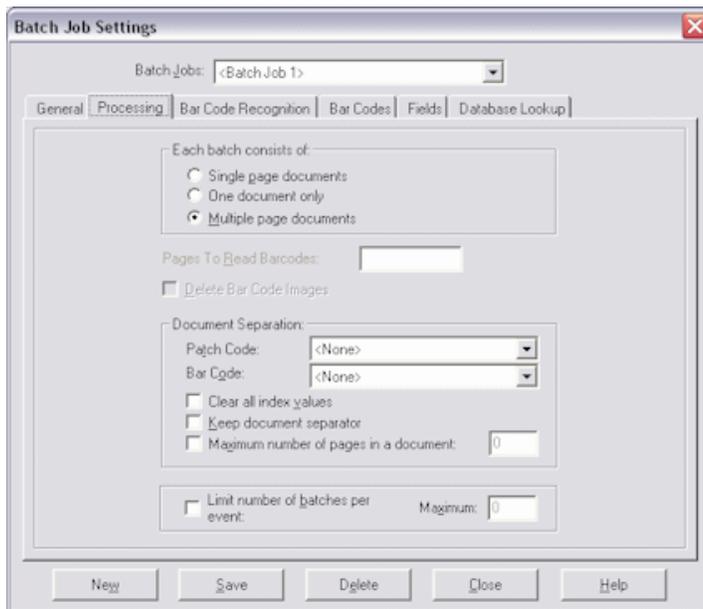


Element	Description
Batch Job Name	Enter a name for the selected batch job. You can enter up to 50 alphanumeric characters, including spaces.
File Cabinet	Select the file cabinet in which scanned batches are assigned. File cabinets and their fields are defined within Capture administration.
Batch Prefix(es)	Limits the batches Recognition Server will process to those with the prefix(es) you specify in this field. For example, type <i>Mort</i> in this field to process batches that begin with <i>Mort</i> only. A batch prefix may contain up to eight characters. Separate multiple prefixes with a semi-colon or comma. If you leave this field blank, the batch job will process all batches in the selected file cabinet.
Batch Status	Limits the batches Recognition Server will process to those with the batch status(es) you select in this field. For example, if you select a status of <i>Rush</i> , only batches with a <i>Rush</i> status will be processed. If <i>&lt;None&gt;</i> is selected, Recognition Server processes batches with any status. (This field lists available batch statuses, which are defined within Capture administration.)
Macro Name	Select a macro (VBA-compliant source code file) to apply to the processing. For example, you might use a macro to automatically increment a bar code value on each image; a macro could read the first bar code, keep track and increment by one on each image.
Log Path	Specify where to store the log files Recognition Server creates each day. Log files are named using their date, in the format <i>RSMM-DD-YYYY.log</i> (as in <i>RS05-31-2008.log</i> ).
Minutes to Wait	Specify how long you want Recognition Server to wait, after detecting a newly scanned batch, before starting scheduled processing. As soon as batches are scanned, they are available to Recognition Server, and if scheduled for every minute, processing might begin before the scanning user has had a chance to review the batch and make changes. This field temporarily withholds the batch from Recognition Server until the specified number of minutes has elapsed.
Test Mode	Select this field to process without archiving images into your content management system. This option allows you to test Recognition Server settings and macros without having to re-scan batches. You can examine the log file to observe server activity.
Use Commit Server	Select this field to process the batches using Commit Server. If checked, Recognition Server marks each batch as ready to be committed by Commit Server after bar code recognition, instead of actually committing it.
Rename batch, New Prefix (if pages remain after processing)	Select the <b>Rename batch</b> field if you want Recognition Server to rename a batch if images remain after processing, using the prefix specified in the <b>New Prefix</b> field. For example, an image might remain if Recognition Server is unable to read its bar code. Entering a prefix such as <i>ERR</i> allows you to easily locate these images for manual indexing.

Element	Description
Notify by email (if pages remain after processing)	Select this field if you want Recognition Server to send an email if images remain after processing a batch (see above option). In the event that images remain, you will most likely want to notify an Index user rather than the administrator. In the adjacent text field, enter the email address of the person to notify; separate multiple email addresses with a semi-colon (;). The email is then sent to this email address instead of the address identified in the General Settings dialog box.
Change batch status to (if pages remain after processing)	Use this option to automatically change a batch status if pages remain after processing. For example, you might define a batch status called <i>Error</i> in Capture Administration and assign it to this field to mark batches containing errors.

### 12.2.7 Batch Job Settings, Processing Tab

Use this tab to specify how Recognition Server processes the batch job's images. For example, specify how images in each batch were divided into documents and scanned, and how documents were separated (in batches with multiple documents).

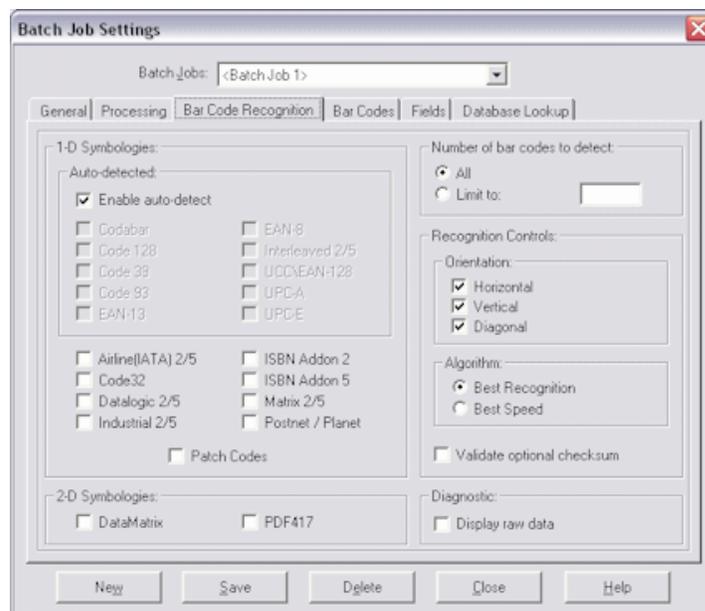


Element	Description
Each batch consists of	<p>From these options, specify how images were divided into documents in the job's batches. The method you select in this field affects which options are available elsewhere on the tab. Methods include:</p> <ul style="list-style-type: none"> <li data-bbox="776 359 1450 520">■ <b>Single page documents:</b> Recognition Server indexes and files a single page document from each image in the batch. Each image must contain a bar code. This method is very safe, since any page that does not contain a bar code (or bar code recognition failed to read the bar code) will be left in the batch for manually indexing using Index.</li> <li data-bbox="776 531 1450 741">■ <b>One document only:</b> Bar code information is read from one or more images in the batch and used to index and file the entire batch as a single document. You must also specify which page(s) on which to read the bar codes (see below) and if you want the bar code images deleted (see below). For example, court cases with very large documents might use this method, where all images for a case number are filed as a single document.</li> <li data-bbox="776 751 1450 1178">■ <b>Multiple page documents:</b> A batch contains multiple (often related) documents, and a bar code displays on the first page of each document. This method requires that Recognition Server knows how to distinguish the documents within a batch. Using Document Separation options (see below), you may specify a patch code and/or bar code separator. In addition, a macro can also determine document separation through custom logic. This method might be used to index and archive large folders of insurance documents; the first image might contain a bar code with the policy number, followed by a document separator, and then by related policy documents such as claims and correspondence. In this scenario, all images within the batch would belong to the same policy number, which would reduce the possibility of incorrectly filed images.</li> </ul>
Pages to Read Bar Codes	<p>Specify the page number containing the document's bar code. For example, type 1 to indicate that bar codes are placed on the first page. Type 0 if you want Recognition Server to perform bar code recognition on all pages. Note that this will increase processing time. (This option is available when the One document only option is selected.)</p>
Delete Bar Code Images	<p>Select this field to remove images containing bar codes after they are read. (This option is available when the One document only field is selected.)</p>
Patch Code	<p>Use this field to indicate that documents are separated using patch codes by selecting the patch code type used. Note that you must also enable patch code detection by selecting the Patch Code field on the Bar Code Recognition tab (see "<a href="#">Batch Job Settings, Bar Code Recognition Tab</a>" on page 12-24). (This option is available when the Multiple page documents option is selected.)</p> <p><b>Note:</b> You can specify a patch code and a bar code separator, as an added safeguard against a separator being missed.</p>
Bar Code	<p>Use this field to indicate that documents are separated using a bar code by selecting the appropriate bar code definition from this field. You create bar code definitions on the Bar Codes tab (see "<a href="#">Batch Job Settings, Bar Codes Tab</a>" on page 12-26). (This option is available when the Multiple page documents option is selected.)</p>

Element	Description
Clear all index values	Select this field to clear all index values between documents. In general, it is recommended that you clear values, so residual values are not left and incorrectly assigned to the next document. However, if documents are related, you may want to retain index values between documents. (This option is available when the Multiple page documents is selected.)
Keep document separator	Select this field to include the document separator as the first page of the document. Otherwise, document separator pages are deleted after processing.
Maximum number of pages in a document	Use this field to limit the number of images permitted in a document, in case a document separator was not detected. If Recognition Server reaches this number, images between the last valid document and the next separator sheet detected remain in the batch for manual indexing. For example, if you know that documents in the job's batches do not exceed 25 pages, enter this number to ensure that multiple documents are not filed together if a document separator page is not detected. (This option is available when the Multiple page documents option is selected.)
Limit batches per event	Select this field to limit the number of batches Recognition Server will process for a scheduled event before checking for other scheduled events and beginning their processing. Specify a number in the Maximum field.
Maximum	Enter the maximum number of batches to process. For example, suppose you have two events: the first contains 1,000 batches, the second contains 100, and the first event starts processing first. You may not want to wait until the first event completes before processing the second. Typing 100 in the Maximum field would halt processing after 100 batches are complete and Recognition Server would proceed to the other event. (The first event would not resume processing until its next scheduled time.)

### 12.2.8 Batch Job Settings, Bar Code Recognition Tab

Use this tab to specify which bar codes you want Recognition Server to recognize (if known) and how to read them. While accurate bar code recognition is most important, keep in mind that the more specific you can be about which bar codes are used, the faster Recognition Server can process batches in the job.



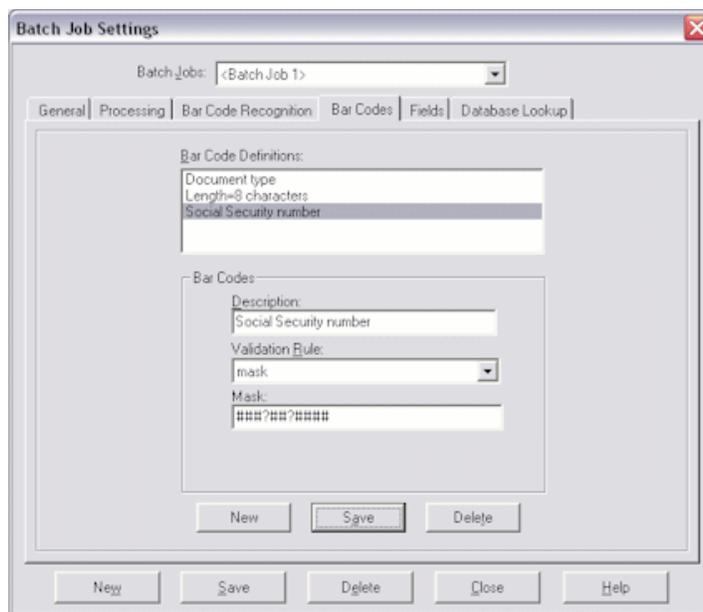
Element	Description
1-D and 2-D Symbologies	<p>Select all bar code symbologies you want Recognition Server to search for.</p> <ul style="list-style-type: none"> <li>1-D Symbologies you can choose include: Codabar, Code 128, Code 39, Code 93, EAN-13, EAN-8, Interleaved 2/5, UCC/EAN-128, UPC-A, UPC-E, Airline(IATA) 2/5, Code 32, Datalogic 2/5, Industrial 2/5, ISBN Addon 2, ISBN Addon 5, Matrix 2/5 and Postnet/Planet.</li> <li>2-D Symbologies you can choose include: DataMatrix and PDF417.</li> </ul>
Enable auto-detect	If you do not know which bar code symbologies are used, select this field, and Recognition Server will check for the most common bar codes. It is recommended to explicitly set the bar code symbology to recognize.
Patch Codes	Select this field if you want Recognition Server to detect patch codes for document separation. Then specify the actual patch code type you want detected in the Patch Code field on the Processing tab (see " <a href="#">Batch Job Settings, Processing Tab</a> " on page 12-41).
Number of bar codes to detect	By default, Recognition Server searches for as many bar codes as it can find on each image before going on to the next (All option). If you want Recognition Server to stop reading bar codes after finding a specified number, enter the number in the Limit to field.
Orientations	Specify the bar code orientations for which you want Recognition Server to search. Checking all three orientations (Horizontal, Vertical and Diagonal) is recommended.
Algorithm	Specify whether you want Recognition Server to focus on accuracy (Best Recognition) or speed (Best Speed) in reading bar codes. By default, Best Recognition is selected and recommended.

Element	Description
Validate optional checksum	Select this diagnostic option to enable checksum validation of bar codes. Checksum validation is optional in certain symbologies. It is recommended that you select this option if your bar code contains a check sum value. For example, if a Code 39 bar code does not contain a checksum, this setting prevents the bar code from being recognized. Also, if this option is not selected and a Code 39 bar code with a checksum is recognized, the checksum character will be included in the bar code data.
Display raw data	Select this diagnostic option to return any other characters within a bar code. Bar codes sometimes contain extra characters as part of their symbology. For example, the Code 39 symbology contains an asterisk at the beginning and end of its bar codes.

## 12.2.9 Batch Job Settings, Bar Codes Tab

Use this tab to define the bar codes to be read in the selected job's batches. For example, specify the number of characters in the bar code, its input mask, or its possible values. You can add, edit and delete bar code definitions on this tab.

As Recognition Server recognizes bar codes, they are assigned to their respective bar code definition based on their data characteristics. If a recognized bar code cannot be assigned to a bar code definition, it will be logged as an invalid bar code. You define bar codes by specifying their validation rule (bar code length, mask or pick-list) and corresponding value.



Element	Description
Validation Rule	Specify how Recognition Server should validate the bar code: by its length, using an <a href="#">Bar Code Definition Using an Input Mask</a> , or from a pick-list created in Capture Administration. After you select a rule, additional value options are displayed.

Element	Description
Value	<p>Specify how Recognition Server should validate the bar code: by its length, using an input mask, or from a pick-list created in Capture Administration. After you select a rule, additional value options are displayed.</p> <ul style="list-style-type: none"> <li>▪ <b>Length:</b> Enter the number of characters in the bar code. For example, if an alphanumeric account number is always eight characters in length, type 8 in this field.</li> <li>▪ <b>Mask:</b> Enter the validation mask that describes the bar code value. See <a href="#">"Bar Code Definition Using an Input Mask"</a> on page 12-27.</li> <li>▪ <b>Pick-list:</b> In the Pick-list Source field, select the pick-list source you want to use. From the list of pick-lists displayed for the selected source in the Pick-list field, choose a pick-list. For details about pick-lists, see <a href="#">"About Pick-lists"</a> on page 2-4. For example, if a batch job contains documents with bar codes that identify their document type, you might select a previously created document type pick-list containing values such as mortgage application, credit report, and credit reference. Any bar code value that is read that matches a pick-list value is assigned to the specified bar code definition.</li> </ul>

### 12.2.9.1 Bar Code Definition Using an Input Mask

To specify an input mask, select Mask in the **Validation Rule** field and enter a mask that describes the bar code value in the **Mask** field displayed. A recognized bar code will be assigned to this bar code definition if the value meets the requirements of the mask you specify. A mask may include the following characters listed in [Table 12-1](#).

**Table 12-1 Input Mask Characters**

Mask Characters	Matches	Explanation
?	Any single character	Use to match any single character.
*	Zero or more characters	Use to match zero, one, or more characters.
#	Any single digit (0-9)	Use to match any single number.  If a batch job contains documents with a Social Security number, the mask would be ###?##?####.
[ <i>charlist</i> ]	Any single character in <i>charlist</i>	Use to match any single character from a group of one or more characters defined in <i>charlist</i> . Be sure to include the brackets ([ ]). To search for a specific barcode such as <i>claim</i> , the format would be [c][l][a][i][m].  Use a hyphen (-) to specify a range of characters. Character ranges must be specified in ascending order ([A-Z], not [Z-A]). For example, [A-Z] results in a match if a character in the A-Z range is found.
[! <i>charlist</i> ]	Any single character not in <i>charlist</i>	Functions the same as [ <i>charlist</i> ], except that with the exclamation point, a match results if any character <i>except</i> the characters specified in [ <i>charlist</i> ] is found.

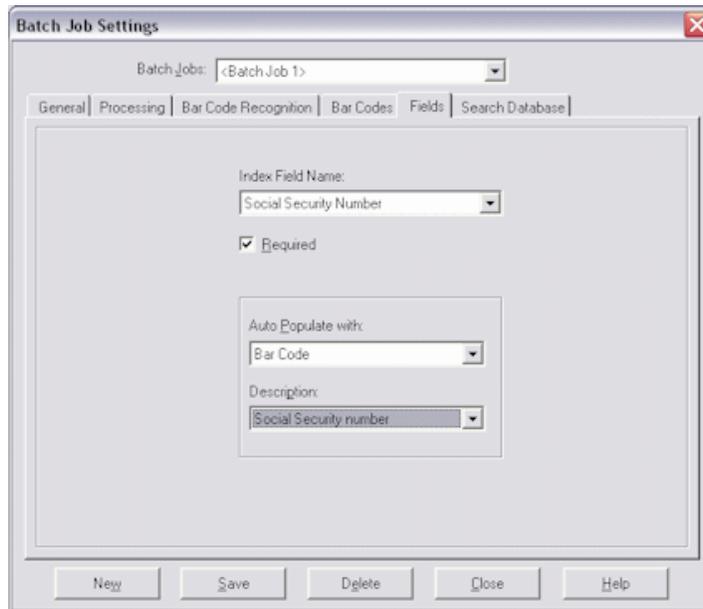
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**Note:** To match special characters (such as brackets ([ ]), question mark (?), number sign (#), and asterisk (\*)), enclose them in brackets. An exclamation point used outside the `[char]` brackets matches itself.

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## 12.2.10 Batch Job Settings, Fields Tab

Use this tab to make one or more index fields required or to autopopulate an index field during processing.

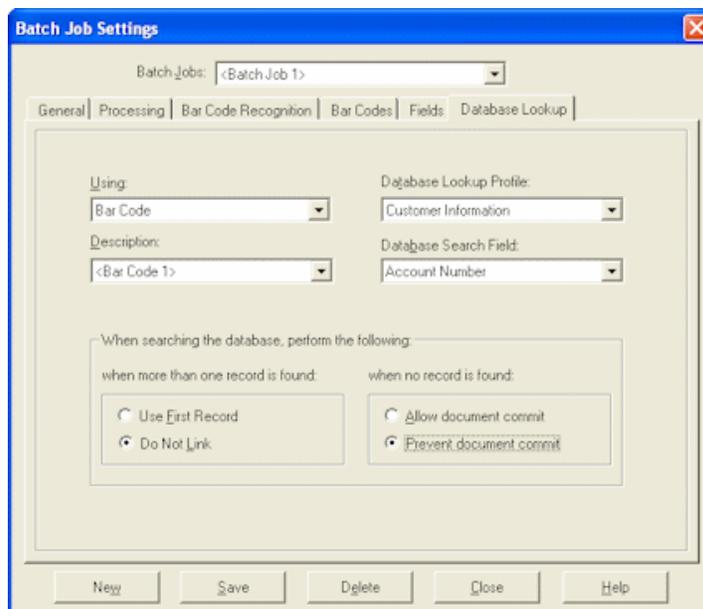


Element	Description
Index Field Name	Select an index field from those defined for the file cabinet selected for the batch job.
Required	Select this field to make the field required. If required fields are not populated during processing (for example, if a bar code cannot be read), affected images are not committed and remain in the batch, and a warning message is logged.
Auto Populate with	Select the value you want to assign to the selected index field. You can use the following: <ul style="list-style-type: none"> <li>Bar Code: Populates the index field with the bar code you select in the Description field that displays. Bar code definitions are set up on the Bar Codes tab (see <a href="#">"Batch Job Settings, Bar Codes Tab"</a> on page 12-26).</li> <li>Batch Name: Populates the index field with the batch name.</li> <li>Default: Populates the index field with the value you specify in the Value field that displays.</li> <li>Index Date: Populates the index field with the batch index date. Uses the format you select in the Date Format field that displays.</li> <li>Scan Date: Populates the index field with the batch scan date. Uses the format you select in the Date Format field that displays.</li> </ul>

## 12.2.11 Batch Job Settings, Database Lookup Tab

Use this tab to set a bar code value to search a table in an external database and populate fields using values returned from the table. Use this tab to specify the database lookup profile and configure the search. Note that you create database lookup profiles in Capture Administration.

For example, a document's bar code might contain a customer transaction number. By searching using this bar code's value, you could search a database and populate all index fields (for example, customer name and customer number) from the database lookup table.



To use the database lookup feature, first create a database lookup profile in Capture Administration. See ["About Database Lookups"](#) on page 2-5.

Element	Description
Using	Specify the method by which you want to perform the search. Select Bar Code or by Batch Name. (The Batch Name option is used in special cases only.)
Description	Select the bar code you want to use to search. You set up bar code descriptions on the Bar Codes tab (see <a href="#">"Batch Job Settings, Bar Codes Tab"</a> on page 12-26).
Database Lookup Profile	Select the database profile you created in Capture Administration.
Database Search Field	Select a search field from those defined in the database lookup profile.
When more than one record is found	Specify what happens if a database search matches more than one record in the specified database. Recognition Server can either return values for the first record it finds (Use First Record) or return no values (Do Not Link).
When no record is found	Specify what happens if Recognition Server finds no match in the specified database. You can either allow or prevent the affected document from being committed.

## 12.3 Import Server Screens

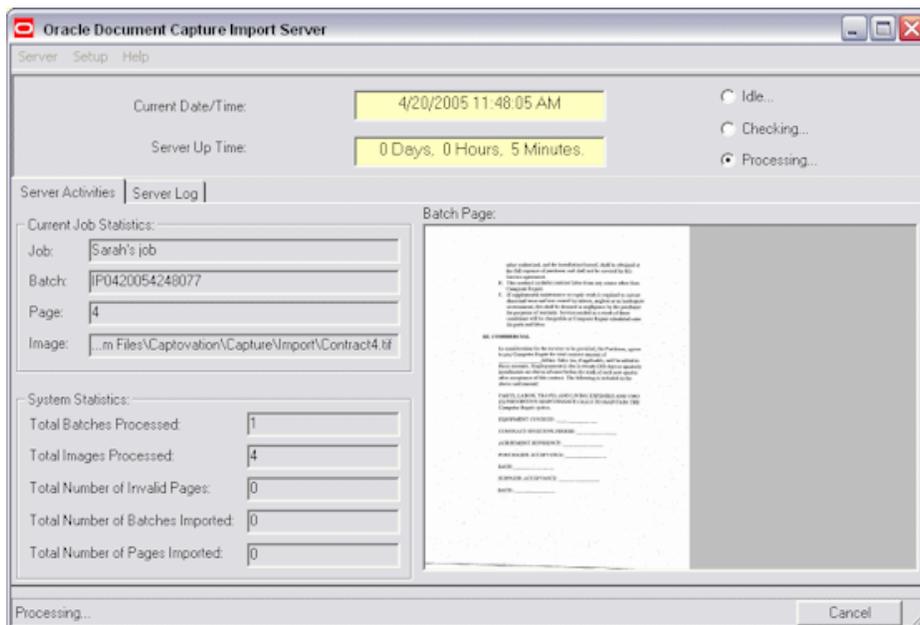
Import Server includes the following screens and dialog boxes:

- "Oracle Document Capture Import Server Screen" on page 12-30
- "Scheduler" on page 12-33
- "Schedule New Event" on page 12-33
- "Import Server General Settings" on page 12-34
- "Batch Job Settings" on page 12-38
- "Batch Job Settings, General Tab" on page 12-39
- "Batch Job Settings, Processing Tab" on page 12-41
- "Batch Job Settings, Image Output Tab" on page 12-42
- "Batch Job Settings, Email Provider Settings Tab" on page 12-44
- "Batch Job Settings, Folder/List File Provider Settings Tab" on page 12-51
- "Batch Job Settings, FaxPress Provider Settings Tab" on page 12-54
- "Batch Job Settings, FTP Provider Settings Tab" on page 12-55

### 12.3.1 Oracle Document Capture Import Server Screen

The Import Server screen is displayed when you start Import Server. Use this screen to create batch jobs, schedule when jobs are run, and view job processing statistics and errors.

To display this screen, choose Oracle Document Capture, then Import Server from the Start menu.



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**Note:** If there are jobs scheduled, Import Server starts in an active state. However, Import Server does not begin processing jobs for one minute, which gives you a chance to deactivate the server if you do not want it to process any scheduled jobs.

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During processing, a Cancel button displays that allows you to stop processing. When canceled, the server completes processing the current batch and then pauses. After activating the server, you will need a scheduled event to resume processing the batch job on which you paused.

The Import Server screen contains the following items.

- ["Import Server Menu"](#) on page 12-31
- ["Import Server Status"](#) on page 12-31
- ["Server Activities Tab"](#) on page 12-32
- ["Server Log Tab"](#) on page 12-32

### 12.3.1.1 Import Server Menu

The Import Server contains these menus:

Element	Description
Server Menu	<ul style="list-style-type: none"> <li>■ <b>Activate:</b> Starts the server, if paused. Selecting Activate changes the command to Pause. Choose Pause to deactivate the server to create and schedule batch jobs or change settings.</li> <li>■ <b>Schedule:</b> Create batch job processing events. See <a href="#">"Scheduler"</a> on page 12-33.</li> </ul>
Setup Menu	<ul style="list-style-type: none"> <li>■ <b>General Settings:</b> View or change Import Server settings. See <a href="#">"Import Server General Settings"</a> on page 12-34.</li> <li>■ <b>Batch Jobs:</b> Add or edit batch jobs that identify batches to be processed by Import Server. See <a href="#">"Batch Job Settings"</a> on page 12-38.</li> <li>■ <b>Batch Setup:</b> Specify where Capture batches are stored and committed, and configure and initialize the Capture database. See <a href="#">"Capture Batch Setup Screen"</a> on page 13-3.</li> <li>■ <b>Macro Manager:</b> Customize functionality through Visual Basic for Applications (VBA) compatible macros.</li> </ul>

### 12.3.1.2 Import Server Status

The Import Server displays status in the following fields:

Element	Description
Current Date/Time	Displays the date and time using current system settings.
Server Up Time	Displays the current session length in days, hours, and minutes.

Element	Description
Status	<p>Displays the server's status, where:</p> <ul style="list-style-type: none"> <li>Idle indicates that it is not time for any scheduled events.</li> <li>Checking indicates that the server has detected a scheduled event (batch job to process).</li> <li>Processing indicates that the server is committing batches.</li> </ul>

### 12.3.1.3 Server Activities Tab

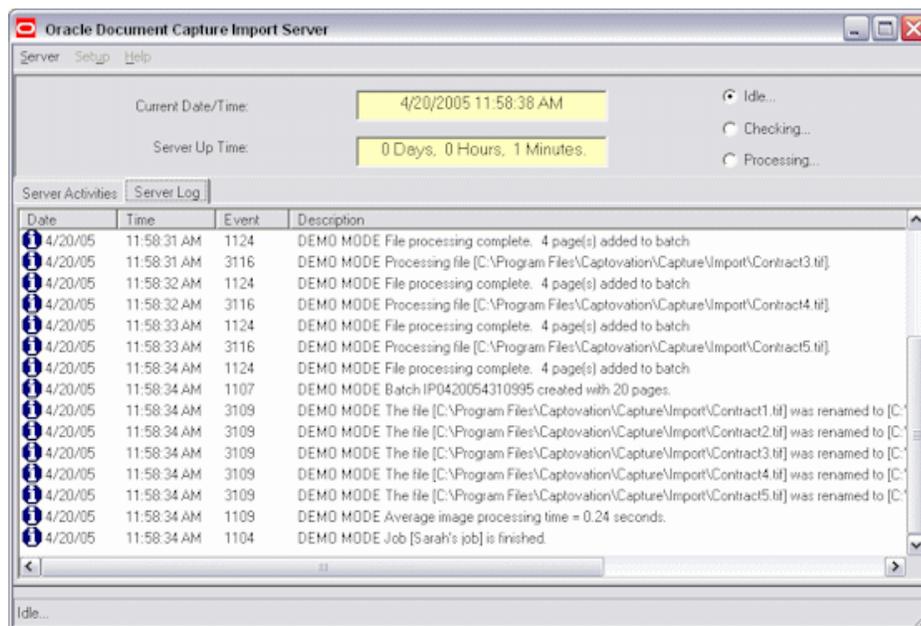
The Server Activities tab displays information about jobs that are currently processing or have been processed since the server began running. This information is deleted when a session ends (when Import Server is shut down). For each file cabinet being processed, Import Server displays the number of batches processed, documents created from those batches, and images in those documents. Import Server updates this list after each batch in a job finishes processing.

Processing details are displayed in the Current Batch Statistics and System Statistics areas. Information about batches processed is displayed in the Batches Processed table.

### 12.3.1.4 Server Log Tab

This tab displays processing messages generated since the server began running. These messages are also written to the log file. Information in this screen is periodically removed from the display to conserve memory.

A symbol is displayed next to messages. Informational messages display an i symbol, caution messages display an exclamation point symbol and error messages display a a stop sign symbol.

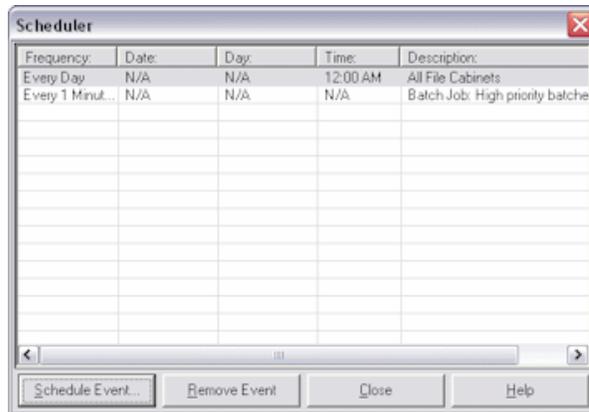


You select error-related settings in the Import Server Settings dialog box, as described in "Import Server General Settings" on page 12-34.

### 12.3.2 Scheduler

Use the Scheduler dialog box to schedule or remove batch job processing events.

To display this screen, pause the server if needed (choose **Pause** from the Server menu) and select **Schedule** from the Server menu of Import Server.



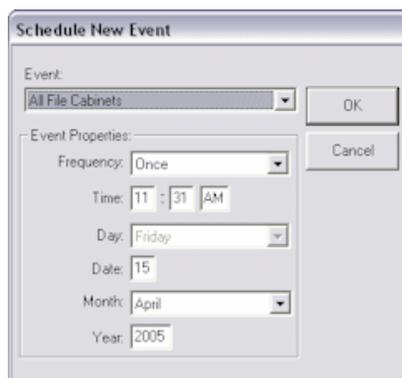
The following elements are on the Scheduler dialog box:

Element	Description
Events	Lists scheduled events, including their frequency, date, day, time and description.
Schedule Event	Click to schedule a new event.
Remove Event	Click to delete a selected event.

### 12.3.3 Schedule New Event

Use the Schedule New Event dialog box to create an event.

To display this screen, pause the server if needed (choose **Pause** from the Server menu), select **Schedule** from the Server menu of Import Server and click **Schedule Event**.



Element	Description
Event	Select the batch job to be processed. This field lists all file cabinets, each file cabinet separately and batch jobs that have been created in Import Server. It also contains an option called Delete Old Log Files, which you use to remove old log files that are no longer needed, and an option called Shut Down, which you can use to shut down Import Server unattended.
Frequency	Select how often you want the job processed. You can schedule the job to run once, every 1, 5, 15 or 30 seconds or minutes, every hour, every day, or every week.
Time, Day, Date, Month and Year	If you selected <b>Once</b> in the Frequency field, specify when in these fields. Time fields. If you select <b>Every Week</b> , specify a day and time.

### 12.3.4 Import Server General Settings

Use the following tabs on this dialog box to view or change Import Server settings.

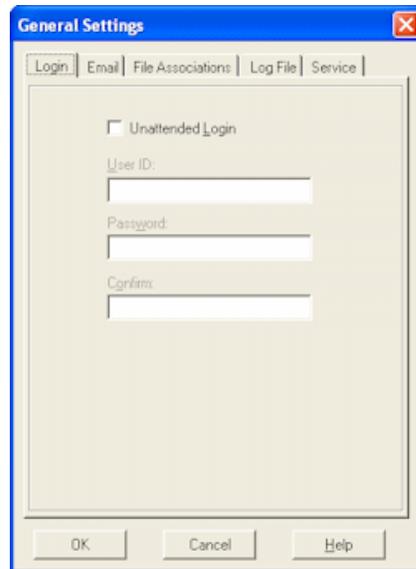
To display this dialog box, choose **General Settings** from the Setup menu of Import Server (if needed, choose **Pause** from the Server menu first).

Import Server Settings tabs include:

- ["Import Server Settings, Login Tab"](#) on page 12-34
- ["Import Server Settings, Email Tab"](#) on page 12-35
- ["Import Server Settings, File Associations Tab"](#) on page 12-36
- ["Import Server Settings, Error Log Tab"](#) on page 12-37
- ["Import Server Settings, Service Tab"](#) on page 12-38

#### 12.3.4.1 Import Server Settings, Login Tab

Use the Login tab to enter a user name and password so logging in is not required when Import Server is started. For example, you might include Import Server in a Windows reboot configuration; if the server goes down, it will reboot according to this configuration, and Import Server will start up without requiring login information.

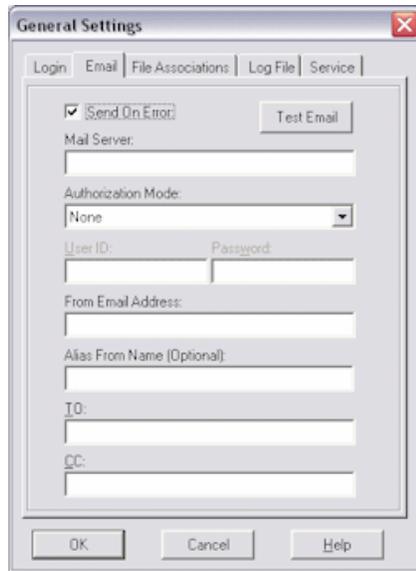


Element	Description
UnAttended Login	Select this field, then enter your user ID in the User ID field and enter your password in the Password and Confirm fields.

**Note:** If you selected Windows domain security as your security model, use the format \\domain\userID in the User ID field (for example, \\domain2\jdoe) to specify the domain along with the user name. For unattended login, the user must be added as an individual Capture user. For more information, see "[About Users in Capture](#)" on page 2-2.

#### 12.3.4.2 Import Server Settings, Email Tab

Use these options to specify who should receive an email if Import Server encounters an error while processing batch jobs. The subject of the error email is *Import Server - Critical Error Occurred*; it identifies the batch being processed when the error occurred and describes the error.

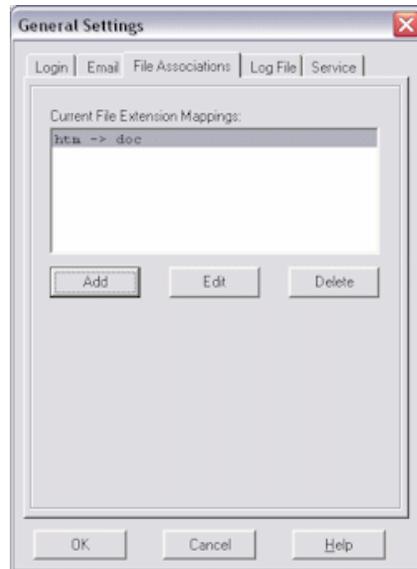


Element	Description
Send On Error	Select this field if you want an email sent.
SMTP Server Name	Specify the name of the server you are using to send emails.
Authorization Mode	Select a mode for which to authorize email sending. You can choose: None, AUTH LOGIN or CRAM-MD5.
User ID and Password	Enter a username and password for email authorization. If you selected None in the Authorization Mode field, you do not need to enter a user ID and password.
From Email Address	Enter the email address from which the error emails will be sent.
Alias From Name	Enter an alternate name from whom the emails will be sent.
To, Cc	Enter the email addresses of people to send the email to. Separate multiple email addresses in either field with a semi-colon (;).
Test Email	Click this button to send a test email. Import Server verifies the SMTP settings you specified, and sends a test email to all users specified in the To and Cc fields.

### 12.3.4.3 Import Server Settings, File Associations Tab

Use this tab to change the extensions of non-image files before they are printed by the Import Server and converted to images. This allows a different program to print a document file without having to change the Windows print associations for a particular document type.

For more information on when to use this option, see ["How Import Server Converts Non-Images to Images"](#) on page 1-21.



Element	Description
Add	Click to add a file association. In the dialog box that displays, enter the old and new extensions.
Edit	Make changes to a selected file association.
Delete	Click to delete a selected file association.

#### 12.3.4.4 Import Server Settings, Error Log Tab

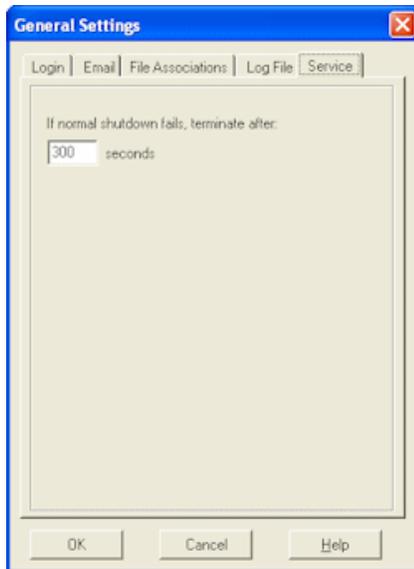
Use these options to specify how you want log messages saved. These log messages are also displayed on the Server Log tab.



Element	Description
Delete Old Log Files	Select this field to delete log files that exceed the number of days specified in the Days to Retain Log Files field. For example, type 14 to retain log files for two weeks. Note that in addition to selecting this field, you must also schedule this event in order to delete old log files; see " <a href="#">Scheduler</a> " on page 12-33.
Log Errors to NT Event Viewer	Select this field to write logs to the Windows Event Viewer. (Refer to your Windows documentation for more information.)

### 12.3.4.5 Import Server Settings, Service Tab

If running Import Server as a service, use this tab to specify how long to wait for the service to shut down normally. For more information, see "[Guidelines For Running Servers as Services](#)" on page 12-56.

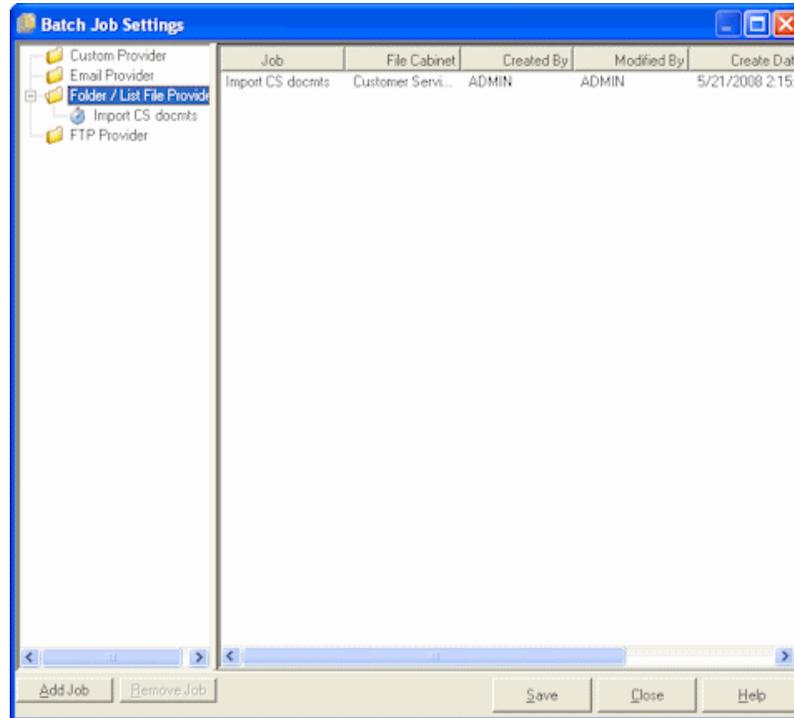


Element	Description
If normal shutdown fails, terminate after __ seconds	Specify the number of seconds (30-900) to wait for the service to shut down normally. (The default is 300 seconds.) If the server application does not shut down in this time, the server will be terminated. This could happen in instances where a large batch is still being processed or the application is not responding.

### 12.3.5 Batch Job Settings

Use this screen to add or edit batch jobs containing settings that identify images to import and how to import them.

To display this screen, choose **Oracle Document Capture**, then **Import Server** from the Start menu.



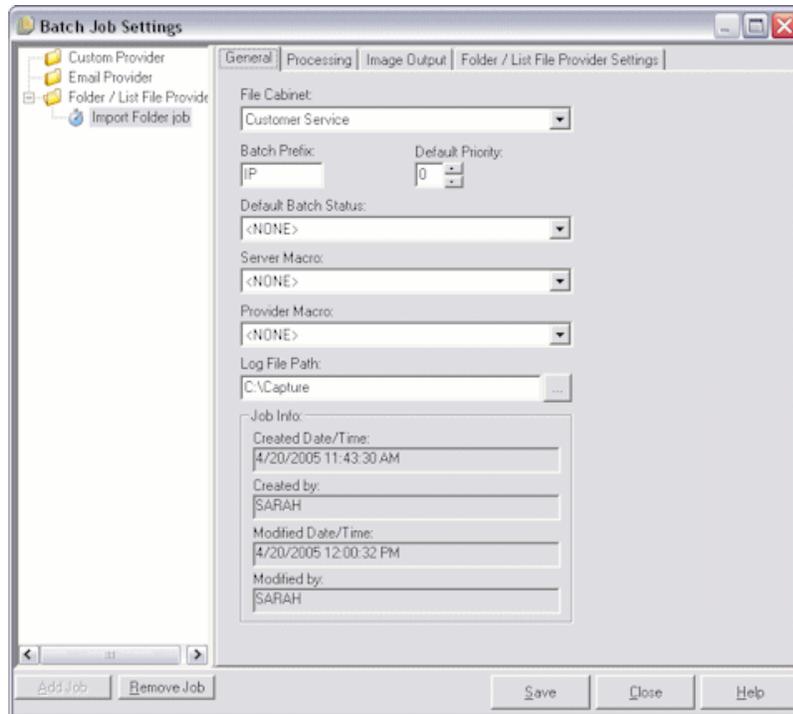
The side pane displays folders for installed providers. Depending on installed providers, some available import providers may not be displayed in the tree view. A plus (+) sign indicates jobs of the provider type.

The main pane lists details about a provider's jobs when a provider folder is selected. When a batch job is selected, this pane displays standard settings (on the General, Processing, and Image Output tabs) and provider-specific settings (on an additional tab). See information about the following tabs:

- "Batch Job Settings, General Tab" on page 12-39
- "Batch Job Settings, Processing Tab" on page 12-41
- "Batch Job Settings, Image Output Tab" on page 12-42
- "Batch Job Settings, Email Provider Settings Tab" on page 12-44
- "Batch Job Settings, Folder/List File Provider Settings Tab" on page 12-51
- "Batch Job Settings, FaxPress Provider Settings Tab" on page 12-54
- "Batch Job Settings, FTP Provider Settings Tab" on page 12-55

### 12.3.6 Batch Job Settings, General Tab

Use this tab to apply general settings to the selected batch job.

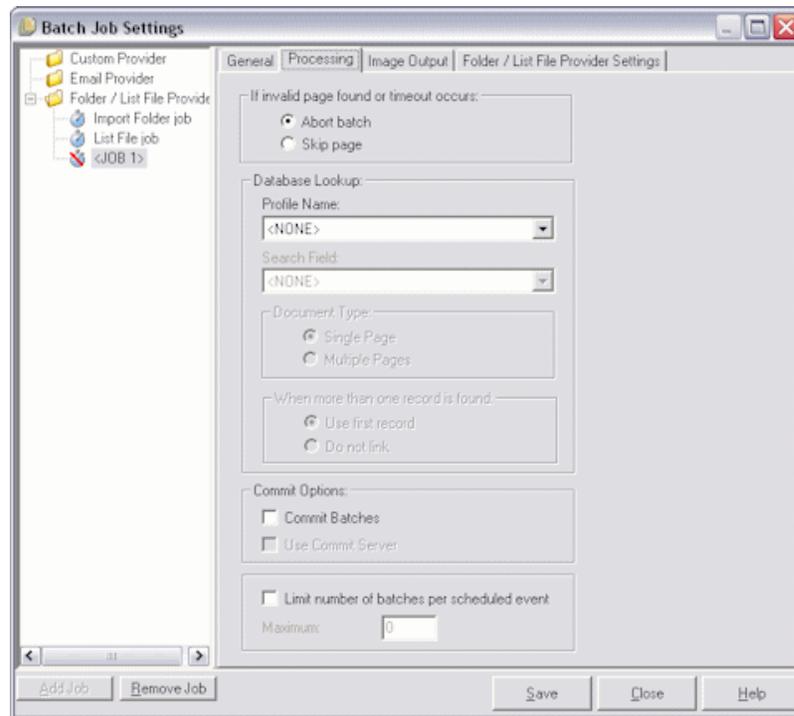


Element	Description
File Cabinet	Select the Capture file cabinet to use when creating batches and importing images. File cabinets and their fields are defined in Capture Administration.
Batch Prefix	Specify a prefix to use at the beginning of batch names when creating batches. Batch prefixes are useful to help identify different types of batches within the same file cabinet. For example, type <i>AP</i> in this field to save imported images using an <i>AP</i> (for Accounts Payable) prefix. See <a href="#">"How Import Server Names Batches"</a> on page 1-21. A batch prefix may contain up to eight characters. To omit a prefix, leave this field blank.
Default Priority, Default Batch Status	Specify a priority and/or status to be assigned to batches when they are created. Users can change the status or priority you select. You define statuses in Capture Administration.
Server Macro	Select a macro (VBA-compliant source code file) to be applied to the Import Server processing. For more information about Import Server macros, see the <i>Developer's Guide for Oracle Document Capture</i> .
Provider Macro	Select a macro (VBA-compliant source code file) to be applied to the import provider (Email, Folder or List File or Custom Provider) processing. For more information about Import Server macros, see the <i>Developer's Guide for Oracle Document Capture</i> .
Log File Path	Specify where Import Server stores the log files it creates each day. Log files are named using IS as a file prefix followed by the current date (for example, IS01-01-2008.log).

Element	Description
Job Info	The Created Date/Time, Created By, Modified Date/Time and Modified By fields are display-only fields that indicate the administrator who created and last modified the batch job.

### 12.3.7 Batch Job Settings, Processing Tab

Use this tab to select processing settings for the selected batch job.

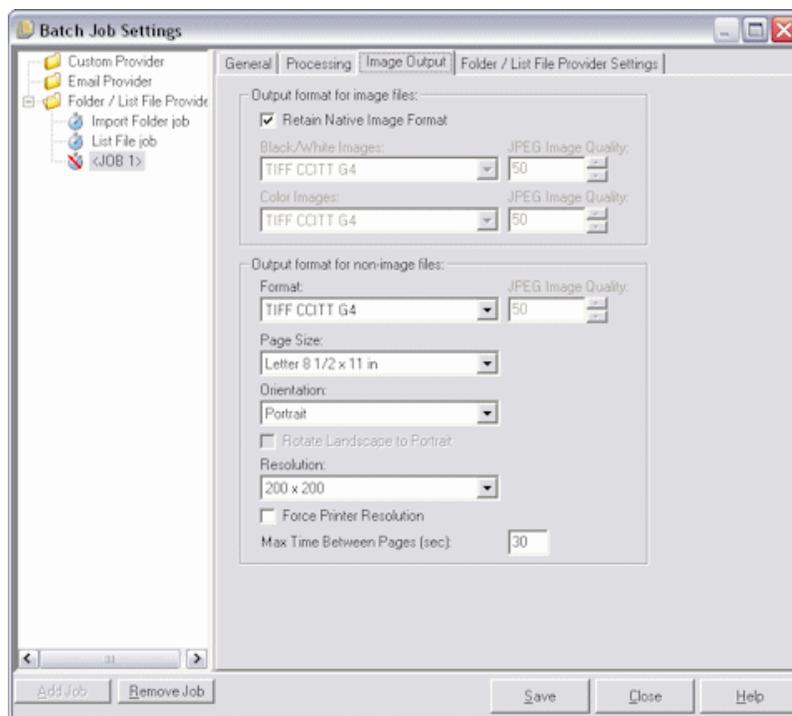


Element	Description
If invalid page found or timeout occurs	Specify what Import Server should do if it encounters an image page that fails validation or a non-image file times out during conversion (cancel creating the batch or skip the invalid page).  If you choose Skip page and a processing error occurs, Import Server writes an *.ERR file that identifies the offending file and the reason for the import failure. This allows you to fix the problem, and if using a list file, rename the *.ERR file to *.LST for reprocessing.

Element	Description
Database Lookup	<p>Use these options to configure a database lookup profile for use in this batch job. You create database lookup profiles in Capture Administration, as described in "<a href="#">About Database Lookups</a>" on page 2-5.</p> <ul style="list-style-type: none"> <li>■ <b>Profile Name:</b> From the list of lookup profiles for the selected file cabinet, choose the lookup profile whose data you want to search.</li> <li>■ <b>Search Field:</b> From the search fields defined for the selected lookup profile, choose the database field you want to search.</li> <li>■ <b>Document Type:</b> Specify if you are importing multiple or single page documents with this batch job. This setting affects how Import Server performs the database search.</li> <li>■ <b>When more than one record is found:</b> Specify what happens if the specified list file value matches more than one record in the database. Import Server can either return values for the first record it finds (Use first record) or return no values (Do not link).</li> </ul>
Commit Options	<p>Use these options to specify how batches imported into Import Server are committed.</p> <ul style="list-style-type: none"> <li>■ <b>Commit Batches:</b> Select this field to commit batches as they are imported. Since batches must be indexed before committing, you must populate index fields using a list file that contains index values, using a macro that assigns index values or using a database lookup that populates index fields.</li> <li>■ <b>Use Commit Server:</b> Select this field to commit batches using Commit Server. (The Commit Batches option must be checked to select this option.) If this field is selected, Import Server marks each batch as ready to be committed by Commit Server after importing, instead of actually committing it.</li> </ul>
Limit number of batches per scheduled event	<p>Select this field to limit the number of batches Import Server will process for a scheduled event before checking for other scheduled events and beginning their processing. Specify a number in the Maximum field. For example, suppose you have two events: the first contains 1,000 batches, the second contains 100, and the first event starts processing first. You may not want to wait until the first event completes before processing the second.</p>
Maximum	<p>Enter the maximum number of batches to process. Entering 100 in the Maximum field would cause the first event to halt processing after 100 batches are complete and Import Server would proceed to the second event. The first event would not resume processing until its next scheduled time.</p>

### 12.3.8 Batch Job Settings, Image Output Tab

Use this tab to specify a different format for image and non-image files. Non-image files refer to files saved in PDF, text or DOC (Microsoft Word) format, for example. During importing, images can be converted to a standard format.




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**Note:** You can also configure a file cabinet’s commit profile to convert images to a different output format when they are committed. For more information, see ["About Document Output Formats"](#) on page 2-8.

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Use the **Output format for image files options** to save image files you import in a standard format.

Use the **Output format for non-image files options** to convert non-image electronic files you import, such as PDF documents, HTML files, Microsoft Word documents, and text documents. Converting these documents into industry-accepted image formats is useful for long-term preservation of documents. For more information, see ["How Import Server Converts Non-Images to Images"](#) on page 1-21.

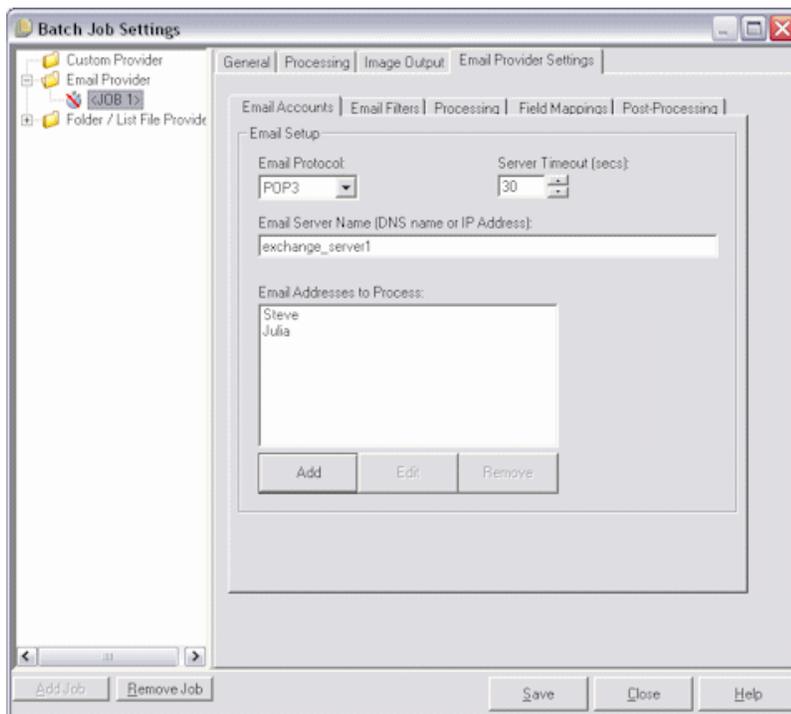
The Image Output tab of the Batch Job Settings screen contains the following field elements:

Element	Description
Retain Native Image Format	Select this field to keep images in the format in which they are imported. This is the default setting. <b>Note:</b> Images will still be validated to ensure they work correctly within Capture.
Black/White Images, Color Images	To convert images, select a JPG or TIFF format. If you choose a JPG format, specify a value in the JPG Image Quality field from between 0 and 99, where 99 is the highest quality and 50 is the default setting.

Element	Description
Format	Select the output format into which you want non-image files converted. If you choose the JPG format, specify a value in the JPG Image Quality field from between 0 and 99, where 99 is the highest quality and 50 is the default setting.
Page Size	Select the page format you want used for converted non-image files.
Orientation	Select the page orientation you want used for converted non-image files: Portrait (default) or Landscape. If you select Landscape, select the Rotate Landscape to Portrait field to rotate landscape images to a portrait orientation.
Resolution	Select the resolution at which you want the converted images saved. Select the <b>Force Printer Resolution</b> field to use the resolution set in the printer's print references.
Max Time Between Pages (sec)	Use this setting to specify the number of seconds to allow image conversion processing before aborting and proceeding to the next file. The default setting is 30 seconds.

### 12.3.9 Batch Job Settings, Email Provider Settings Tab

Use the Email Provider Settings tab to specify settings for a selected Email Provider batch job. When the job is activated, the provider checks the specified email accounts for messages, looks for emails and attachments containing specified text or particular file extensions, processes the attachments, populates index fields with email data, and deletes and optionally forwards the messages.

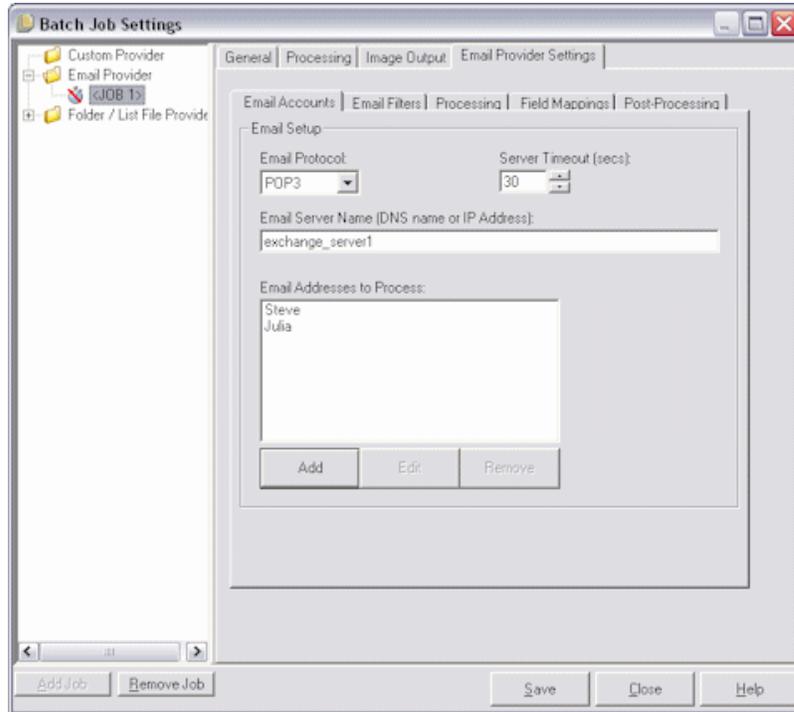


The Email Provider Settings tab contains these tabs:

- "Email Accounts Tab" on page 12-45
- "Email Filters Tab" on page 12-46
- "Processing Tab" on page 12-47
- "Field Mappings Tab" on page 12-48
- "Post-Processing Tab" on page 12-49

### 12.3.9.1 Email Accounts Tab

Use this tab to configure the email accounts that Import Server will check for messages when the batch job is run.

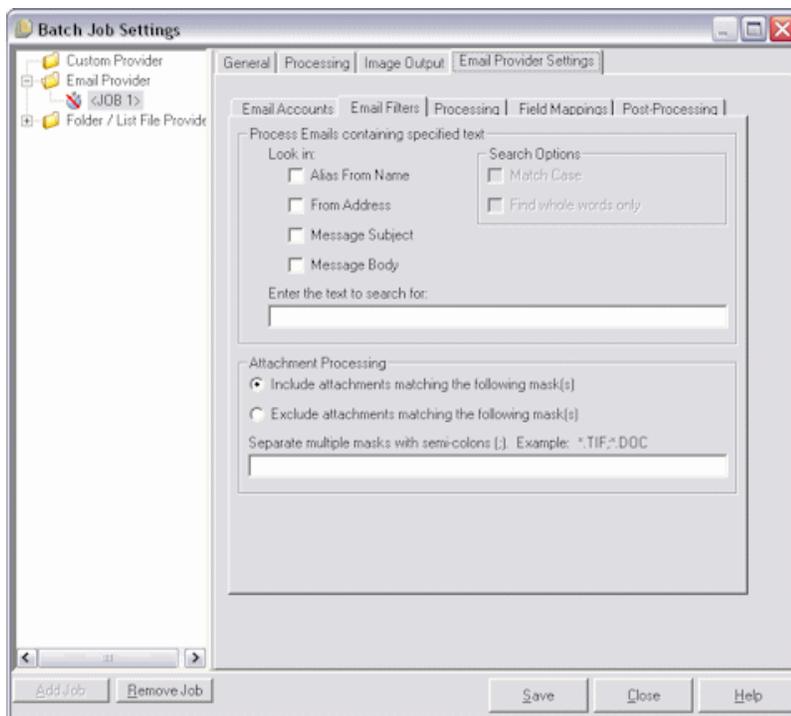


Element	Description
Email Protocol	Select the protocol to be used when receiving emails from specified accounts. You can choose POP3 or IMAP.
Server Timeout	Specify the number of seconds Import Server attempts to communicate with the email server before it times out.
Email Server Name	Specify the server name where the email accounts reside. You can enter the DNS name or the IP Address.

Element	Description
Email Addresses to Process	Lists the email addresses to be checked for messages. Click Add to add a new address or Edit to change a selected address. (Click Remove to delete a selected address, and it is removed.) In the Add/Edit Email Address dialog box that displays, enter the email account username (no @ symbol or company address are needed) and password, then click Verify to verify it; Import Server displays a message, informing you if it successfully connected to the specified server and found email messages in that user's mailbox.

### 12.3.9.2 Email Filters Tab

Use this tab to define the emails you want Import Server to search for and process.



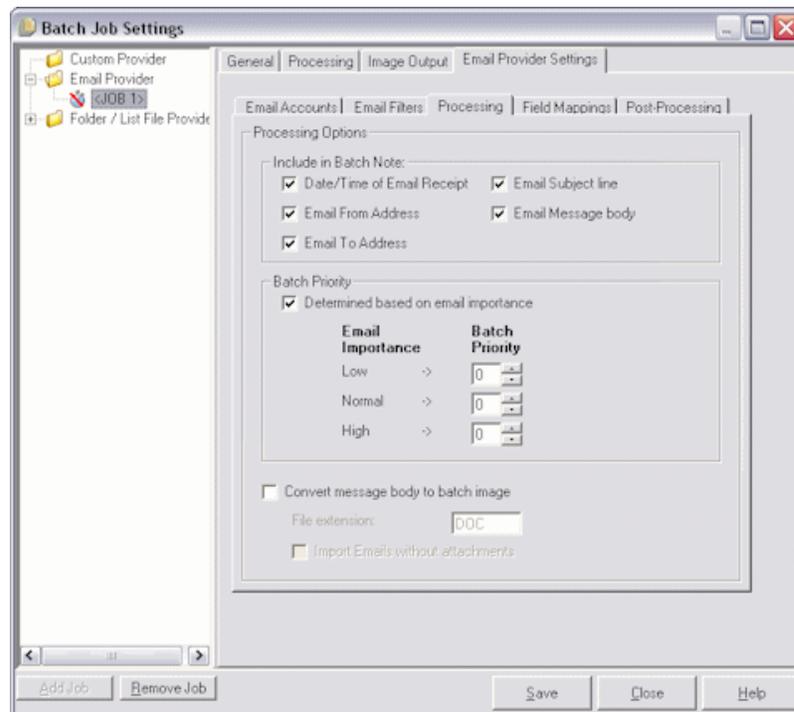
**Note:** The Email Provider searches a user's main Inbox only, ignoring any emails in subfolders.

Element	Description
Process emails containing specified text	Use this area to specify email text that Import Server must find in order to process an email.
Enter the text to search for	Enter characters in this field, then select where the text may appear by checking the appropriate Look in boxes. Note that Import Server will import the email if it finds the specified text in any of the places chosen. For example, if it is looking for <i>Image import</i> and the Message Subject and Message Body boxes are checked, Import Server imports the email if it finds the text in either the subject OR the body.

Element	Description
Match Case	Select this field if the case of each character in the specified text must match in order to import the email. If this field is selected, for example, <i>Email</i> and <i>email</i> would not match.
Find Whole Words Only	Select this field if only complete words can result in a match.
Attachment Processing	<p>Use this section to specify one or more masks that must match in order for Import Server to either process or not process an attachment.</p> <p>Enter the mask(s) in the text field, separating masks with a semi-colon.</p> <p>For example, you might select the Include radio button and enter *.TIF;*.JPG in the text field. This would instruct Import Server to import all email attachments with a TIF or JPG extension.</p> <p><b>Note:</b> To process all attachments, set the mask to *.*.</p> <p>Or, you might select the Exclude radio button and enter *.DOC;*.EXE in the text field. This would instruct Import Server NOT to import email attachments with a DOC or EXE extension.</p>

### 12.3.9.3 Processing Tab

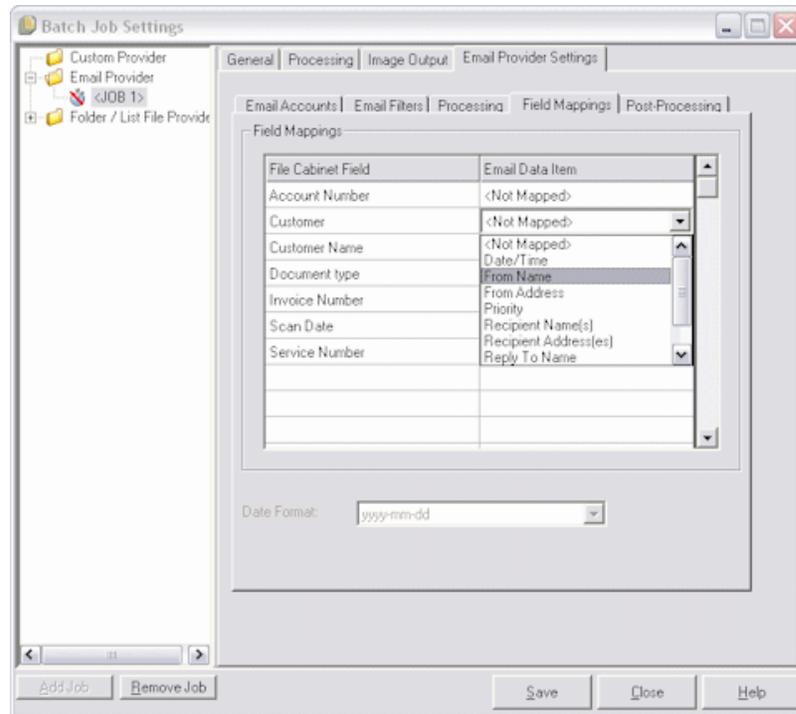
Use this tab to specify how you want the email messages and their attachments processed. For example, specify the information you want to include in a batch note, and the priority number you want assigned to batches, based on their assigned email priority.



Element	Description
Include in Batch Note	Select the fields corresponding to the email details you want included. Import Server will enter them into a note attached to the Capture batch it creates when importing the email. For example, you might want the email's subject and from address imported into each batch's note for reference purposes.
Batch Priority	Select this field to automatically assign a priority to each new batch based on its email's priority. Then specify a number from 0 to 10 to assign to low, normal and high priority emails. For example, if you enter 2, 5 and 8 in the Low, Normal and High fields respectively, Import Server would assign all low priority emails a batch priority of 2 in Capture, all normal priority emails a batch priority of 5, and all high priority emails a batch priority of 8. Note that emails not assigned a priority are considered normal priority.
Convert message body to batch image	<p>Use these options to print email message text to images using the Capture virtual print driver. If this field is not checked (the default setting), Import Server imports emails with attachments only and ignores message body text.</p> <ul style="list-style-type: none"> <li>■ File Extension: Enter the file extension of the application to use to print the email text. To facilitate the processing of both types of email (text and HTML), it is recommended that you use an application such as Microsoft Word for printing.</li> <li>■ Import Emails without attachments: Select this field to convert the message text of email messages that do not have attachments. (By default, Import Server imports emails with attachments only.)</li> </ul>

#### 12.3.9.4 Field Mappings Tab

Use this tab to assign key email values to Capture index fields. Email values are assigned to all images within the batch associated with the specified email.

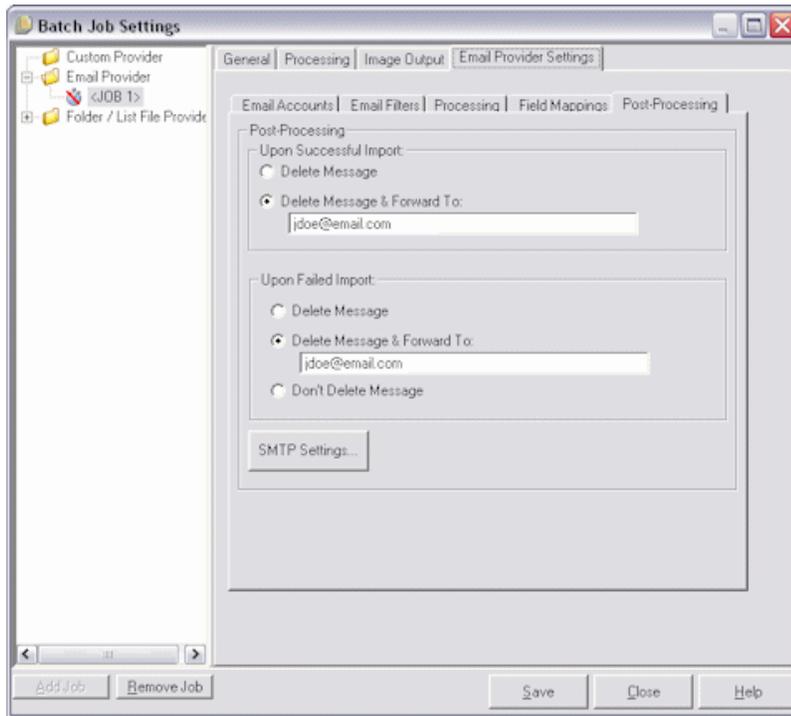


Element	Description
File Cabinet Field	text
Email Data Item	<p>Lists Capture index fields for the selected file cabinet.</p> <ul style="list-style-type: none"> <li>■ <b>Date/Time:</b> Message date and time</li> <li>■ <b>From Name:</b> Message sender name</li> <li>■ <b>From Address:</b> Message sender email address</li> <li>■ <b>Priority:</b> Message priority (Low, Normal or High)</li> <li>■ <b>Recipient Names:</b> Message recipient(s). Multiple names are separated with a semi-colon.</li> <li>■ <b>Recipient Address:</b> Recipient email address(es). Multiple names are separated with a semi-colon.</li> <li>■ <b>Reply To Name:</b> Entity to receive all replies to the message</li> <li>■ <b>Reply To Address:</b> Email address of entity to receive all replies to the message</li> <li>■ <b>Subject:</b> Message subject</li> </ul>
Date Format	If you map an index field to an email date field, choose the format in which you want the date stored in the field.

### 12.3.9.5 Post-Processing Tab

Use this tab to specify what happens to email messages after importing. When deleting messages, do you also want them forwarded to another account? For

example, you might delete messages that were successfully imported, but forward messages that failed import.



Element	Description
Upon Successful Import	Specify whether you want emails deleted or deleted and forwarded to specified email address(es). Separate multiple email addresses with a semicolon (;). If you specify a forwarding address, click SMTP Settings and configure the email server and account to use when forwarding the message.
Upon Failed Import	Specify whether you want emails deleted, deleted and forwarded to specified email address(es), or not deleted. Separate multiple email addresses with a semicolon (;). If you specify a forwarding address, click SMTP Settings and configure the email server and account to use when forwarding the message.

### 12.3.9.6 SMTP Email Settings Dialog Box

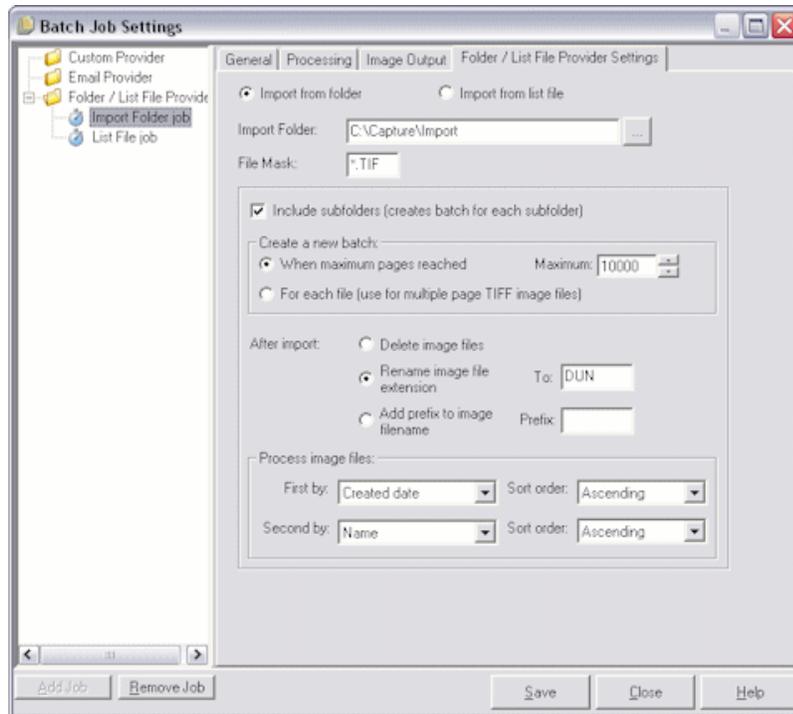
The SMTP Email Settings dialog box is accessed by clicking SMTP settings on the Post-Processing tab of the Email Provider Settings tab on the Batch Job Settings screen.

The SMTP Email Settings dialog box contains the following options:

Element	Description
SMTP Server Name	Specify the name of the server you are using to forward emails.
Authorization Mode	Select a mode for which to authorize email forwarding. You can choose: None, AUTH LOGIN or CRAM-MD5.
User ID and Password	Enter a username and password for mail forwarding authorization. If you selected None in the Authorization Mode field, you do not need to enter a user ID and password.
From Email Address	Enter the email address from which the emails will be forwarded.
Alias From Name	Enter an alternate name from whom the emails will be forwarded.
Test Email	Click this button to send a test email. Import Server verifies the SMTP settings you specified, and sends the recipients you specify in the dialog box below an email with the results.

### 12.3.10 Batch Job Settings, Folder/List File Provider Settings Tab

Use this tab to apply folder or list file settings to the selected batch job.



This tab's options change, depending on the selected import setting. See the following settings:

- ["Import From Folder Settings"](#) on page 12-52
- ["Import From List File Settings"](#) on page 12-53

### 12.3.10.1 Import From Folder Settings

Select **Import from folder** to display the Folder options on the Folder/List File Provider Settings tab.

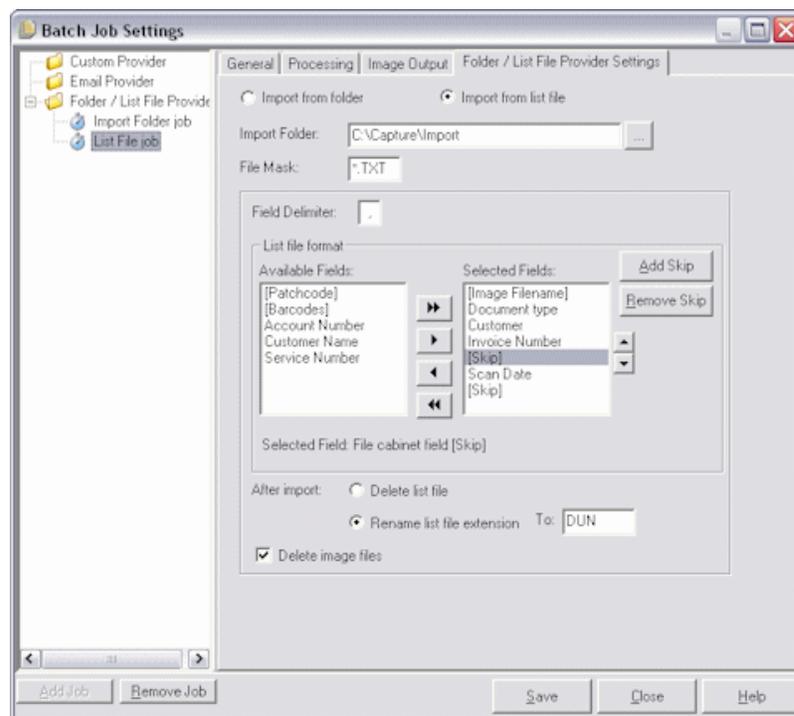
Element	Description
Import Folder	Folder in which Import Server will look for files to import. You can use folders that are representative of mapped drive letters or UNC (Universal Naming Convention) paths.
File Mask	Controls which files Import Server imports from the specified import folder. For example, type *.TIF to import TIFF images or *.* to import all files.
Include subfolders	Select this field if you want Import Server to also search subfolders beneath the selected import folder; leave the field deselected to ignore subfolders.  <b>Note:</b> Import Server always creates a new batch for each subfolder processed.
Create a new batch	Specify how you want Import Server to complete processing one batch and start a new one. You can select When maximum pages reached and enter a number in the Maximum field. Or, if you are importing files containing multiple images (for example, multiple page TIFF files), choose For each file to create a batch for each file imported.

Element	Description
After import	Specify how you want image files changed, so they are not imported again if the batch job is run continuously. You can either delete the files, change their extension (for example, to DUN to indicate that they are done), or add a prefix to them (for example, IMPD).
Process image files	Specify the order in which you want files in the import folder imported. You can import them by None, Name, Extension, Created date, Modified date or Accessed date. You can specify a primary and secondary sort order, and choose Ascending or Descending.

### 12.3.10.2 Import From List File Settings

Select **Import from list file** to display the List File options on the Folder/List File Provider Settings tab.

A list file contains records of delimited data, including the names of files to be imported. A list file may also include index values to pass into a Capture batch or values to be matched against a database file.

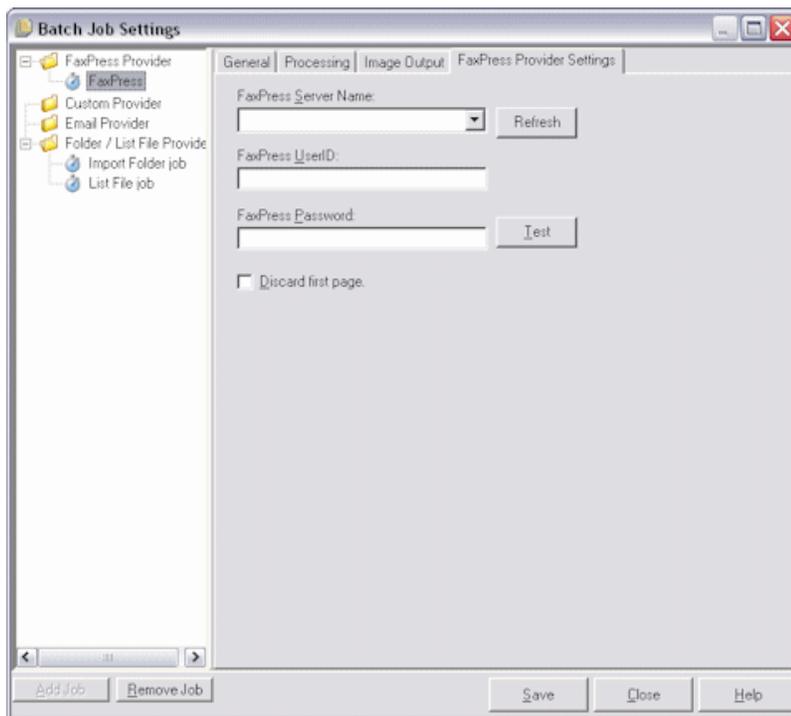


Element	Description
Import Folder	Folder in which Import Server will look for list files to process.
File Mask	Controls the type of list files Import Server processes. For example, type *.LST to specify list files with an LST extension.
Field Delimiter	Specifies how fields are delimited in the list file. You can specify any character. For example, use   (pipe), , (comma) or ~ (tilde).

Element	Description
List file format	Use this area to identify how fields are formatted in the list file, by moving available fields to the Selected Fields field and placing them in the same order as they reside in the list file. Fields in brackets are system-defined fields; non-bracket fields are index fields defined for the selected Capture file cabinet. You must include the [Image Filename] field, which identifies the name and path of files to be imported. Include the [Skip] field to skip reading a field in the list file.
After import	Specify if you want the list file changed or deleted, so it is not read again if the batch job is run continuously. You can either delete the list file or change its extension (for example, to DUN to indicate that it is done).
Delete image files	Select this field if you want image files deleted after they are successfully imported.

### 12.3.11 Batch Job Settings, FaxPress Provider Settings Tab

Use the FaxPress Provider Settings tab to specify settings for the selected FaxPress batch job. When a FaxPress job is activated, the FaxPress Provider logs into the specified FaxPress fax server appliance, checks the user's Inbox for faxes, and if found, imports and then deletes the faxes.




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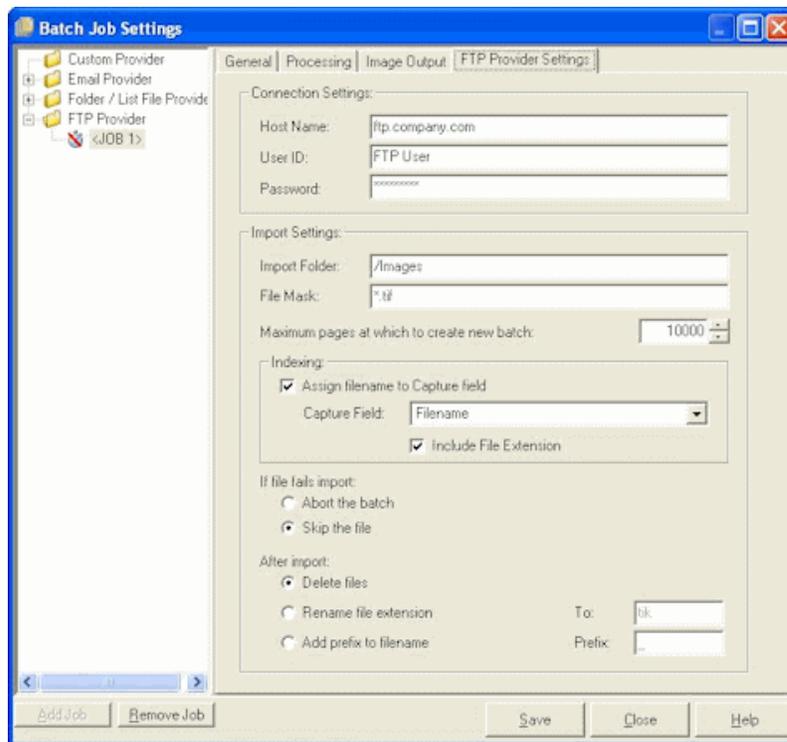
**Note:** Before importing faxes using the FaxPress Provider, install and configure the Castelle FaxPress Client on the Import Server.

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Element	Description
FaxPress Server Name	Specify the name of the FaxPress Server from which you want to import faxes. This field lists all FaxPress Servers that were detected. Click the Refresh button to detect servers again. If the server you want still does not appear in the list, verify that you can view the server on this workstation by running the FaxPress client.
FaxPress UserID, FaxPress Password	Specify the name and password of the user you want Import Server to log in as. (This user account must be configured in FaxPress.) Click the Test button to verify that the Server, UserName and Password combination is valid.  <b>Note:</b> To import faxes from multiple FaxPress inboxes, configure multiple batch jobs for each user ID.
Discard first page	Select this field to omit the first page of each fax from the batch. You would do this, for example, if you know that the first page of each fax being received by the FaxPress Provider contains a cover page. The FaxPress Provider will ignore the first page and import all pages after it.

### 12.3.12 Batch Job Settings, FTP Provider Settings Tab

Use the FTP Provider Settings tab to specify settings for the selected FTP Provider batch job. When the job is activated, the provider connects to the specified FTP Server, looks for images and/or documents and processes them, importing each page as an image.



Element	Description
Connection Settings	Specify the host name of the FTP server, and a user ID and password with which to connect to it.
Import Folder	Specify the folder on the FTP server from which to download and import documents.
File Mask	To limit the type of files imported from the specified import folder, enter an extension. For example, type *.TIF to import TIFF images or *.* to import all files.
Maximum pages at which to create new batch	Specify the maximum number of pages to allow in a batch before Import Server creates a new batch. The default is 10,000.
Indexing	Use these options to automatically assign the imported file's name to a Capture index value. Select <b>Assign filename to Capture field</b> and select the Capture field to which to write the filename, selecting the Include File Extension field to include the extension in the index value.
If file fails import	Specifies what Import Server should do if it encounters a file that fails importing (cancel creating the batch or skip the failed file).
After import	Specify if you want the imported files changed or deleted after they are successfully imported, so they are not imported again if the batch job is run continuously. You can delete the files, change their extension or add a prefix to their filenames. If renaming their extension, specify a new extension in the To field. If adding a prefix, specify the prefix in the Prefix field.  <b>Note:</b> Ensure that the FTP login account has permission to delete or rename files.

## 12.4 Guidelines For Running Servers as Services

Follow these guidelines when running Commit Server, Recognition Server or Import Server as a service instead of an application.

- If a license for Recognition Server cannot be found, an error is logged and the service is stopped.
- To prevent access issues, use local or UNC paths (rather than mapped drives) to identify folders the server will read from and write to. (This includes batch and commit folders and folders to be read by the Import Server.)
- Two instances of a server cannot run at the same time. However, users can run the server as a service and then open the server as a program to change settings. When launching the program, a message displays that the application is running as a service and warns that you will be allowed to change settings only. The submenu commands for Activate/Pause change to Start Service/Stop Service, respectively.
- Messages that appear during startup or processing when running the servers as programs do not appear when running as services, but are logged to the event log instead.
- If the service does not start as expected, open the Windows Event Viewer, view VBRuntime errors and view details. For example, if you fail to enter the correct password on the Unattended Login tab, the service cannot start because the user authentication fails.

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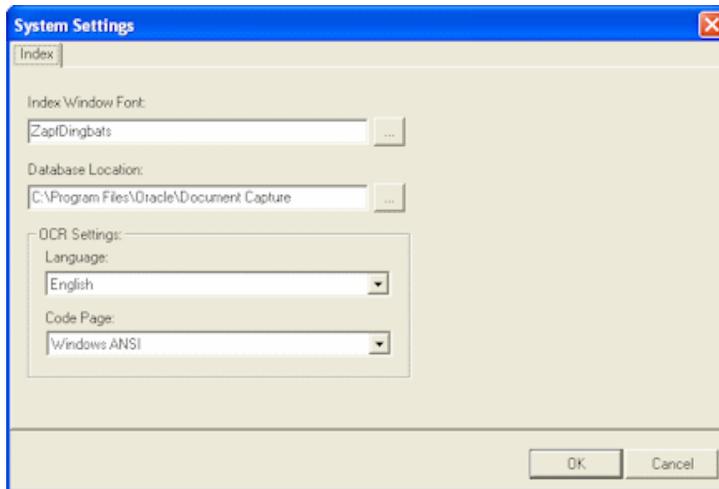
## Capture Administration User Interface

This chapter contains information about the user interface for Capture Administration. The following screens are described in this chapter:

- "System Settings Screen" on page 13-1
- "Manage Macros Screen" on page 13-2
- "Capture Batch Setup Screen" on page 13-3
- "Security Model Screen" on page 13-5
- "File Cabinets Screen" on page 13-6
- "Index Fields Screen" on page 13-6
- "Batch Status Screen" on page 13-8
- "Commit Profiles" on page 13-8
- "Database Lookups Screens" on page 13-52
- "Users Screen" on page 13-56
- "Pick-list Sources Screen" on page 13-58
- "Pick-list Relationships Screen" on page 13-63
- "Locked Batches Screen" on page 13-64
- "Import/Export Utility Screen" on page 13-65

### 13.1 System Settings Screen

Use this screen to select index settings for this workstation. (This screen applies to Oracle Document Capture only.)

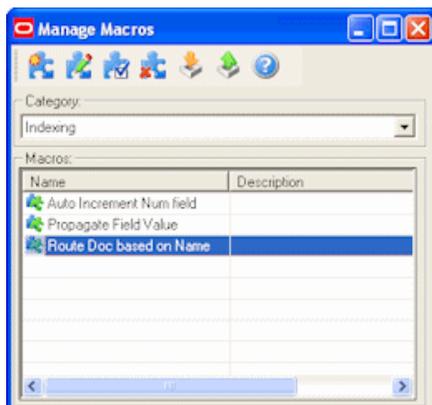


To display this screen, choose **Settings** from the System menu of Oracle Document Capture.

Element	Description
Index Window Font	Select the font you want displayed to the user in index field entries in the Indexing screen.
Database Location	Specify the location of the index database. The index database (indexing.mdb) stores index profiles. In a network environment with multiple index workstations, sharing the index database is recommended.
OCR Settings	In the <b>Language</b> field, select the language in which you want OCR text captured. In the <b>Code Page</b> field, change the character set to be used for storing OCR text, if needed.

## 13.2 Manage Macros Screen

Use this screen to customize functionality through Visual Basic for Applications (VBA) compatible macros.



Element	Description
Category	Select a category. For example, in Oracle Document Capture, you can choose Electronic Document Provider, Index or Scan; in Recognition Server, you can choose Recognition Server or Electronic Document Provider.
Macros	Lists macros for the category you selected.
New	Creates a new macro. Prompts you to enter a name and description, then creates a macro of the type selected in the Category field.
Design	Displays the Macro Editor for writing macros.
Setup	Opens a setup screen previously created in the Macro Editor.
Delete	Deletes the selected macro.
Import	Displays options for importing a macro (.bas) file and creating a new macro.
Export	Displays options for exporting the selected macro to a macro (.bas) file.

---

**Note:** Press F1 to view help in the Macro Editor. The Macro Editor allows you to design macros. Each Oracle Document Capture program exposes one or more event objects that you can select from the Object list. Once selected, the corresponding events (i.e., procedures) appear in the Proc list. The macro editor supports intellisense, which automatically displays the parameters needed for functions and procedures. Once you have developed a macro, you can quickly test to see if it will compile, by clicking the Start button. If an error is encountered within the macro, a message is displayed with the error description and line number. In addition, the line with the error number is highlighted in red.

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To display this screen, choose **Manage Macros** from the System menu of Oracle Document Capture. In Recognition Server and Import Server, choose **Pause** from the Server menu, then choose **Macro Manager** from the Setup menu.

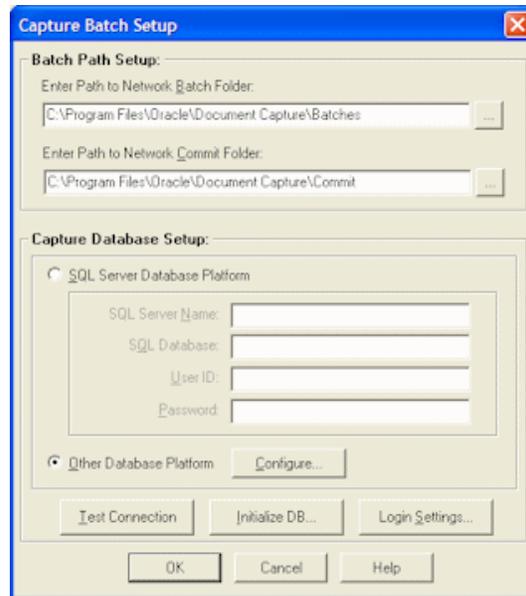
### 13.3 Capture Batch Setup Screen

Use this screen to specify where Capture batches are stored and committed, and to configure and initialize the Capture database.

Element	Description
Enter Path to Network Batch Folder	Enter or select the folder's path. (Capture creates the folder if it doesn't already exist.) Since this folder is the location of the Capture batches, its path must be accessible by all Capture workstations. If the path is on a network, we recommend using a UNC (Universal Naming Convention) Path. However, you can also use a mapped driver letter.

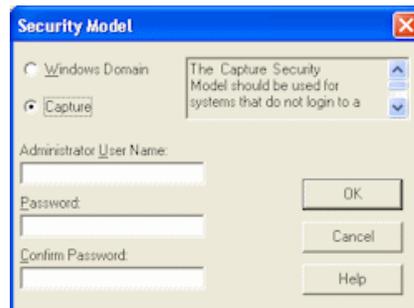
Element	Description
Enter Path to Network Commit Folder	Enter or select the folder's path. (Capture creates the folder if it doesn't already exist.) After a batch has been indexed and committed, the document index information and batch images are moved to this commit folder. This setting specifies the default commit folder for the Commit Text File driver. It is possible to change this path on a per commit profile basis.
Capture Database Setup	Select a database to use for the Capture database. For single user systems, you can configure Capture to use a Microsoft Access database. Otherwise, it is recommended that you configure the Capture database on a client/server database server platform, such as Oracle or Microsoft SQL.
SQL Server Database Platform	Complete the fields to configure a SQL Server database: <ul style="list-style-type: none"> <li>■ In the SQL Server Name field, enter the computer name of the SQL Server.</li> <li>■ In the SQL Database field, enter the name of the SQL database an administrator created.</li> <li>■ In the User ID and Password fields, enter a valid user id and password to communicate to the database server.</li> </ul>
Other Database Platform, Configure	Select this option to configure a Microsoft Access or Oracle database. Click Configure to select and configure an OLE Database Provider to connect to the database.
Test Connection	Click this button to verify that Capture can access the selected database file.
Initialize DB	Click this button to create the table schema within the database.  <b>WARNING:</b> If the Capture database already exists and you are configuring a new Capture workstation, do NOT click the Initialize DB button, since it will destroy all data and recreate the database schema.
Login Settings	Provides user login options for configurations using Windows domain security. This button is disabled when Capture security is selected.

To display this screen, choose **Batch Setup** from the System menu in the Oracle Document Capture screen or from the Setup menu in the server applications.



## 13.4 Security Model Screen

Use this screen to select the type of security you want to use in Capture and to create an administrator if Capture security is selected.

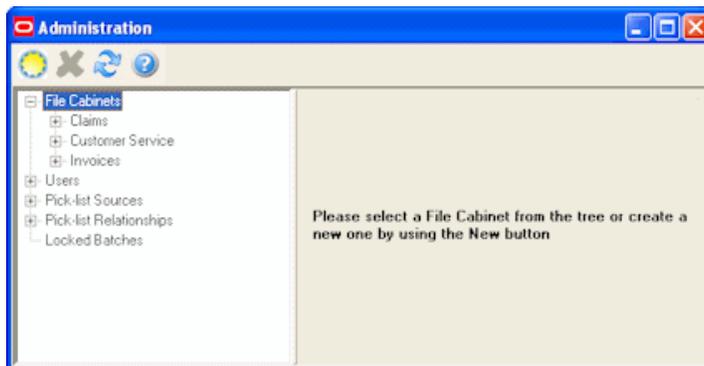


Element	Description
Windows Domain	Choose this model to use the current user's domain or domain group information for login and Capture rights. Depending on settings, users may or may not be required to log in each time they activate Capture. This method allows you to add groups to Capture to quickly assign Capture rights to all members of a domain group.
Capture	Choose this model to maintain individual users and their rights in Capture Administration. Users must log in each time they activate Capture or any of its components.
Administrator User Name, Password	If you selected Capture security, complete these fields to add an administrator for logging into Capture.

This screen is automatically displayed after the database is initialized in the Capture Batch Setup dialog box. You can also display it by initializing the database in the Capture Batch Setup screen (see "[Capture Batch Setup Screen](#)" on page 13-3). However, doing so erases all data in the database and recreates the database schema.

## 13.5 File Cabinets Screen

Use this screen to add, edit, or delete file cabinets. For more information, see "[About File Cabinets](#)" on page 2-1.

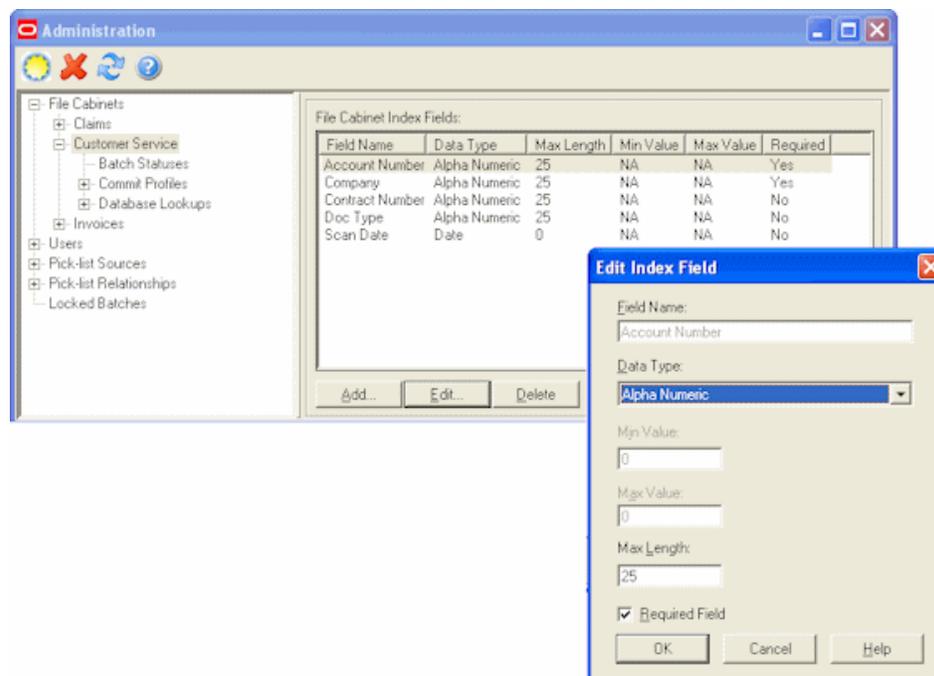


Display this screen by clicking **File Cabinets** from the Admin menu. File cabinets are listed below the File Cabinets heading in the side pane. Click a file cabinet's plus (+) sign to view its associated settings (batch statuses, commit profiles and database lookup profiles). Click a file cabinet to view its index fields.

Element	Description
New	Click the sun button with the File Cabinets heading selected to add a file cabinet, and enter its name.
Delete	Click to delete a selected file cabinet, then confirm the deletion. Deleting a file cabinet makes scan and index profiles and server jobs associated with it unavailable. Deleting also removes all index fields, batch statuses, commit profiles, and database lookup profiles associated with it.  <b>Caution:</b> If batches are assigned to the file cabinet at the time you delete it, the batches and associated images are deleted.
Refresh	Click to refresh a selected file cabinet's contents.

## 13.6 Index Fields Screen

Use this screen to define index fields for the selected file cabinet. For more information, see "[About Index Fields](#)" on page 2-2.



Display this screen by clicking **File Cabinets** from the Admin menu and selecting a file cabinet in the side pane.

Element	Description
Add	Click to add an index field to the file cabinet in the <a href="#">Add/Edit Index Fields Screen</a> .
Edit	Select an index field in the File Cabinet Index Fields list to edit it in the <a href="#">Add/Edit Index Fields Screen</a> .
Delete	Click to delete an index field selected in the File Cabinet Index Fields list. Users can no longer assign index values to deleted index fields.

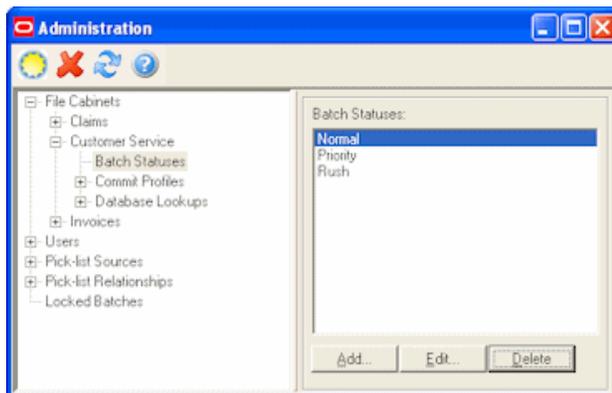
### 13.6.1 Add/Edit Index Fields Screen

Element	Description
Field Name	Enter a descriptive name for the index field. This field may have the same name as an existing field in your content management system.
Data Type	Select the type of data the field will contain. You can choose Alpha Numeric, Numeric, Date or Float.
Min Value, Max Value	Use these fields to specify a range of acceptable numeric values by defining a minimum and/or maximum value. If the user types a number outside this range, the value is not accepted during a document commit. (These fields are available only if Numeric is selected in the Data Type field.)
Max Length	Specify the maximum number of characters a user can enter into this index field. (The default is 25.)

Element	Description
Required Field	<p>Select this field to make the field required. Users must complete all required index fields before a document can be committed.</p> <ul style="list-style-type: none"> <li>If users leave required fields blank in Index, they can move to other fields or images, but when the batch is committed, the image will be left in the batch and not committed.</li> </ul>

## 13.7 Batch Status Screen

Use this screen to define batch statuses for a selected file cabinet. For more information, see ["About Batch Status"](#) on page 2-3.



Display this screen by clicking the **Batch Status** heading in the side pane for a selected file cabinet.

Element	Description
Batch Statuses	Lists batch statuses defined for the file cabinet.
Add	Click to add a batch status by entering its description.
Edit	Click to edit a selected batch status.
Delete	Click to delete a selected batch status, then confirm the deletion. Deleting a batch status makes it unavailable for users to assign to batches within a Capture program. If a status was previously assigned to a batch, it remains, but is no longer available for selecting.

## 13.8 Commit Profiles

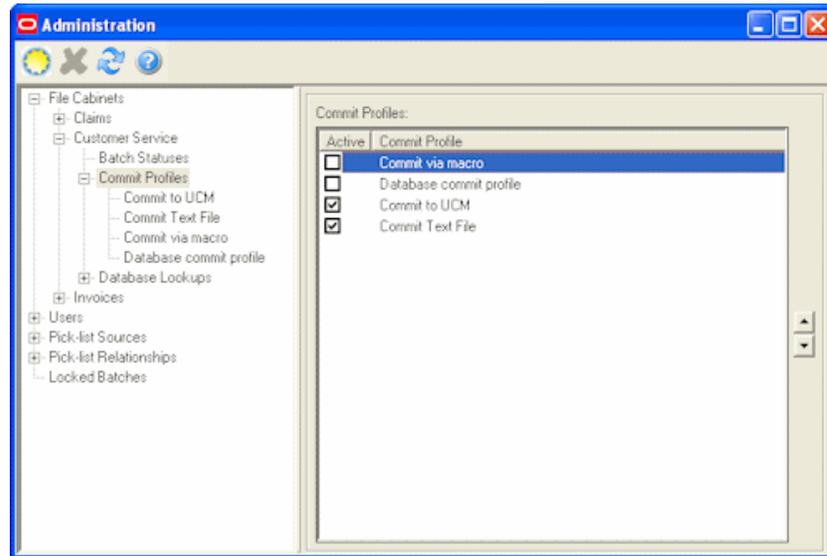
The Commit Profiles option includes the following screens:

- ["Commit Profiles Screen"](#) on page 13-9
- ["Commit Profile Settings Screen"](#) on page 13-9
- ["Oracle UCM 10g Commit Settings Screen"](#) on page 13-13
- ["Oracle UCM 11g Commit Settings Screen"](#) on page 13-19
- ["Oracle I/PM 10g Commit Settings Screen"](#) on page 13-28
- ["Oracle I/PM 11g Commit Settings Screen"](#) on page 13-39

- ["Commit Text File Settings Screen"](#) on page 13-42
- ["Macro Selection Screen"](#) on page 13-46
- ["Database Commit Settings Screen"](#) on page 13-47

### 13.8.1 Commit Profiles Screen

Use this screen to activate or deactivate commit profiles and order their processing.

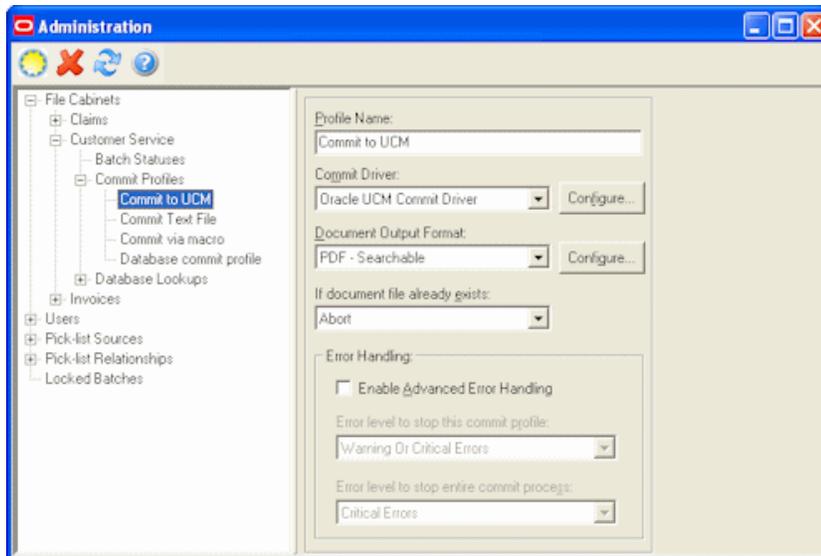


Display this screen by selecting the **Commit Profiles** heading in the side pane for a selected file cabinet.

Element	Description
Active	Select this field to make a commit profile active or inactive for processing. A checkmark indicates an active profile.
Up, Down	Use these arrow buttons to order the commit profiles. Because documents could be committed more than once when using multiple commit profiles, it is recommended that you position the commit profile most likely to fail first.

### 13.8.2 Commit Profile Settings Screen

Use this screen to configure a commit profile, selecting its general settings on this screen and selecting and configuring its commit driver. For more information, see ["About Commit Profiles"](#) on page 2-7.



Display this screen by selecting a commit profile under the **Commit Profiles** heading in the side pane for a selected file cabinet. Add a commit profile by clicking the **New** (sun) button with a commit profile selected.

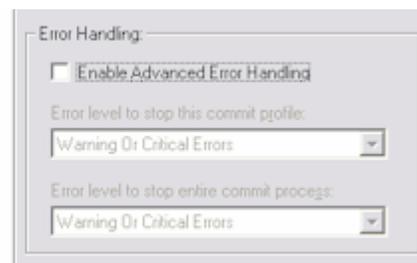
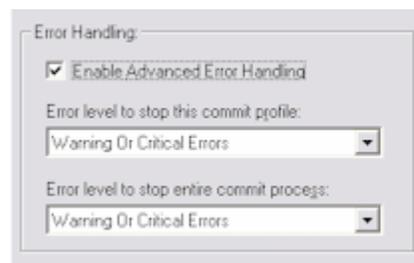
Element	Description
Profile Name	Displays the profile's name, which you can change.
Commit Driver, Configure	Specify the method by which you want documents committed. Click <b>Configure</b> to select driver settings. Depending on installation, drivers may include: <ul style="list-style-type: none"> <li>■ <b>Oracle UCM Commit Driver</b>, which commits documents directly into Oracle UCM. For more information, see <a href="#">"About the Oracle UCM 10g Commit Driver"</a> on page 2-9.</li> <li>■ <b>Oracle UCM 11g Commit Driver</b>, which commits documents directly into Oracle UCM 11g. For more information, see <a href="#">"About the Oracle UCM 11g Commit Driver"</a> on page 2-10.</li> <li>■ <b>Oracle I/PM Commit Driver</b>, which commits documents into Oracle I/PM. For more information, see <a href="#">"About the Oracle I/PM 10g Commit Driver"</a> on page 2-11.</li> <li>■ <b>Oracle I/PM 11g Commit Driver</b>, which commits documents into Oracle I/PM 11g. For more information, see <a href="#">"About the Oracle I/PM 11g Commit Driver"</a> on page 2-12.</li> <li>■ <b>Commit Text File</b>, which writes a text file containing data about the committed images, such as index field values and batch information. For more information, see <a href="#">"About the Text File Commit Driver"</a> on page 2-14.</li> <li>■ <b>Electronic Document Provider</b>, which uses a specified EDP macro to determine how documents are committed. For more information, see <a href="#">"About the Electronic Document Provider Commit Driver"</a> on page 2-14.</li> <li>■ <b>Database Commit Driver</b>, which commits Capture documents to a database. Document files may be stored in a file whose path is stored in the database or to a database table, storing them in an image/blob field. For more information, see <a href="#">"About the Database Commit Driver"</a> on page 2-15.</li> </ul>

Element	Description
Document Output Format, Configure	<p>Specify the format in which you want documents committed using this profile output. Click Configure to select export settings for the selected output format. By default, document images are committed in their native format. To convert them, choose a new format:</p> <ul style="list-style-type: none"> <li>Native Format: No conversion takes place.</li> <li>Single Page TIFF: Converts black/white, grayscale and color images to Group 4 TIFF format.</li> <li>Multi Page TIFF: Converts documents to multiple page, Group 4 TIFF format.</li> <li>PDF (Image Only): Converts documents to PDF (portable document format).</li> <li>PDF (Searchable): Converts documents to PDF (portable document format) with text users can search. (Available for Oracle Document Capture only.)</li> </ul>
If document file already exists	<p>Specify what happens if a document file being committed already exists. You can choose Overwrite, Abort (default) or Append.</p> <p><b>Note:</b> The Append option is available only when Multi Page TIFF or PDF (Image Only) is selected in the Document Output Format field. Not all commit drivers support document appending functionality.</p> <p>If the document file already exists and the option is set to Abort, Capture stops committing the document and generates an error with the message, <i>Document file [full path to file] already exists, document commit has been aborted.</i></p>
Error Handling	<p>Select the <b>Enable Advanced Error Handling</b> field to activate custom error handling according to the level you choose from its two options. For more information, see "<a href="#">About Commit Error Handling</a>" on page 2-9 and "<a href="#">Error Handling Examples</a>" on page 13-11. It is recommended that you not enable this setting.</p>

### 13.8.2.1 Error Handling Examples

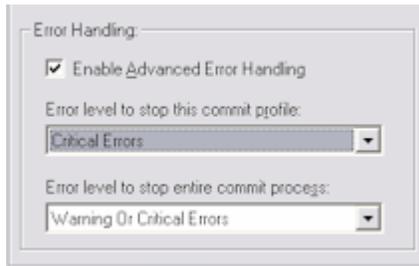
Below are examples of how error levels control the commit process if errors are encountered:

- If a warning or critical error occurs, cancel the commit process: To immediately cancel the commit process in the case of any error, set the error level for both the commit profile and the commit process to Warning or Critical Errors. Note that this is the default option, whether advanced error handling is activated or not.

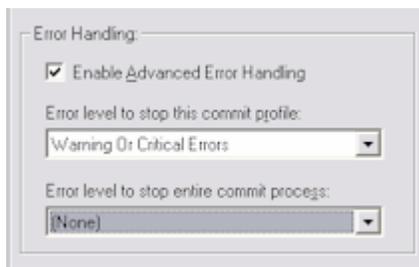


- If a warning error occurs, continue with the commit profile: In this case, the commit profile's error level is set to Critical Errors. If a Warning error occurs, the

document in which the error occurred is skipped, and the commit process proceeds to the next document for the commit profile.

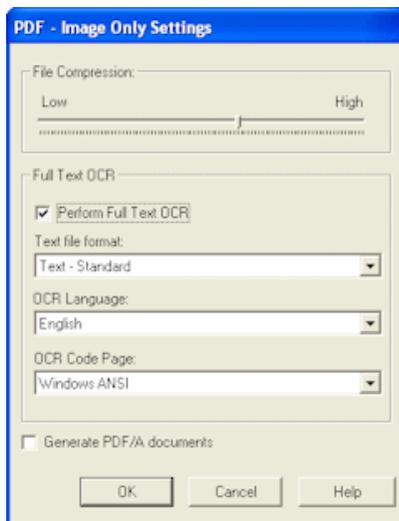


- If a warning or critical error occurs, cancel the current commit profile but proceed using the next commit profile: Setting the commit process error level to None means that, regardless of the error, Capture proceeds to the next commit profile.



### 13.8.2.2 Document Output Format Settings Screen

Use this screen to select output format settings. For example, you may choose to automatically generate a text file of a selected format containing all text found in documents via Optical Character Recognition (OCR). Depending on the capabilities of your content management system, the full text file can be used for document searching and retrieval.



Display this screen by clicking the **Configure** button adjacent to the Document Output Format field on the [Commit Profile Settings Screen](#). The settings displayed depend on the output format selected.

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**Note:** The Full Text OCR options apply to Oracle Document Capture, but not Oracle Distributed Document Capture.

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Element	Description
Perform Full Text OCR	<p>Select this field to create a text file along with the selected output file that contains all text captured during the full-page OCR process. The text file is named with the same name as the output file, except for a .TXT extension.</p> <p><b>Note:</b> The commit drivers included with Capture do not utilize the Full Text OCR file. This file is intended for use with a custom EDP macro. To facilitate full-text documents in Oracle I/PM and Oracle UCM, use the PDF (Searchable) document output format.</p>
Text file format	<p>Select a format for the OCR text file. The available options are:</p> <ul style="list-style-type: none"> <li>■ (None) No text file will be created. (This is the default setting.)</li> <li>■ Text - Standard</li> <li>■ Text - Smart</li> <li>■ Text - Stripped</li> <li>■ Text - Plain</li> <li>■ Text - Comma Delimited</li> <li>■ Text - Tab Delimited</li> <li>■ Rec ASCII (Formatted)</li> <li>■ Rec ASCII (Standard)</li> <li>■ Rec ASCII (StandardEx)</li> </ul>
OCR Language	Select the language in which you want the OCR text file created.
OCR Code Page	Select the character set to be used for storing OCR text.
File Compression	Specify a file compression and image quality setting for images. This option is available only when PDF (Image Only) is selected as the output format. You can specify a number from 1 to 100, where 65 is the default. Note that the higher the file compression and image quality setting, the larger the image file size.
Generate PDF/A documents	Select this field to generate PDF/A compliant PDF files. (This option is available only when <b>PDF-Image Only</b> is selected in the commit profile's Document Output Format field.)
Optional text file format	This option is available only when PDF (Searchable) is selected as the output format and is available for Oracle Document Capture only. To create a text file along with the PDF (Searchable) output file that contains all text captured during the OCR process, choose Text - Standard. The text file is named with the same name as the output file, except for a .TXT extension. Selecting <i>(None) No text file will be created</i> skips creating the text file.

### 13.8.3 Oracle UCM 10g Commit Settings Screen

Use this screen to configure an Oracle UCM commit profile, which commits documents directly into Oracle UCM. Display this screen by creating a commit profile,

selecting Oracle UCM Commit Driver in the Commit Driver field and clicking Configure to configure driver settings. Select settings on these tabs:

- "Oracle UCM Commit Settings Screen, Login Tab" on page 13-14
- "Oracle UCM Commit Settings Screen, Check-In Tab" on page 13-15
- "Oracle UCM Commit Settings Screen, Add Metadata Mappings" on page 13-16
- "Oracle UCM Commit Settings Screen, Title Builder" on page 13-17
- "Oracle UCM Commit Settings, Field Mappings Tab" on page 13-18

### 13.8.3.1 Oracle UCM Commit Settings Screen, Login Tab

Use the Login tab to specify Oracle UCM login information. When the user commits in Capture with the Oracle UCM commit driver active, Capture will commit to Oracle UCM.

Element	Description
User Name	Enter ID for accessing the UCM Content Server.
Password	Enter password for accessing the UCM Content Server.
Server URL	Enter the URL of the UCM Content Server to which to commit.
Login	Click this button. Capture logs into Oracle UCM to authenticate the user. After a successful login, the Check-In and Field Mappings tabs become available.

### 13.8.3.2 Oracle UCM Commit Settings Screen, Check-In Tab

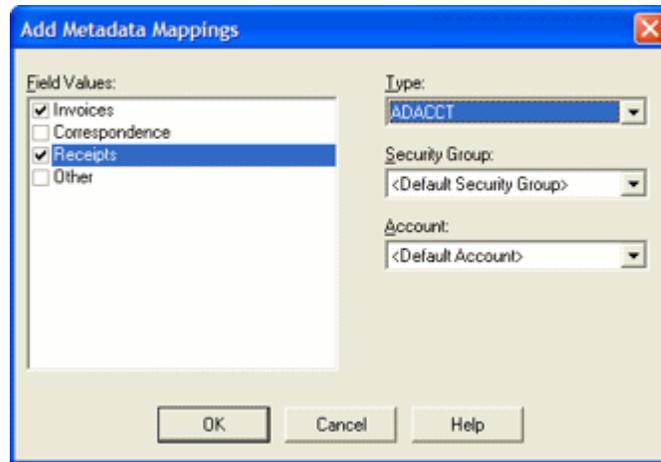
Use the Check-In tab to specify where documents will be visible in Oracle UCM, how they will be named, and who can view and access them.

Element	Description
Document Title	Specify how you want the committed documents named in Oracle UCM. Also see " <a href="#">Oracle UCM Commit Settings Screen, Title Builder</a> " on page 13-17.
Default Type	Select the Oracle UCM category to which you want the documents committed. For example, you might choose from departments such as Accounting, Human Resources or Manufacturing.  If assigning metadata values dynamically, this field's value is used if the Type field is not mapped or <Default Type> is selected in metadata mapping.
Default Security Group	Select the security group to which to allow access to documents committed using this commit driver. Only users with permission to the selected security group will be able to work with these content items.  If assigning metadata values dynamically, this field's value is used if the Security Group field is not mapped or <Default Security Group> is selected in metadata mapping.

Element	Description
Default Account	Select the account (if specified) to which to allow access to documents committed using this commit driver. Only users with permission to the selected account will be able to work with these content items.  If assigning metadata values dynamically, this field's value is used if the Account field is not mapped or <Default Account> is selected in metadata mapping.
Bypass Workflows	Select this field to directly check in documents committed using this profile, bypassing any workflow processing.
Assign values dynamically	Select this field to assign type, security, and account values dynamically based on a Capture field value or a Capture user's pick-list selection.
By Field Mappings	Select this option to assign values based on Capture field values. See " <a href="#">Oracle UCM Commit Settings, Field Mappings Tab</a> " on page 13-18.
By Index Field	Select this option to assign values based on a pick-list value a Capture user selects. Select the Capture field whose pick-list value assigns type, security group, and account.
Pick-list Source	Select the source of the pick-list to be used to dynamically assign metadata values. You can choose Capture Native Pick-list or a previously created database pick-list.
Pick-list	Select the pick-list from those available for the source you selected.
Add	Click to add a dynamic metadata mapping. The Add Metadata Mappings screen displays; see " <a href="#">Oracle UCM Commit Settings Screen, Add Metadata Mappings</a> " on page 13-16.
Edit	Click to edit a selected dynamic metadata mapping in the table. To assign the same Type, Security Group, or Account values to multiple mappings, hold down the Ctrl key and select them, click Edit and select new values.
Delete	Click to delete a selected dynamic metadata mapping in the table.

### 13.8.3.3 Oracle UCM Commit Settings Screen, Add Metadata Mappings

Use this screen to configure Capture to dynamically assign a type, security group, and account based on a pick-list value. For example, if a user selects a value of Invoice from a pick-list while indexing, the document might be assigned a combination of three values (ACCTG for Type field, Finance for Security Group, and <No Account> for Account). Use this screen to set up Type, Security Group, and Account value mappings for listed pick-list field values. As you add them, they are added to the table on the Check-In tab.

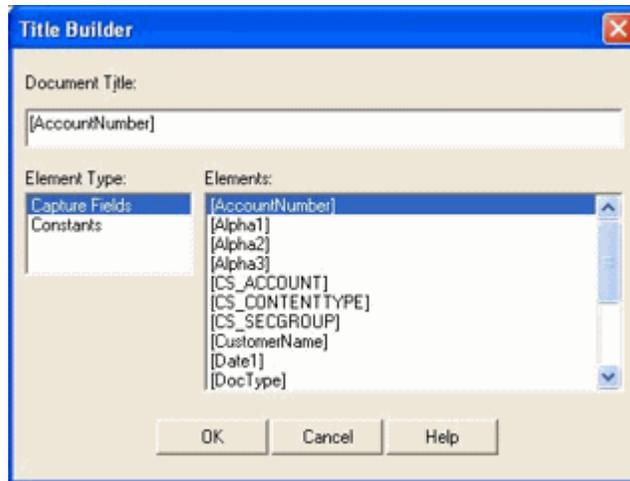


Display this screen by selecting dynamic metadata settings on the Check-In tab of the [Oracle UCM 10g Commit Settings Screen](#) and clicking **Add**.

Element	Description
Field Values	Lists values in the pick-list not already mapped. Select one or more field values.
Type	<p>Select a type for the selected field values. For example, if the document type is Invoices or Receipts, the Type might be Accounting.</p> <p>If you select &lt;Default Type&gt;, the value shown in the Default Type field on the Check-In tab will be used. This makes it easy to change the default for many mappings by changing the default value on the Check-In tab.</p> <p>The Type, Security Group, and Account fields each contain a default option (as in &lt;Default Security Group&gt;). If &lt;Default Security Group&gt; is selected, the value shown in the Default Security Group field on the Check-In tab is used.</p>
Security Group	<p>Choose a group for the selected field values.</p> <p>If you select &lt;Default Security Group&gt;, the value shown in the Default Security Group field on the Check-In tab will be used. This makes it easy to change the default for many mappings by changing the default value on the Check-In tab.</p>
Account	<p>Select an account for the selected field values. If you select &lt;Default Account&gt;, the value shown in the Default Account field on the Check-In tab will be used. This makes it easy to change the default for many mappings by changing the default value on the Check-In tab.</p>

#### 13.8.3.4 Oracle UCM Commit Settings Screen, Title Builder

Use this screen to specify how you want the committed documents named in Oracle UCM.



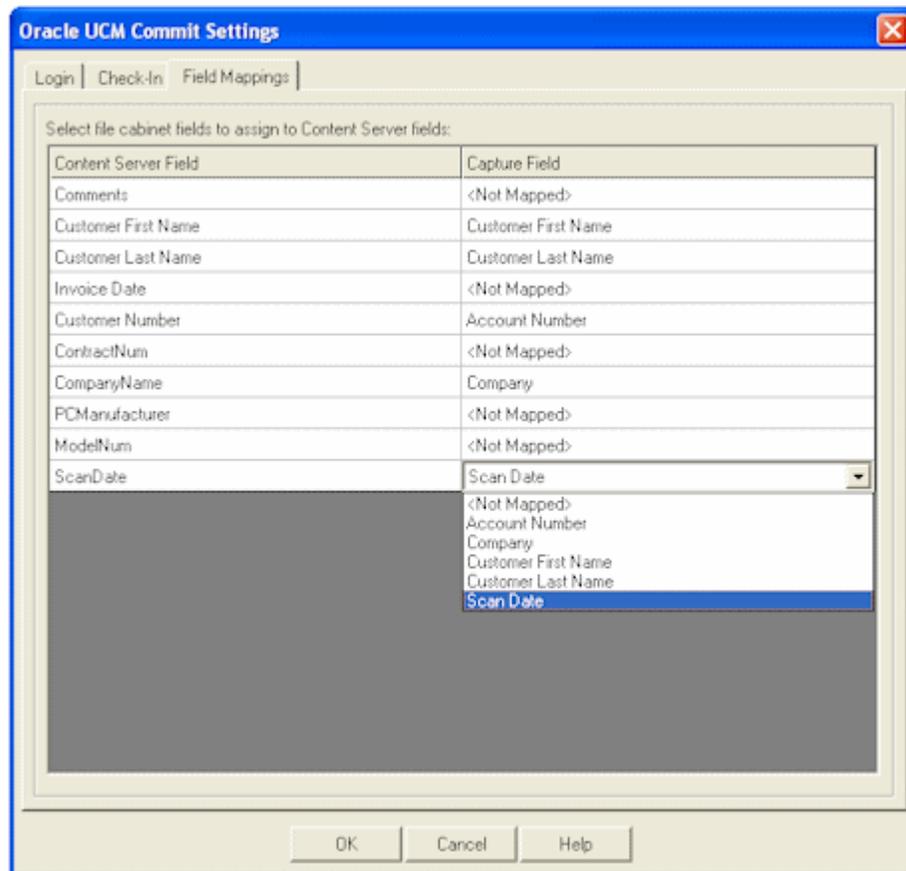
Display this screen by clicking the **Browse** button adjacent to the **Document Title** field on the Check-In tab of the [Oracle UCM 10g Commit Settings Screen](#).

Element	Description
Document Title	Build the title in this field. You can include the following elements: <ul style="list-style-type: none"> <li>Literal characters: Enter alphanumeric characters in the Document Title field.</li> <li>Capture fields</li> <li>Constants (spaces or dashes)</li> </ul>
Element Type	Select the type of element you want to add to the document title. Choose <b>Capture Fields</b> to add a Capture index field from those available in the profile's file cabinet. Choose <b>Constants</b> to add a dash or space.
Elements	Double-click a Capture field or constant to add it to the document title.

### 13.8.3.5 Oracle UCM Commit Settings, Field Mappings Tab

Use the Field Mappings tab to map Capture index fields to Oracle Content Server fields. As documents are committed using this driver, values entered in Capture will be written into the specified Content Server fields for document retrieval.

When **By Field Mappings** is selected on the Check-In tab, the following additional fields are displayed in the Content Server Field column: <Account>, <Content Type>, and <Security Group>. Mapping these fields allows metadata values to be dynamically assigned at commit, based on these Capture field values at commit.



Element	Description
Content Server Fields	Lists all available Content Server fields.
Capture Fields	Select an index field from those listed for the file cabinet to map to the adjacent Content Server field.

### 13.8.4 Oracle UCM 11g Commit Settings Screen

Use this screen to configure an Oracle UCM 11g commit profile, which commits documents directly into Oracle UCM.

Display this screen by creating a commit profile, selecting **Oracle UCM 11g Commit Driver** in the Commit Driver field, and clicking **Configure** to configure driver settings.

Select settings on these tabs and screens:

- ["Oracle UCM 11g Commit Settings Screen, Login Tab"](#) on page 13-20
- ["Oracle UCM 11g Commit Settings Screen, Check-In Tab"](#) on page 13-20
- ["Oracle UCM 11g Commit Settings Screen, Add Metadata Mappings"](#) on page 13-22
- ["Oracle UCM 11g Commit Settings Screen, Title Builder"](#) on page 13-23
- ["Oracle UCM 11g Commit Settings Screen, Field Mappings Tab"](#) on page 13-24
- ["Oracle UCM 11g Commit Settings Screen, Add/Edit Custom Fields"](#) on page 13-25
- ["Oracle UCM 11g Commit Settings Screen, Options Tab"](#) on page 13-26

### 13.8.4.1 Oracle UCM 11g Commit Settings Screen, Login Tab

Use the Login tab to specify Oracle UCM login information. When the user commits in Capture with the Oracle UCM commit driver active, Capture commits to Oracle UCM.

To display this screen, open a commit profile in Capture Administration, select **Oracle UCM 11g Commit Driver** in the Commit Driver field, and click the adjacent Configure button.

Element	Description
User Name	Enter an ID for accessing the Oracle UCM Content Server. This field is case sensitive.
Password	Enter a password for accessing the Oracle UCM Content Server. This field is case sensitive.
Server URL	Enter the URL of the Oracle UCM Content Server in which to commit. For example: <code>http://svr-ucm/idc/idcplg</code>
Login	Click this button to log Capture into Oracle UCM and authenticate the user. After a successful login, the other tabs become available.

### 13.8.4.2 Oracle UCM 11g Commit Settings Screen, Check-In Tab

Use the Check-In tab to specify where documents are visible in Oracle UCM, how they are named in Oracle UCM, and who can view and access them.

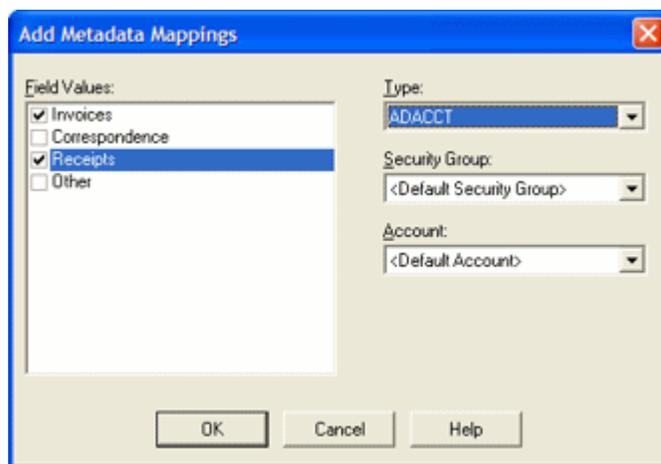
To display this screen, open a commit profile in Capture Administration, select **Oracle UCM 11g Commit Driver** in the Commit Driver field, click the adjacent Configure button, and click the Check-In tab.

Element	Description
Document Title	Specify how to name committed documents in Oracle UCM. Click the adjacent Browse button and specify the title in the Title Builder screen, as described in <a href="#">"Oracle UCM 11g Commit Settings Screen, Title Builder"</a> on page 13-23.
Default Type	Select the Oracle UCM category in which to commit documents. For example, you might choose Document.  If assigning metadata values dynamically, this field's value is used if the Type field is not mapped or <Default Type> is selected in metadata mapping.
Default Security Group	Select a security group for documents committed using this commit driver. Only users with permission to the selected security group can work with these content items.  If assigning metadata values dynamically, this field's value is used if the Security Group field is not mapped or <Default Security Group> is selected in metadata mapping.
Default Account	Select an account (if specified) for documents committed using this commit driver. Only users with permission to the selected account can work with these content items.  If assigning metadata values dynamically, this field's value is used if the Account field is not mapped or <Default Account> is selected in metadata mapping.

Element	Description
Assign values dynamically	Select this field to dynamically assign type, security, and account values based on a Capture field value or a Capture user's pick-list selection.
By Field Mappings	Select this option to assign values based on Capture field values. See <a href="#">"Oracle UCM 11g Commit Settings Screen, Field Mappings Tab"</a> on page 13-24.
By Index Field	Select this option to assign values based on a pick-list value a Capture user selects. Select the Capture field whose pick-list value assigns type, security group, and account.
Pick-list Source	Select the source of the pick-list to be used to dynamically assign metadata values. You can choose <b>Capture Native Pick-list</b> or a previously created database pick-list.
Pick-list	Select the pick-list from those available for the selected source.
Add	Click to add a dynamic metadata mapping. The Add Metadata Mappings screen is displayed. See <a href="#">"Oracle UCM 11g Commit Settings Screen, Add Metadata Mappings"</a> on page 13-22.
Edit	Click to edit a selected dynamic metadata mapping in the table. To assign the same Type, Security Group, or Account values to multiple mappings, hold down the Ctrl key and select them, click Edit, and select new values.
Delete	Click to delete a selected dynamic metadata mapping in the table.

### 13.8.4.3 Oracle UCM 11g Commit Settings Screen, Add Metadata Mappings

Use this screen to configure Capture to dynamically assign a type, security group, and account based on a pick-list value. For example, if a user selects a value of Invoice from a pick-list while indexing, the document might be assigned a combination of three values (ACCTG for Type field, Finance for Security Group, and <No Account> for Account). Use this screen to set up Type, Security Group, and Account value mappings for listed pick-list field values. As you add them, they are added to the table on the Check-In tab.

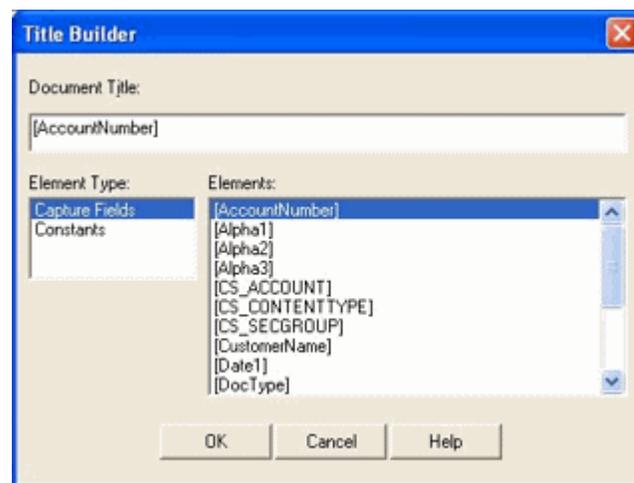


Display this screen by clicking **Add** in the [Oracle UCM 11g Commit Settings Screen, Check-In Tab](#).

Element	Description
Field Values	Lists values in the pick-list not already mapped. Select one or more field values.
Type	<p>Select a type for the selected field values. For example, if the document type is Invoices or Receipts, the Type might be Accounting.</p> <p>If you select &lt;Default Type&gt;, the value shown in the Default Type field on the Check-In tab is used. This makes it easy to change the default for many mappings by changing the default value on the Check-In tab.</p> <p>The Type, Security Group, and Account fields each contain a default option (as in &lt;Default Security Group&gt;). If &lt;Default Security Group&gt; is selected, the value shown in the Default Security Group field on the Check-In tab is used.</p>
Security Group	<p>Choose a group for the selected field values.</p> <p>If you select &lt;Default Security Group&gt;, the value shown in the Default Security Group field on the Check-In tab is used. This makes it easy to change the default for many mappings by changing the default value on the Check-In tab.</p>
Account	<p>Select an account for the selected field values. If you select &lt;Default Account&gt;, the value shown in the Default Account field on the Check-In tab is used. This makes it easy to change the default for many mappings by changing the default value on the Check-In tab.</p>

#### 13.8.4.4 Oracle UCM 11g Commit Settings Screen, Title Builder

Use this screen to specify how documents are named, either in Oracle UCM or as document files.



Display this screen in one of two ways:

- By clicking the Browse button adjacent to the Document Title field on the [Oracle UCM 11g Commit Settings Screen, Check-In Tab](#).
- By clicking the Browse button adjacent to the Document File Name field on the [Oracle UCM 11g Commit Settings Screen, Options Tab](#).

Element	Description
Document Title	Build the title in this field. You can include the following elements: <ul style="list-style-type: none"><li>▪ Literal characters: Enter alphanumeric characters in the Document Title field.</li><li>▪ Capture fields</li><li>▪ Constants (spaces or dashes)</li></ul>
Element Type	Select the type of element you want to add to the document name. Choose <b>Capture Fields</b> to add a Capture index field from those available in the profile's file cabinet. Choose <b>Constants</b> to add a dash or space.
Elements	Double-click a Capture field or constant to add it to the document name.

#### 13.8.4.5 Oracle UCM 11g Commit Settings Screen, Field Mappings Tab

Use the Field Mappings tab to map Capture index fields to Oracle Content Server fields. As documents are committed using this driver, values entered in Capture are written into the specified Content Server fields for document retrieval.

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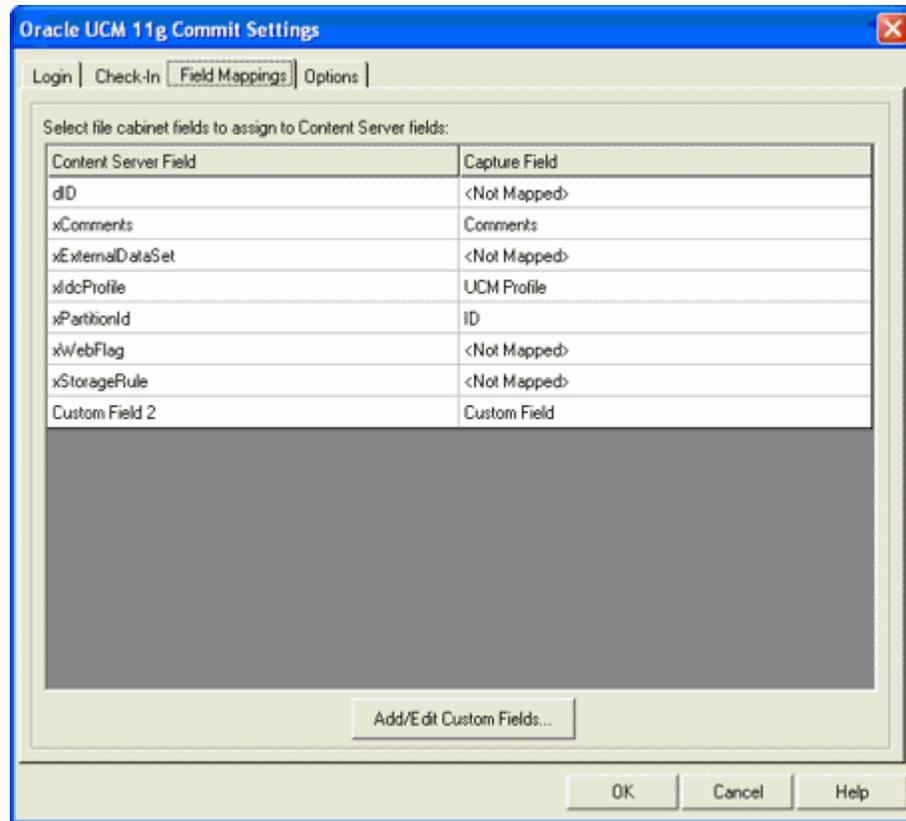
**Note:** When **By Field Mappings** is selected on the Check-In tab, the following additional fields are displayed in the Content Server Field column:

- <Account>
- <Content Type>
- <Security Group>

Mapping these fields allows metadata values to be dynamically assigned at commit, based on these Capture field values.

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To display this screen, open a commit profile in Capture Administration, select **Oracle UCM 11g Commit Driver** in the Commit Driver field, click the adjacent Configure button, and click the Field Mappings tab.

Element	Description
Content Server Fields	Lists all available Content Server fields.
Capture Fields	Select an index field from those listed for the file cabinet to map to the adjacent Content Server field.
Add/Edit Custom Fields	Click this button to add, edit, or delete custom Content Server fields for mapping to Capture fields.

#### 13.8.4.6 Oracle UCM 11g Commit Settings Screen, Add/Edit Custom Fields

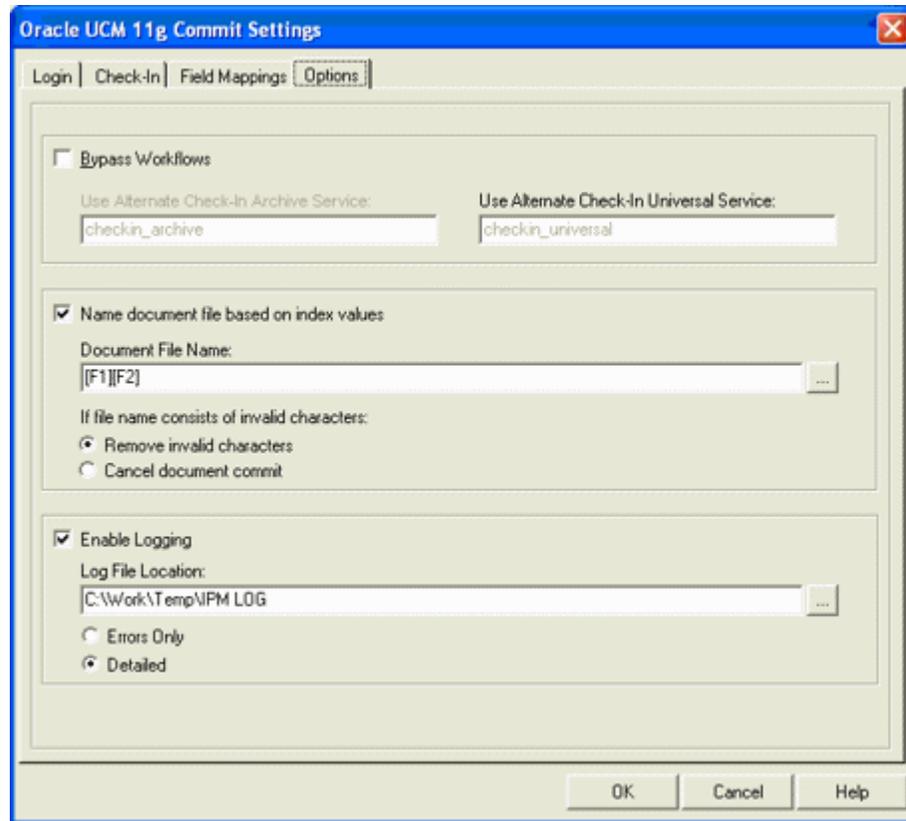
Use this screen to add, edit, or delete custom Content Server fields and descriptions. You might add custom fields, for example, when you have custom code running on the Content Server that specifically references these fields. (Without custom code, these custom fields are ignored.) After you add one or more custom fields in this screen, they become available for mapping on the Field Mappings tab.

Display this screen by clicking the **Add/Edit Custom Fields** button on the [Oracle UCM 11g Commit Settings Screen, Field Mappings Tab](#).

Element	Description
Field Name	Enter the name of a custom field to add. The name must match the custom code that references it.
Field Caption	Specify a description of the custom field.
Add	Click to add the specified custom Content Server field.
Edit	Click to save changes to the selected Content Server field.
Delete	Click to delete the selected Content Server custom field. Any Capture fields previously mapped to a deleted custom field are no longer mapped.

#### 13.8.4.7 Oracle UCM 11g Commit Settings Screen, Options Tab

Use the Options tab to customize the document check-in process.



To display this screen, open a commit profile in Capture Administration, select **Oracle UCM 11g Commit Driver** in the Commit Driver field, click the adjacent Configure button, and click the Options tab.

Element	Description
Bypass Workflows	<p>Select this field to directly check in documents committed using this profile, bypassing any workflow processing.</p> <ul style="list-style-type: none"> <li>When this field is <i>selected</i>, check-in is performed by the CHECKIN_ARCHIVE service, unless a custom service is specified in the <b>Use Alternate Check-In Archive Service</b> field, in which case it is used instead.</li> <li>When this field is <i>not selected</i> (default), check-in is performed by the CHECKIN_UNIVERSAL service, unless a custom service is specified in the <b>Use Alternate Check-In Universal Service</b> field, in which case it is used instead.</li> </ul>
Use Alternate Check-In Archive Service	Specify a custom archive service to check in documents to Oracle UCM instead of the default CHECKIN_ARCHIVE service. This field is available when <b>Bypass Workflows</b> is selected.
Use Alternate Check-In Universal Service	Specify a custom check-in service to check in documents to Oracle UCM instead of the default CHECKIN_UNIVERSAL service. This field is available when <b>Bypass Workflows</b> is not selected.

Element	Description
Name document file based on index values	<p>Select this field to name document files using selected Capture index fields specified in the <b>Document File Name</b> field and options shown on this tab. (You can also include literal characters by typing alphanumeric characters in this field, or separate words or index values by typing a space or dash.)</p> <p>If this field is deselected, document files retain the names assigned by Capture, which consists of a default naming scheme that combines the internal batch ID, an underscore, and a numeric identifier.</p> <p>Note that this setting defines how <i>output files are named</i>; the <b>Document Title</b> field on the <a href="#">Oracle UCM 11g Commit Settings Screen, Check-In Tab</a> defines how documents are <i>titled in Oracle UCM</i>.</p> <p><b>Note:</b> This setting applies to Multi-page TIFF and PDF output formats only, and is grayed out if another format is selected.</p>
Document File Name	Specify how you want the committed document files named. Click the adjacent Browse button and specify the title in the Title Builder screen, as described in " <a href="#">Oracle UCM 11g Commit Settings Screen, Title Builder</a> " on page 13-23.
If file name consists of invalid characters	Specify what happens if Capture detects invalid characters in a file name. This might occur, for example, if a user entered an index value containing a question mark or a slash character. You can choose to either remove the invalid characters or cancel the document commit.
Enable Logging	Select this field to activate logging for the commit profile. One log file per day is created. The filename uses the format UCMyymmdd.log.
Log File Location	Specify a folder in which to store log files as they are created.
Errors Only/Detailed	Select <b>Errors Only</b> to write to the log only if an error occurs. Select <b>Detailed</b> to log all related actions.

### 13.8.5 Oracle I/PM 10g Commit Settings Screen

Use this screen to configure an Oracle I/PM commit profile, which commits documents directly into Oracle I/PM.

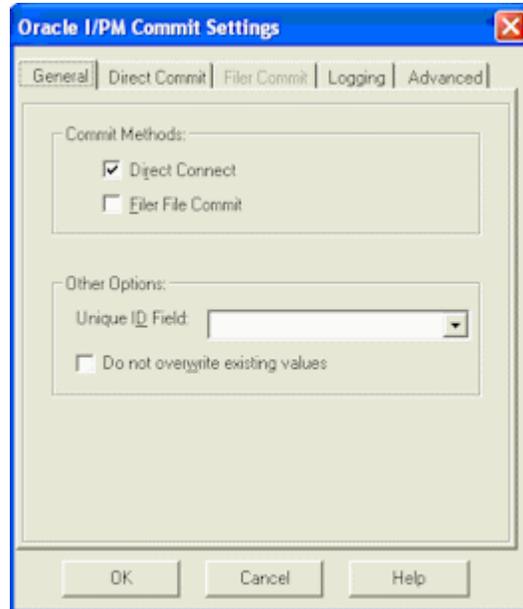
Display this screen by creating a commit profile, selecting Oracle I/PM Commit Driver in the Commit Driver field and clicking Configure to configure driver settings. Select settings on these tabs and dialog boxes:

- "[Oracle I/PM Commit Settings Screen, General Tab](#)" on page 13-29
- "[Oracle I/PM Commit Settings Screen, Direct Commit Tab](#)" on page 13-30
- "[Oracle I/PM Commit Settings Screen, Direct Commit Tab, Field Mappings](#)" on page 13-30
- "[Oracle I/PM Commit Settings Screen, Process Setup](#)" on page 13-31
- "[Process Setup Screen, General Settings Tab](#)" on page 13-32
- "[Process Setup Screen, Batch Filter Properties Tab](#)" on page 13-33
- "[Process Setup Screen, Process Properties Tab](#)" on page 13-34
- "[Process Setup Screen, Field Mappings Tab](#)" on page 13-36
- "[Oracle I/PM Commit Settings Screen, Filer Commit Tab](#)" on page 13-36

- "Oracle I/PM Commit Settings Screen, Logging Tab" on page 13-37
- "Oracle I/PM Commit Settings Screen, Advanced Tab" on page 13-38

### 13.8.5.1 Oracle I/PM Commit Settings Screen, General Tab

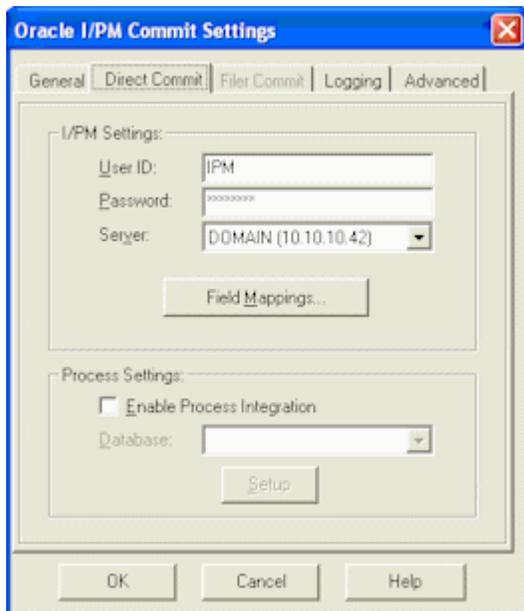
Use this tab to select general settings for the I/PM commit profile.



Element	Description
Commit Method	<p>Specify how you want documents archived.</p> <ul style="list-style-type: none"> <li>■ Choose the Direct Connect method to archive documents directly into Oracle I/PM. (You can choose both methods. Doing so allows you to keep a backup of the document indexes and images in the format of an I/PM Filer file.)</li> <li>■ Choose the Filer File Commit method to create an I/PM Filer file for each committed batch.</li> </ul> <p>You can choose both methods. Doing so allows you to keep a backup of the document indexes and images in the format of an I/PM Filer file.</p>
Unique ID Field	<p>This field allows you to select a file cabinet field whose value will be replaced at commit time with a unique value. The unique value is in the form of: Capture Batch ID + the numeric file extension of the first page in the document + the number of seconds past midnight. A new unique value is generated for each document within the batch.</p> <p><b>Note:</b> This value is unique to a Capture database.</p> <p><b>Note:</b> This field must also be mapped to an I/PM application field within the Index Field Mappings dialog box (or have the same name) in order for it to be written into Oracle I/PM.</p>
Do not overwrite existing values	<p>If this field is selected, the specified Unique ID will retain any value that was populated by a user or Index macro. If deselected (default), the Unique ID field will be auto-populated regardless of any value already in the field.</p>

### 13.8.5.2 Oracle I/PM Commit Settings Screen, Direct Commit Tab

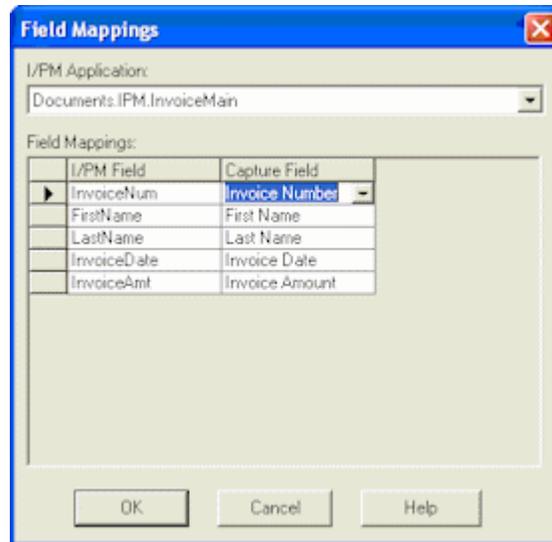
Use this tab to select direct commit options, including field mappings and process integration. Note that this tab is available when Direct Connect is selected on the General tab (see "Oracle I/PM Commit Settings Screen, General Tab" on page 13-29).



Element	Description
User ID, Password, Server	Enter a valid I/PM User ID, Password (case sensitive) and Server to use when archiving documents into Oracle I/PM. The account you specify must have Create Index rights to any applications being used.
Field Mappings	Click to associate Capture file cabinet fields with I/PM application fields. By default, the Oracle I/PM commit driver commits documents into an I/PM application based on the name of the respective Capture file cabinet. For more information, see "Oracle I/PM Commit Settings Screen, Direct Commit Tab, Field Mappings" on page 13-30.
Enable Process Integration	Select this field to enable the Process functionality. <b>Note:</b> You must have Process administrator rights. The user account is used exclusively by the Process integration as a service account to create and append Process packages.
Database	Specify a Process database.
Setup	Click to specify detailed Process configurations.

### 13.8.5.3 Oracle I/PM Commit Settings Screen, Direct Commit Tab, Field Mappings

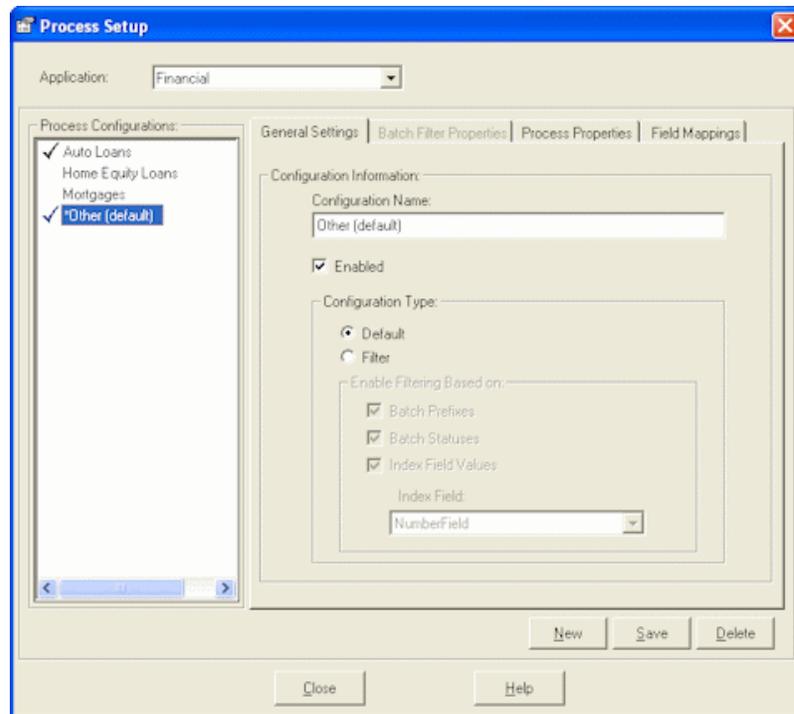
Use this dialog box to map a Capture file cabinet to an Oracle I/PM application. This dialog box is displayed when you click the Field Mappings button on the Direct Commit tab of the Oracle I/PM Commit Settings dialog box.



Element	Description
I/PM Application	Select the I/PM application you want to map.
I/PM Field	Lists fields in the selected I/PM application.
Capture Field	Select Capture fields to map to the I/PM fields.

#### 13.8.5.4 Oracle I/PM Commit Settings Screen, Process Setup

Use this screen to set up a Process configuration.



Display this screen by checking the **Enable Process Integration** field on the Direct Commit tab in the Oracle I/PM Commit Settings screen, then clicking **Setup**. See ["Oracle I/PM Commit Settings Screen, Direct Commit Tab"](#) on page 13-30.

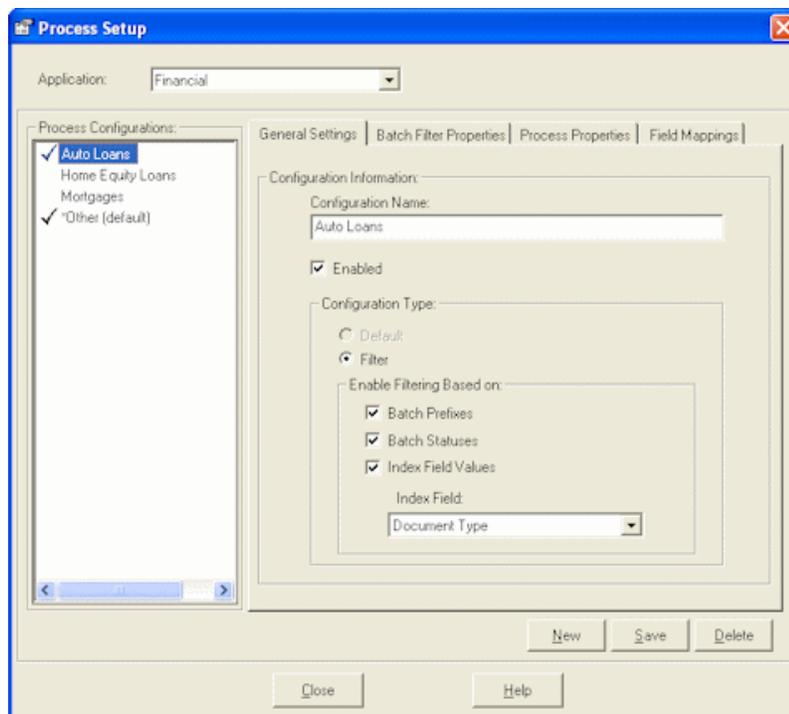
Element	Description
Application	Select another I/PM application, if needed.
Process Configurations	Lists Process configurations for the selected Oracle I/PM application. A check mark indicates that the configuration is enabled. An asterisk identifies the default configuration.
New	Click to create a configuration. Each document is processed by the first Process configuration whose filter criteria it matches. Be sure to create configurations that do not conflict. If a document can be matched by more than one configuration, Capture cannot control which configuration will be used.
Save	Click to save changes made to the selected configuration.
Delete	Click to delete the selected configuration. Deleting a configuration means it is no longer available for processing documents.

This screen includes the following tabs:

- ["Process Setup Screen, General Settings Tab"](#) on page 13-32
- ["Process Setup Screen, Batch Filter Properties Tab"](#) on page 13-33
- ["Process Setup Screen, Process Properties Tab"](#) on page 13-34
- ["Process Setup Screen, Field Mappings Tab"](#) on page 13-36

### 13.8.5.5 Process Setup Screen, General Settings Tab

Use this tab to enable a configuration and identify its name and type.



Element	Description
Configuration Name	Enter a name for the configuration. Names must be unique for the selected application.
Enabled	Select this field to activate or deactivate the configuration. A deactivated configuration is temporarily unavailable for processing.
Configuration Type	Specify the configuration type (Default or Filter). A filter-type configuration processes batches that match its specified filter. The default configuration provides a catch-all configuration that processes any batches that do not match any other configuration's filters. Note that you can create only one default configuration for an application. (An asterisk displays before its name in the Process Configurations list.)
Enable Filtering Based on	Specify the basis on which you want documents filtered. You can choose Batch Prefixes, Batch Statuses and/or Index Values Field. (If you select multiple fields, documents that match any of the criteria are processed by the configuration.) After selecting one or more fields, you specify the actual criteria on the Batch Filter Properties tab, as described in " <a href="#">Process Setup Screen, Batch Filter Properties Tab</a> " on page 13-33. If you choose to filter based on a document index value, select the Index Field Values field and select the Capture index field on which you want to search in the Index Field field.

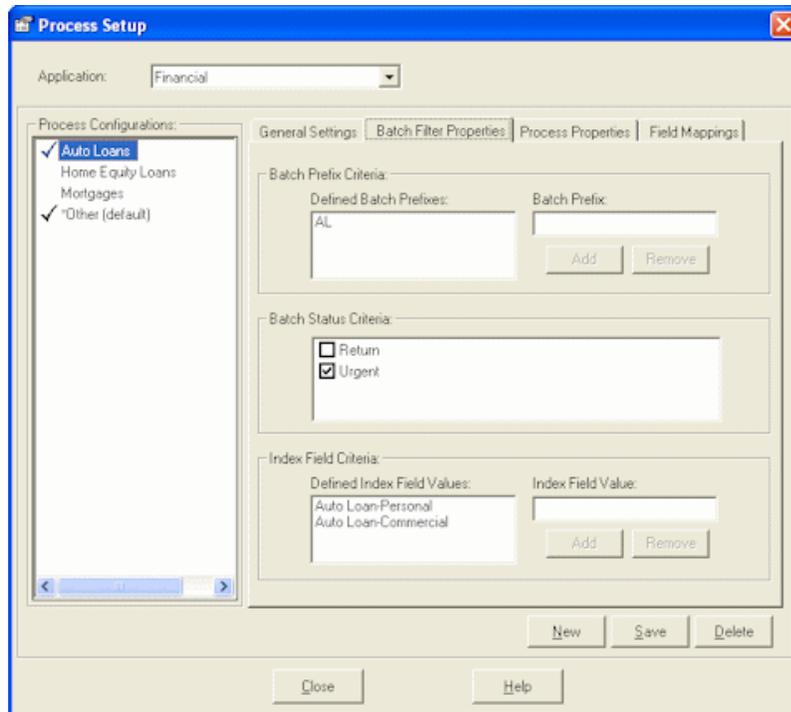
#### 13.8.5.6 Process Setup Screen, Batch Filter Properties Tab

Use this tab to specify which documents are processed by the selected configuration, based on their batch prefix, batch status or index field value.

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**Note:** In order to specify filter criteria on this tab, you must select the corresponding filter on the General Settings tab (see "[Process Setup Screen, General Settings Tab](#)" on page 13-32). For example, to filter documents by batch prefix, you must select Batch Prefixes on the General Settings tab and specify the prefixes on this tab.

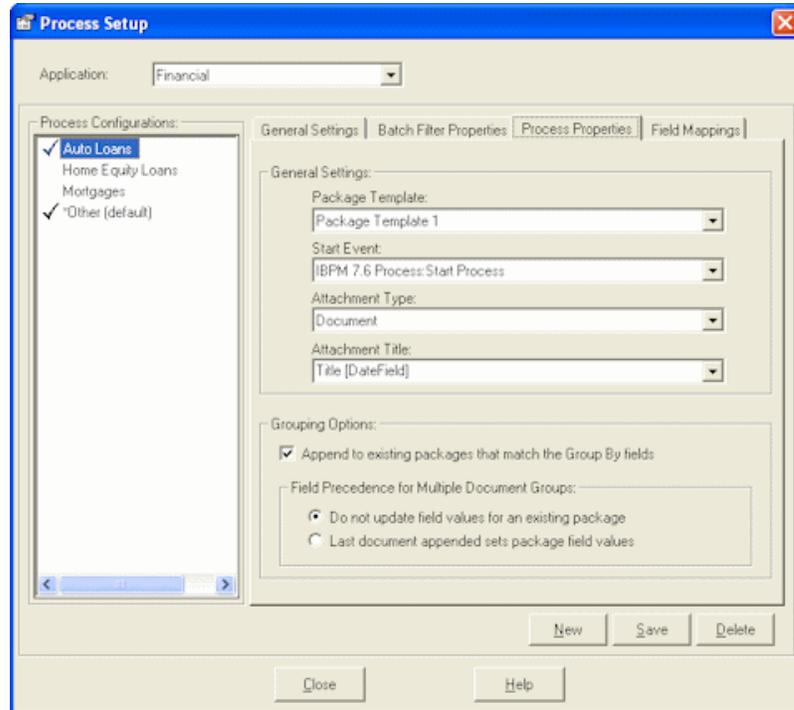
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Element	Description
Batch Prefix Criteria	To specify a batch prefix, enter it in the Batch Prefix field and click Add. It is added to the Defined Batch Prefixes list. You can enter multiple prefixes. To remove a batch prefix from the defined list, select it and click Remove. If multiple prefixes are added, a batch that matches any of the prefixes will be processed.
Batch Status Criteria	To specify a batch status, select it from the list of statuses defined for the application. You can select multiple statuses. A batch matching any of the selected statuses will be processed.
Index Field Criteria	To specify an index value, enter it in the Index Field Value field and click Add. It is added to the Defined Index Field Values list. You can enter multiple index values. A batch matching any of the specified index field values will be processed. To remove an index value from the defined list, select it and click Remove.

### 13.8.5.7 Process Setup Screen, Process Properties Tab

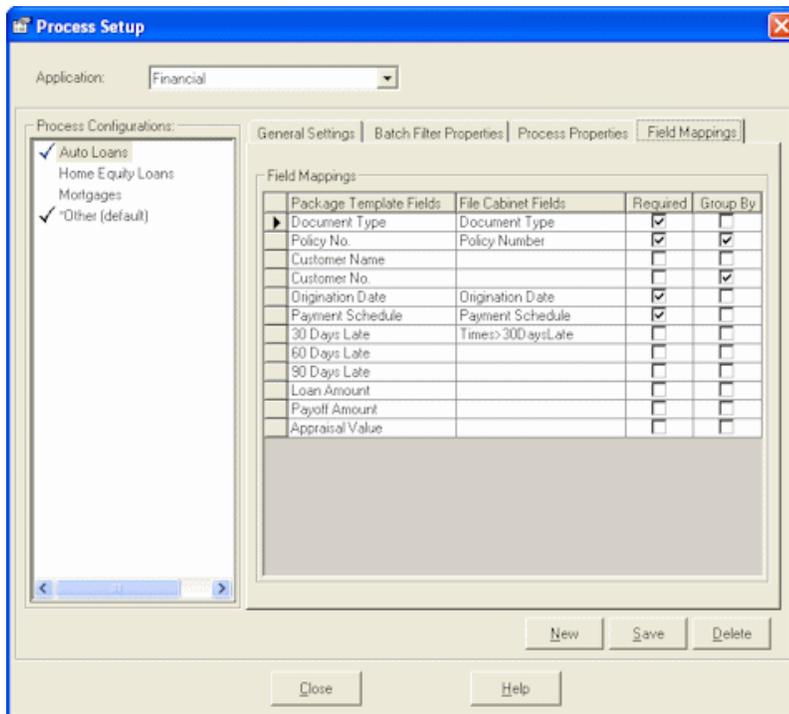
Use this tab to specify how documents are processed using the selected configuration.



Element	Description
Package Template	Specify the Process package template to use.
Start Event	Specify the Process start event to place packages into.
Attachment Type	Specify the attachment type (if any).
Attachment Title	Specify the attachment title, by selecting one or more Capture index field names or entering characters. (Index field names are listed in brackets.) Upon commit, the index value of the selected field becomes the attachment title of the package. To select an index field, click the dropdown and choose an index field. Select additional fields to append them to the title. You can also type characters as literals. For example, if the title is [Field 1][Field 2], you could type between the two fields, as in [Field 1] - [Field 2].
Grouping Options	<p>Use these options to determine how packages are grouped together. To specify Group By fields, see "<a href="#">Process Setup Screen, Field Mappings Tab</a>" on page 13-36.</p> <ul style="list-style-type: none"> <li>Choose <b>Append to existing packages that match the Group By fields</b> to append the incoming document to an existing package if their specified Group By field values match. (If a package cannot be found, a new package is automatically created.) If this box is NOT checked, documents are placed in new packages even if their Group By field values match those in existing packages.</li> <li>Use the <b>Field Precedence for Multiple Document Groups</b> options to specify how you want index values handled when appending documents to packages. If you choose <b>Do not update field values for an existing package</b>, index field values are never modified when documents are appended to packages. If you choose <b>Last document appended sets package field values</b>, index field values are changed to those of the appended document.</li> </ul>

### 13.8.5.8 Process Setup Screen, Field Mappings Tab

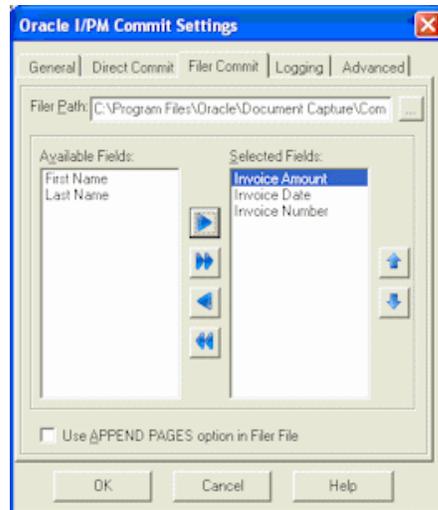
Use this tab to specify required index fields and index fields whose values are used to group packages together. (You map package fields to file cabinet index fields in the Package Template.)



Element	Description
Required	When checked, the file cabinet (application) index field must contain a value in order for the document to be placed into a Process package. Documents with missing required index values are committed but not placed in a Process package.
Group By	Use this box to specify if an index field is used to group packages together. For example, checking the Customer No. field means that packages with the same Customer No. value will be appended into existing packages. Note that the Grouping Options you select on the Process Properties tab (see " <a href="#">Process Setup Screen, Process Properties Tab</a> " on page 13-34) determine whether documents are actually appended in packages: If this option is checked, documents are appended to all packages in Process whose Group By field values match.  Checking multiple Group By fields create an AND condition, where a matching value must be found for each checked Group By field in order for the package to be grouped with other packages.

### 13.8.5.9 Oracle I/PM Commit Settings Screen, Filer Commit Tab

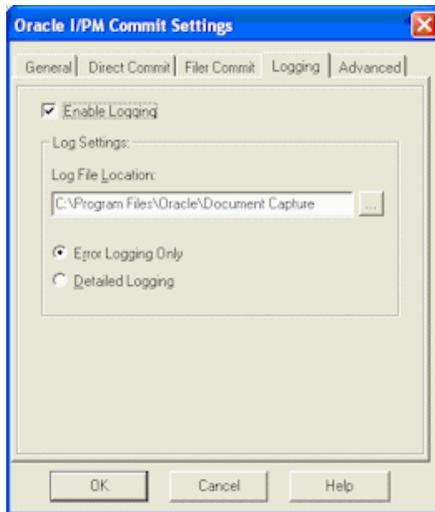
Use this tab to select settings for committing documents via Filer files. Note that this tab is available when Filer File Commit is selected on the General tab (see "[Oracle I/PM Commit Settings Screen, General Tab](#)" on page 13-29).



Element	Description
File Path	Enter the I/PM Filer path that Filer uses for processing Filer files.  <b>Note:</b> This path can be either a mapped drive letter or a UNC path; however, Oracle I/PM prefers a mapped drive letter. It is recommended that the path be configured the same on all Capture workstations, and the Oracle Filer program must have access to the path.
Available Fields, Selected Fields	Select and order the Capture fields you want committed to the Filer file. Use the left and right arrow keys to move fields to the Selected Fields box. Use the up and down arrow keys to change their order.
Use APPEND PAGES option in Filer File	Select this field to instruct Filer to search for documents with the same index values, and if found, append the document's pages to the existing Filer file document.

#### 13.8.5.10 Oracle I/PM Commit Settings Screen, Logging Tab

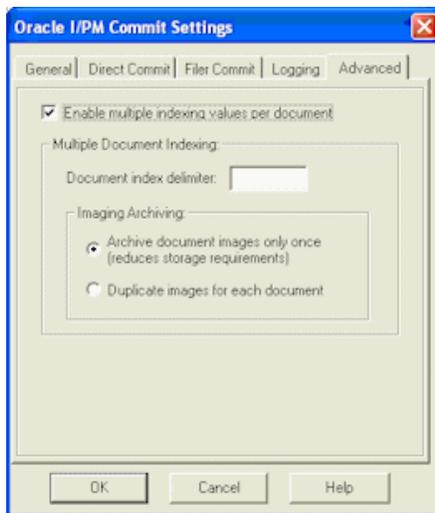
Use this tab to set logging options. When enabled, two log files are generated each day and written to the same location: a log file for the Oracle I/PM commit (whose filename uses the format EDPmmdyy.log) and a log file for Oracle process (whose filename uses the format SCPmmdyyyy.log).



Element	Description
Enable Logging	Select this field to activate logging for the Oracle I/PM commit profile.
Log File Location	Specify a folder in which to store log files as they are created.
Error Logging Only/Detailed Logging	Select Error Logging Only to write to the log only if an error occurs. Select Detailed Logging to log all related actions.

### 13.8.5.11 Oracle I/PM Commit Settings Screen, Advanced Tab

Use this tab's options to specify how multiple documents can be created for one or more batch pages. You might use this functionality, for example, to allow users to index insurance policy documents under more than one policy number. For example, indexing users might enter *12345!67890* in a Policy Number field (where ! is specified as the delimiter) to create two separate documents—one with policy number 12345, and the other with 67890.



Element	Description
Enable multiple indexing values per document	Select this field to allow multiple indexing (where one batch page can be associated with multiple documents). This option is typically combined with an Index macro.
Document index delimiter	Enter the delimiter that is used to separate different sets of index values. For example, enter a   (pipe) character.
Imaging Archiving	Select options as needed. <ul style="list-style-type: none"> <li>Choose Archive document images only once to archive pages associated with multiple documents only once in I/PM. This means that multiple documents may refer to the same page in storage.</li> <li>Choose Duplicate images for each document to include the associated pages in I/PM with each document.</li> </ul>

## 13.8.6 Oracle I/PM 11g Commit Settings Screen

Use the Oracle I/PM 11g Commit Settings screen to configure an Oracle I/PM 11g commit profile.

- ["Oracle I/PM 11g Commit Settings Screen, General Tab"](#) on page 13-39
- ["Oracle I/PM 11g Commit Settings Screen, Field Mappings"](#) on page 13-40
- ["Oracle I/PM 11g Commit Settings Screen, Advanced Tab"](#) on page 13-41

### 13.8.6.1 Oracle I/PM 11g Commit Settings Screen, General Tab

Use this tab to select general settings for the Oracle I/PM commit profile, including its commit method.

The screenshot shows the "Oracle I/PM 11g Commit Settings" dialog box with the "General" tab selected. The dialog has three tabs: "General", "Field Mappings", and "Advanced".

**Commit Methods:**

- Direct Commit
- Input Agent Commit

**I/PM Login:**

- User ID:
- Password:
- Security Policy:  (dropdown menu)
- I/PM Web Service URL:  (example: http://host:port/imaging/ws)
- 

**Input Agent Commit Settings:**

- Capture Output Directory:  (with browse button "...")
- Input Agent Input Directory:  (dropdown menu)

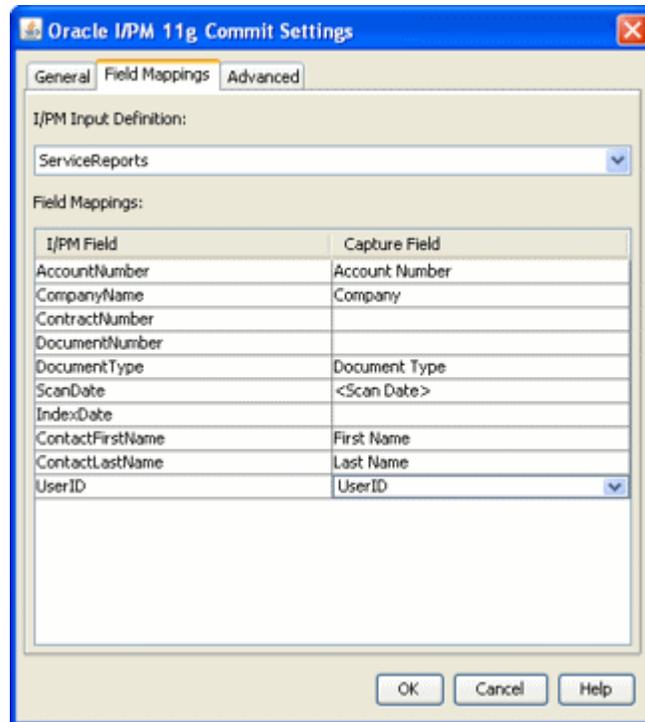
At the bottom of the dialog are three buttons: , , and .

To display this screen, open a commit profile in Capture Administration, select **Oracle I/PM 11g Commit Driver** in the Commit Driver field, and click the adjacent **Configure** button.

Element	Description
Direct Connect	Choose this commit method to commit documents directly into Oracle I/PM. See " <a href="#">About Direct Committing</a> " on page 2-12.
Input Agent Commit	Choose this commit method to create an Oracle I/PM input file for each committed batch to bulk upload into Oracle I/PM using input agent. See " <a href="#">About Input Agent Committing</a> " on page 2-13.
User ID	Enter a valid user name to use when committing documents into Oracle I/PM.
Password	Enter a valid password (case sensitive) to use when committing documents into Oracle I/PM.
Security Policy	Specify the security policy configured on the Oracle I/PM server being used for the commit. For example, select <b>Token Security</b> if token security is configured on the server. If no policy is configured, select <b>Basic Security</b> .
I/PM Web Service URL	Specify the server to use (for example, <i>http://host:port/imaging/ws</i> ). The account you specify must have Create Index rights to any applications being used.
Connect	Click this button to connect to the specified Oracle I/PM server using the login and security information provided.
Capture Output Directory	<p>If committing using an input agent, use this field and the <b>Input Agent Input Directory</b> field to specify where input files are output and located by the input agent. The fields identify the same directory in different ways. This field specifies the physical location in which to write the delimited input files and associated images. For example, the Capture output directory (running on Windows) might be:</p> <pre>\\Server_IPM1\InputAgent\Input</pre>
Input Agent Input Directory	<p>If committing using an input agent, use this field and the <b>Capture Output Directory</b> field to specify where input files are output and located by the input agent. (The fields identify the same directory in different ways.)</p> <p>Select the input directory listed for the Oracle I/PM instance that the Input Agent monitors for matching input files. This field lists input directories configured in Oracle I/PM administration for the input agent. For example, an input agent input directory (running on Linux) might be:</p> <pre>IPM/InputAgent/Input</pre>

### 13.8.6.2 Oracle I/PM 11g Commit Settings Screen, Field Mappings

Use this tab to map Capture index fields to a selected Oracle I/PM application's fields.

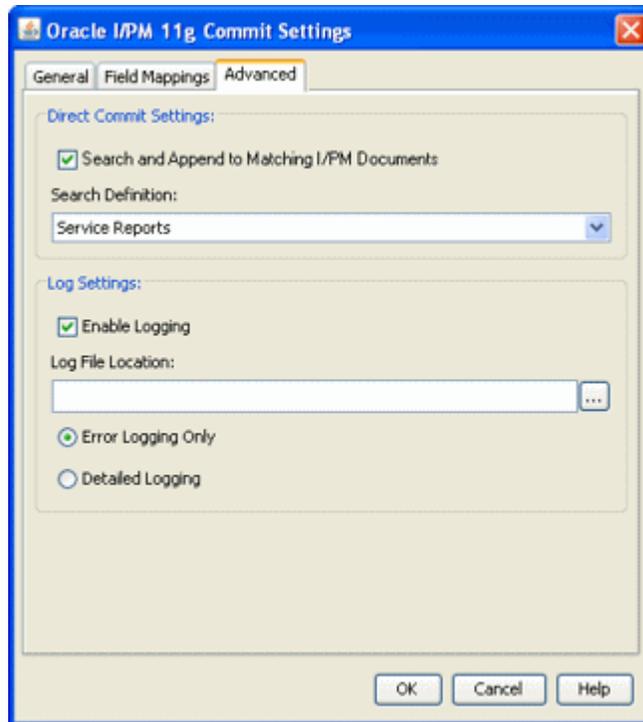


To display this screen, open a commit profile in Capture Administration, select **Oracle I/PM 11g Commit Driver** in the Commit Driver field, click the adjacent **Configure** button, and click the Field Mappings tab.

Element	Description
I/PM Application, I/PM Input Definition	<p>Select the Oracle I/PM application or input definition with which to map Capture fields, from those available on the specified Oracle I/PM system.</p> <ul style="list-style-type: none"> <li>When <b>Direct Commit</b> is selected on the General tab, this field is called <i>I/PM Application</i>, and it lists applications.</li> <li>When <b>Input Agent Commit</b> is selected on the General tab, this field is called <i>I/PM Input Definitions</i>, and it lists definitions, which reference an application's fields.</li> </ul> <p>After you make a selection, the table is automatically populated with fields from the selected or referenced Oracle I/PM application.</p>
I/PM Field	Lists fields in the selected Oracle I/PM application or input definition.
Capture Field	<p>Select Capture index fields to write their values as metadata values to corresponding Oracle I/PM fields. For example, to map a document type field, you might select a Capture field called <i>Doc Type</i> adjacent to an Oracle I/PM field called <i>DocumentType</i>.</p> <p>Capture fields enclosed in &lt;&gt; characters are system fields provided by Capture.</p>

### 13.8.6.3 Oracle I/PM 11g Commit Settings Screen, Advanced Tab

Use this tab to specify logging options, and if configuring a direct commit, to specify search and append options.



To display this screen, open a commit profile in Capture Administration, select **Oracle I/PM 11g Commit Driver** in the Commit Driver field, click the adjacent **Configure** button, and click the Advanced tab.

Element	Description
Search and Append to Matching I/PM Documents	Select this field to search for Oracle I/PM documents with matching metadata values, and if found, append to the existing document instead of creating a new one. Whether a match is found is based on search criteria specified in the selected Oracle I/PM search definition.  This field is available for direct committing only, with multiple page TIFF as the selected document output format.
Search Definition	Select a search definition (previously created in Oracle I/PM) to use to search for matching documents.
Enable Logging	Select this field to activate logging for the commit profile. The log filename uses the format IPMMMMDDYY.log.
Log File Location	Specify a folder in which to store log files as they are created.
Error Logging Only/Detailed Logging	Select <b>Error Logging Only</b> to write to the log only if an error occurs. Select <b>Detailed Logging</b> to log all commit-related actions.

### 13.8.7 Commit Text File Settings Screen

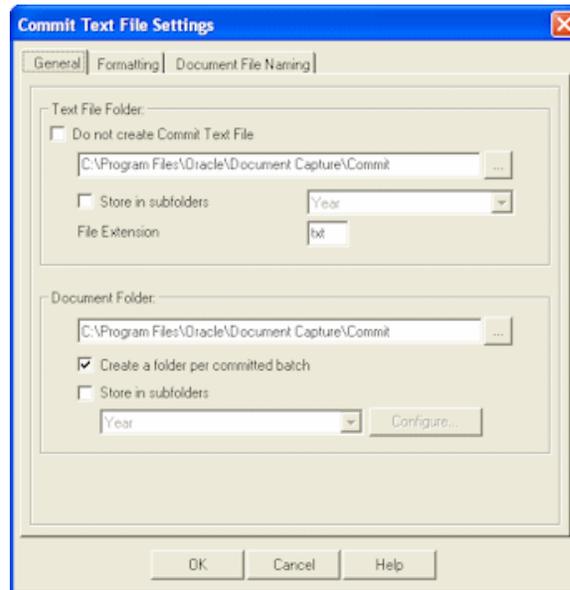
Use this screen to change the commit text file's default settings. By default, Capture creates a quotation, comma-separated text file that contains the full path to each image file, followed by document index data. The images are extracted from the batch and inserted into a folder beneath the commit folder. The text file and new batch folder are created under the Commit folder you specified during batch setup.

Display this screen by selecting the Commit Text File commit profile in the side pane and clicking Configure to configure driver settings. Select settings on these tabs:

- "Commit Text File Settings Screen, General Tab" on page 13-43
- "Commit Text File Settings Screen, Formatting Tab" on page 13-44
- "Commit Text File Settings Screen, Document File Naming Tab" on page 13-45

### 13.8.7.1 Commit Text File Settings Screen, General Tab

Use this tab to specify how commit text files and document files are written.



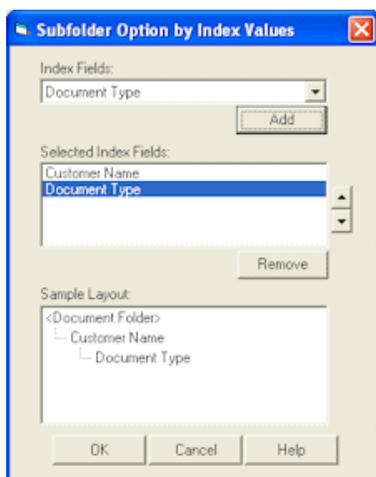
Element	Description
Do not create Commit Text File	Select this field to create document files but no commit text file. When this option is selected, it is typically combined with options on the Document File Naming tab so that document files are named using index field values.
Text File Folder	Select the folder in which you want commit text files written. By default, this field displays the commit folder specified during batch setup (see "Capture Batch Setup Screen" on page 13-3).
Store in subfolders	Select this field to store commit text files in subfolders named by commit date. Select a date option in the adjacent field. Along with Year, you can choose Year and Month or Year, Month and Day to create further subfolders for documents.
File Extension	If needed, enter a different file extension for the commit file(s). The default extension is .TXT.
Document Folder	Select the folder in which you want document files written. By default, this field displays the commit folder specified during batch setup (see "Capture Batch Setup Screen" on page 13-3).
Create a folder per committed batch	Select this field to create a folder for each committed batch, where folders are named using the syntax BatchID.FileCabinetID (internal IDs assigned by Capture).

Element	Description
Store in subfolders	<p>Select this field to store document files in subfolders named by commit date or index value, then select a subfolder storage option.</p> <ul style="list-style-type: none"> <li>■ If storing in subfolders named by date, you can choose Year, Year and Month or Year, Month and Day to create further subfolders for documents.</li> <li>■ If storing in subfolders named by index value, choose By Index Value(s) and click the adjacent Configure button.</li> </ul>

### 13.8.7.2 Subfolder Option by Index Value

Use this dialog box to store documents files in subfolders named by index value.

For example, you might configure documents to be written to a company subfolder (within the specified commit folder), and within that, by type of document. The commit destination for a document with a company name of Acme and a file type of Financial might be: \\Commit\Acme\Financial

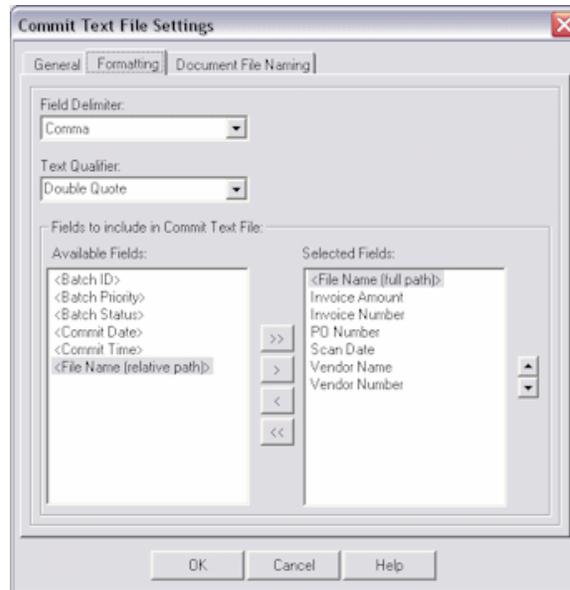


Display this dialog box by clicking Configure on the General tab of the Commit Text File Settings screen.

Element	Description
Index Field, Add	Select an index field whose value will be used to name the subfolder. Click Add to add it to the Selected Index Fields list.
Selected Index Fields, Remove	Use the arrow buttons to change the order of subfolders.
Sample Layout	Displays the folder hierarchy for current settings.

### 13.8.7.3 Commit Text File Settings Screen, Formatting Tab

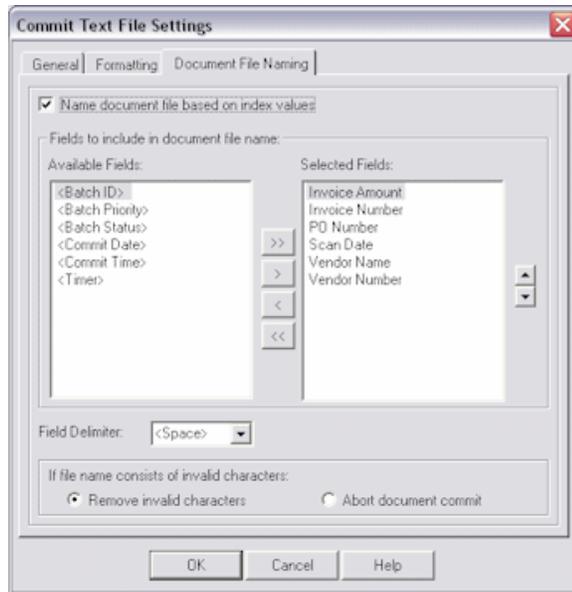
Use this tab to specify the fields and delimiters used in the commit file.



Element	Description
File Delimiter	Define the character to use to separate fields within the commit file. You can choose: Comma (default), Semicolon, Tab or Other. If you choose Other, an Other Character field displays, allowing you to enter a delimiter character.
Text Qualifier	Specify the character mark used to identify the beginning and end of text fields. This text qualifier is used if needed, regardless of the file cabinet field's data type. You can choose: Double quote (") (the default), Single quote (') or None.
Fields to include in Commit Text File	<p>Use this option to customize the fields included in the commit file and their order. To include a field, select it in the Available Fields list and click the right arrow to move it to the Selected Fields list. By default, all file cabinet fields are included, in the order in which they appear within the file cabinet. Below are additional system fields you can include:</p> <ul style="list-style-type: none"> <li>■ Batch ID (Capture's unique Batch ID)</li> <li>■ Batch Priority</li> <li>■ Batch Status</li> <li>■ Commit Date</li> <li>■ Commit Time</li> <li>■ File Name (full path): the full path to the document file (for example, c:\commit\00000001.001\00000001.TIF).</li> <li>■ File Name (relative path): the path to the batch folder/document file relative to the commit folder (for example, 00000001.001\00000001.TIF). If you select this option along with the Commit Text File folder option on the General tab, this field would include only the document file name (for example, 00000001.TIF).</li> </ul>

#### 13.8.7.4 Commit Text File Settings Screen, Document File Naming Tab

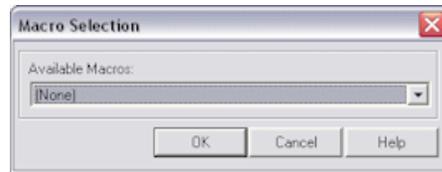
Use this tab to customize how document files are named.



Element	Description
Name document file based on index files	Select this field if you want document files named using selected fields and options shown on this tab. If deselected, Capture names document files using a default naming scheme that combines the internal batch ID, an underscore and a numeric identifier.
Fields to include in document file name	Select one or more fields whose values will comprise the file name. Use the up/down arrows to specify the order in which the selected fields will make up the document file name, separated by the selected field delimiter. All file cabinet fields are available, along with the following system level fields: <ul style="list-style-type: none"> <li>■ Batch ID</li> <li>■ Commit Date</li> <li>■ Commit Time</li> <li>■ Timer (number of milliseconds after midnight)</li> <li>■ Batch Priority</li> <li>■ Batch Status</li> </ul>
Field Delimiter	Specify a character to use to separate fields within the file name. You can select {space} (the default), or type in a character such as a - (dash).
If file name consists of invalid characters	Specify what happens if Capture detects invalid characters in a file name. This might happen, for example, if a user entered an index value containing a question mark or a forward slash character. You can choose to either remove the invalid characters or abort the document commit.

### 13.8.8 Macro Selection Screen

Use this screen to select an EDP (Electronic Document Provider) macro for committing batches directly to a content management system. Display this dialog box by creating a commit profile, selecting **Electronic Document Provider** in the Commit Driver field and clicking its **Configure** button.



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Element	Description
Available Macros	Select an EDP macro.

---

## 13.8.9 Database Commit Settings Screen

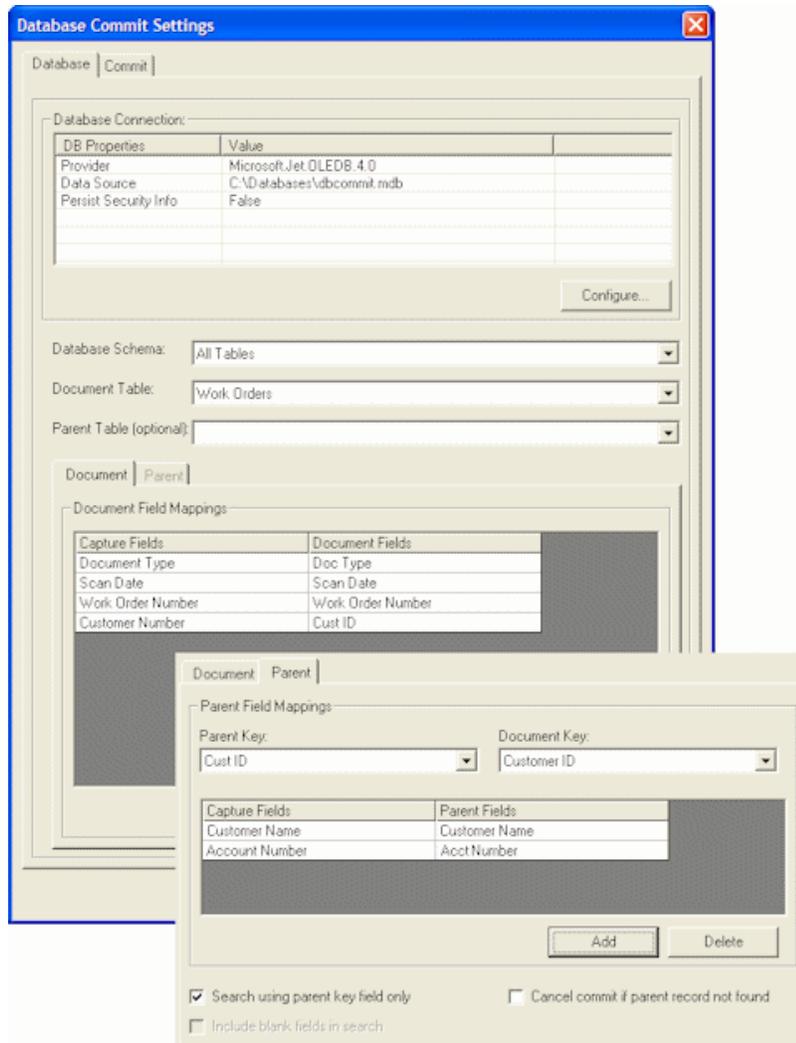
Use this screen to configure a database commit profile, which commits from Capture to a variety of databases. In the commit driver settings, specify where the document files are stored and which document index values are written to the database.

Display this screen by creating a commit profile, selecting Database Commit Driver in the Commit Driver field and clicking Configure to configure driver settings. Select settings on these tabs:

- ["Database Commit Settings Screen, Database Tab"](#) on page 13-47
- ["Database Commit Settings Screen, Commit Tab"](#) on page 13-51

### 13.8.9.1 Database Commit Settings Screen, Database Tab

Use the Database tab to configure the database connection, select the database table and maps fields, including parent fields (optional).



Element	Description
Database Connection, Configure	Click Configure to configure the database connection.
Database Schema	Select a database schema if applicable or select All Tables.
Document Table	Select the database table to which you want to commit.
Parent Table	Select the parent table to which you want to commit. This optional setting allows you to search and write index values to a parent table while committing to the document table.
Document tab, Document Field Mappings tab	Map Capture fields to fields from the document table. Click the Add button. In the Add Document Field Mapping dialog box that displays, select the fields you want to map from the Capture and document fields. Repeat to map additional fields. Remove a mapping by selecting it and clicking Delete.
Parent tab	This tab is available when a parent table is selected in the Parent Table field.
Parent Key, Document Key	Select a key field for each field. These fields must be of the same data type. You do not need to designate the key fields as primary keys or define a join relationship between them in the database.

Element	Description
Mapping table	Map Capture fields to fields from the parent table. Click the Add button. In the Add Parent Field Mapping dialog box that displays, select the fields you want to map from the Capture and parent fields. Repeat to map additional fields. Remove a mapping by selecting it and clicking Delete.
Search using the parent key field only	This field controls how Capture searches the parent table. For more information, see " <a href="#">Linked Tables Searching</a> " on page 13-49. <ul style="list-style-type: none"> <li>■ When selected, Capture searches for a matching value in the parent key field only. If other fields are mapped on the Parent tab, they are ignored.</li> <li>■ When deselected, Capture searches the parent table using ALL mapped fields. This creates an AND condition, where ALL mapped fields must match.</li> </ul>
Include blank fields in search	This field controls whether records are matched when Capture searches the parent table and finds null values for mapped fields. For more information, see " <a href="#">Blank Fields Searching</a> " on page 13-50.
Cancel commit if parent record not found	Select this field to skip document commit if no matching parent record is found. For more information, see " <a href="#">Linked Tables Searching</a> " on page 13-49.

#### 13.8.9.1.1 Linked Tables Searching

How the parent table is searched depends on the **Search using the parent key field only** field's setting.

##### Selected

When selected, Capture searches for a matching value in the key field only of the parent table.

- If an exact match is found on the parent key field, Capture inserts the document record into the document table using the values mapped on the Document tab. If other fields are mapped on the Parent tab, they are ignored.
- If an exact match is NOT found on the parent key field, the action Capture takes depends on the **Cancel commit if parent record not found** field.
  - If unchecked (default), Capture creates a new record in both tables that contains the key field values as well as mapped field values.
  - If checked, Capture skips committing that document but continues committing the batch. A message saying the document could not be committed is displayed to users.

---

**Note:** When searching, Capture uses the first matching record it finds.

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**Note:** Since only one field is searched when the **Search using parent key only** field is checked, null values are not allowed. For that reason, the **Include blank fields in search** field is disabled.

---

**Deselected**

Capture searches the parent table using all mapped fields. This creates an AND condition, where all mapped fields must match.

- If an exact match is found, Capture does not write any values to the parent table, but uses the parent key value as the foreign key in the document table and inserts the document record into the document table using the values mapped on the Document tab.
- If an exact match is NOT found, one of the following occurs, depending on whether the **Cancel commit if parent record not found** field is selected:
  - If NOT selected (default), Capture creates a new record in both the parent and document tables that includes the key field value and mapped field values.
  - If selected, Capture skips committing the document, continues committing other documents in the batch, and displays a message to the user that the document was not committed.

---

**Note:** When searching, Capture uses the first matching record it finds.

---



---

**Note:** When searching this way, you can use a primary key in the parent table that is not used as a document index field (for example, an auto-increment field).

---

**13.8.9.1.2 Blank Fields Searching**

The **Include blank fields in search** field determines if a match is found when Capture is searching for a null value because the Capture index user left an indexing field blank.

Suppose a Capture index user entered the following values in Cust ID and Cust Name fields that match a record in the parent table, but left the SSN field blank.

- Cust ID = 12345
- Cust Name = John Doe
- SSN = <blank>

Table 13–1 lists possible parent table database values for this example. The Matched column indicates whether Capture will find a match based on the **Include blank fields in search** option.

**Table 13–1 Example: Parent Table Values when Blank Fields Included in Searches**

Cust ID database field value	Cust Name database field value	SSN database field value	Include blank fields in search?	Matched?
12345	John Doe	111-11-1111	No	Yes
12345	John Doe	111-11-1111	Yes	No
12345	John Doe	Null	No	Yes
12345	John Doe	Null	Yes	Yes

The table shows that when the **Include blank fields in search** option is checked and a mapped Capture field is left blank, Capture searches the mapped database field for a

null value, and matches the record only if it finds a null value. If the option is NOT checked, Capture excludes the blank mapped field(s) from the search.

### 13.8.9.2 Database Commit Settings Screen, Commit Tab

Use the Commit tab to specify how you want document files stored. You can commit document files to a folder and/or a database table. To save document values to a database but not document files, leave the options on this tab blank.

Element	Description
Folder	Select this field to commit document files to a folder.
Commit Document File Folder	Specify where you want the document files written. To browse to a folder, click the Browse button and select a folder.
Store in subfolders by date	Select this field to store document files in subfolders named by commit date and select a date option in the dropdown field below. Along with Year, you can choose Year and Month or Year, Month and Day to create further subfolders for documents.
Store Document Path	Select the field in which you want the document file's full path stored. This field lists all fields in the database.
Database table	Select this field to commit document files to a specified a database field.

Element	Description
Store in Image/Blob	Select the database field in which you want the document files stored. The data type for this field must support long binary data.

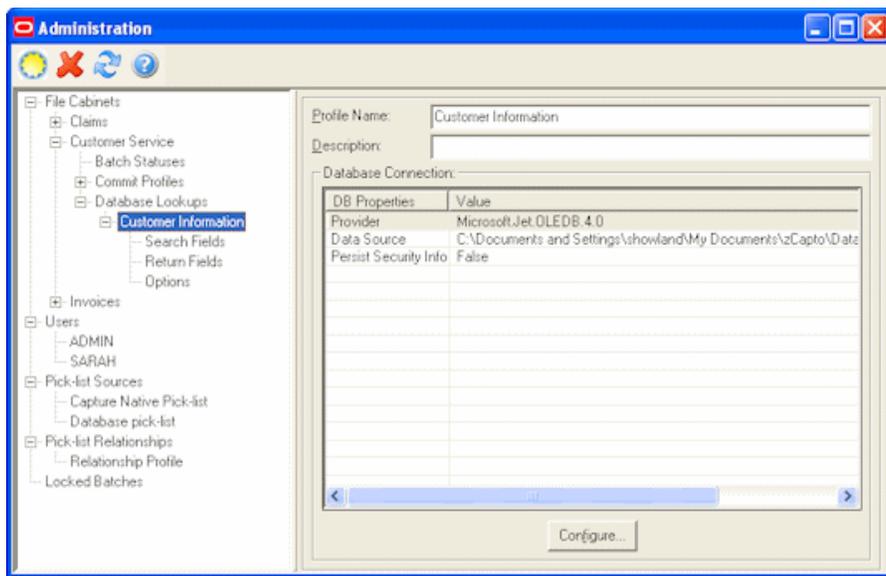
## 13.9 Database Lookups Screens

Database lookups include the following screens:

- "Database Lookup Settings Screen" on page 13-52
- "Return Fields Screen" on page 13-54
- "Search Options Screen" on page 13-55

### 13.9.1 Database Lookup Settings Screen

Use this screen to define a database lookup profile for use in Capture. For more information, see "About Database Lookups" on page 2-5.

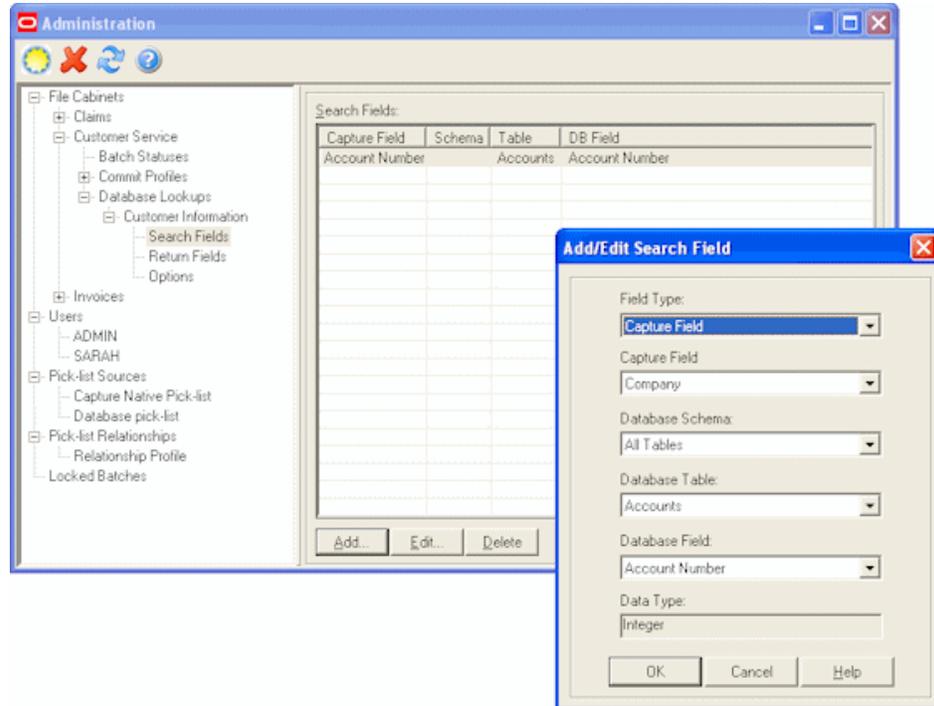


Display this screen by clicking the **Database Lookups** heading in the side pane for a selected file cabinet. Click the **New** (sun) button on the toolbar to add a database lookup.

Element	Description
Pick-list Source Name	Displays the name of the database lookup. You can change it if needed.
Description	Enter a description of the database lookup for reference purposes.
Database Connection	Displays database connection information.
Configure	Click to configure a connection to the database to be searched. Click Help in the database configuration screens for more information.

## 13.9.2 Search Fields Screen

Use this screen to identify search fields. For example, you might identify an *Account Number* Capture field as a search field so that when the user does a database lookup for a specific number, Capture searches an Account Number database field for a matching value.



Display this screen by selecting **Search Fields** in the side pane within a database lookup.

Element	Description
Search Fields	This table lists search fields configured for the selected database lookup.
Add	Click to add a search field in the <a href="#">Add/Edit Search Fields Screen</a> .
Edit	Click to edit a selected search field in the <a href="#">Add/Edit Search Fields Screen</a> .
Delete	Click to delete a selected search field, then confirm the deletion.

### 13.9.2.1 Add/Edit Search Fields Screen

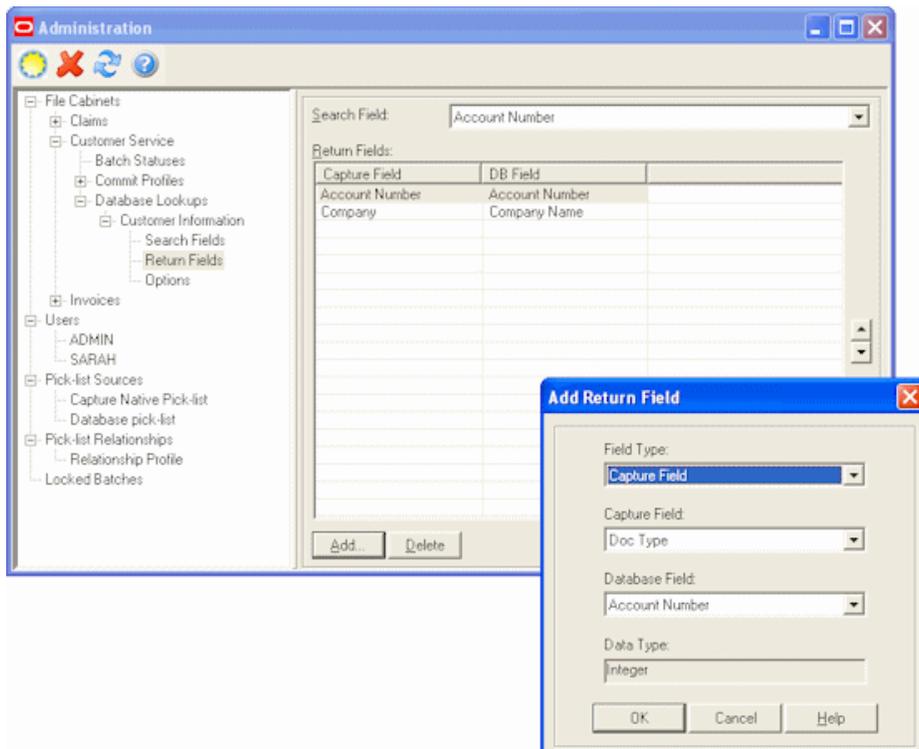
Use this screen to add or edit search fields. By specifying multiple search fields, you can provide users with more than one way to search database records and return different information. For example, you could return basic information if a user matches a customer name, but return detailed information if a user matches a Purchase Order number.

Element	Description
Field Type	Select the type of field you want to search. You can choose Capture Field (the default) or Custom Field. Custom fields cannot be mapped to an index field. However, they can be displayed in a hit-list or they can be used to search on. For example, Recognition Server can use a Custom field to search on using a bar code value.
Capture Field/Custom Field	If you selected Capture Field in the Field Type field, select the Capture field you want to search on from the list of file cabinet fields. If you selected Custom Field in the Field Type field above, enter a field name to display in the hit-list. <b>Note:</b> The search index field you select must have the same data type as the database field whose values will be searched.
Database Schema	If the database you selected contains multiple schemas, select a schema; otherwise, choose All Tables.
Database Table	From the list of tables in the specified database, select the table you want to search.
Database Field	From the list of fields in the specified table, select the field you want to search.
Data Type	Displays the data type of the field you selected in the Database Field above. This field is for reference only and cannot be edited.

### 13.9.3 Return Fields Screen

Use this screen to specify return fields for each search field you defined.

You can also add display only fields. Display only fields allow you to display other data from the external database to help in indexing a document. These fields are displayed in a hit list for validation purposes.



Display this screen by selecting **Return Fields** in the side pane within a database lookup.

Element	Description
Search Field	From the list of defined search fields, select one for which to define a return field.
Add	Click to add a return field for the selected search field in the <a href="#">Add Return Field Screen</a> .
Delete	Click to delete a return field selected in the Return Fields table.

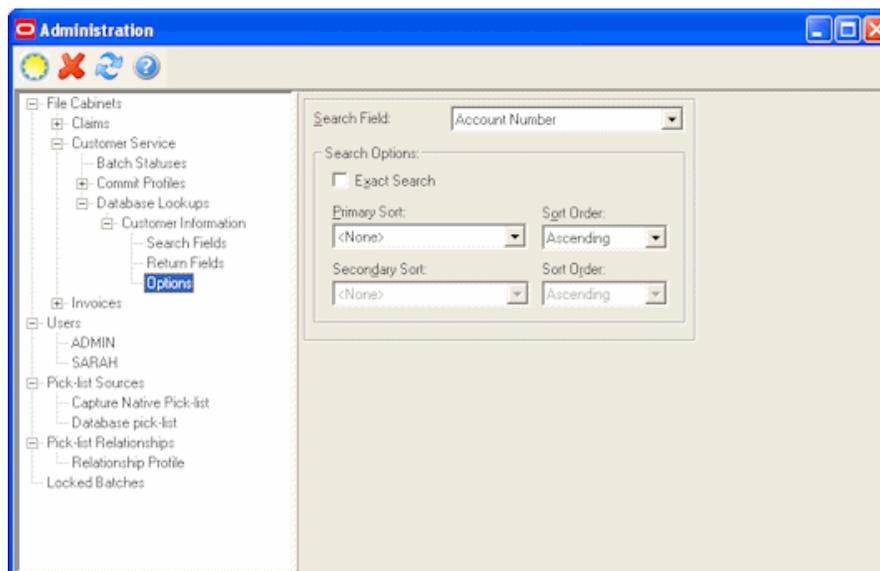
### 13.9.3.1 Add Return Field Screen

Display this screen by clicking **Add** on the Return Fields section of the Administration page.

Element	Description
Field Type	Select the type of field you want to return. You can choose Capture Field (the default) or Display Field. A display field displays data only on the hit-list.
Capture Field/Display Field	If you selected Capture Field in the Field Type field, select the Capture field you want to populate from the list of file cabinet fields. If you selected Display Field, enter a field name. For example, you might want to display a database field called CUS NO as <i>Customer Number</i> to users.
Database Field	From the list of fields in the specified table, select the field you want to return.
Data Type	Displays the data type of the field you selected in the Database Field above. This field is for reference only and cannot be edited.

## 13.9.4 Search Options Screen

Use this screen to specify how you want Capture to search database fields when a user activates a database lookup profile.



Display this screen by selecting **Options** in the side pane within a database lookup.

Element	Description
Search Field	Select a previously defined search field on which to apply search options.
Exact Search	Select this field to require the user to enter a matching value exactly as it is stored in the database. If this box is not checked (the default), the user can enter the first one or more characters, activate the search and Capture will match all values beginning with the specified characters.  <b>Note:</b> The Exact Search option applies only to alphanumeric database search fields. When searching numeric or date database fields, Capture always performs an exact search.
Primary Sort/Secondary Sort, Sort Order	Use these options to specify how you want values for the selected search field displayed in the hit-list, if a hit-list is displayed. For example, if searching for a Customers field, you might want customer records sorted in ascending order by a contact's last name in the hit-list.

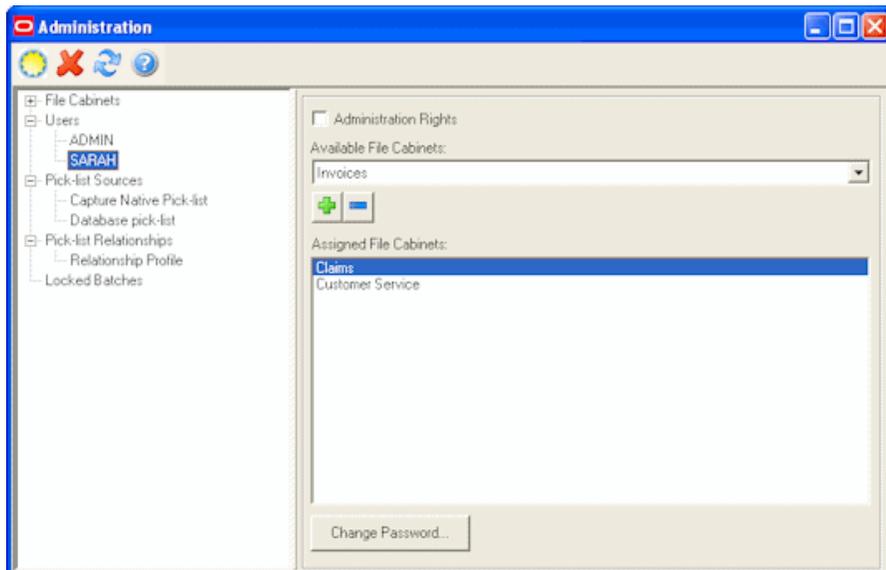
## 13.10 Users Screen

Use this screen to manage users, assigning them Capture access to specific file cabinets and administration rights. For more information, see ["About Users in Capture"](#) on page 2-2.

The security model chosen during configuration affects how you manage users in Capture:

- With *Capture security*, you add and manage users in Capture Administration on the Users screen.
- With *Windows Domain security*, users are created and assigned to groups in the Windows Domain. You use the Users screen to assign them administration rights or access to specific file cabinets.

Display this screen by selecting **Users** from the Admin menu. Click the **New** (sun) button on the toolbar to add a user. See ["Add User Screen \(Capture Security\)"](#) on page 13-57 or ["Add User or Group Screen \(Windows Domain Security\)"](#) on page 13-57.



Select a user or group in the side pane, and make changes to settings in the right pane.

Element	Description
Administration Rights	Select this field to give the user administrator access, including all Capture administration options. Users must have administration rights to manage batch scanning and index profiles, manage Capture macros, and access setup options. Administrators have access to ALL file cabinets.
Available File Cabinets	Use to assign a user access to a file cabinet. In order to use scan and index profiles, a user must have access to their assigned file cabinet. Select a file cabinet and click the plus (+) button to move it to the Assigned File Cabinets field.
Assigned File Cabinets	Lists assigned file cabinets for the selected user. To remove access to a file cabinet, select it and click the minus (-) button.
Change Password	Click to enter a new password for the selected user. This option is available for Capture security users only.

### 13.10.1 Add User Screen (Capture Security)

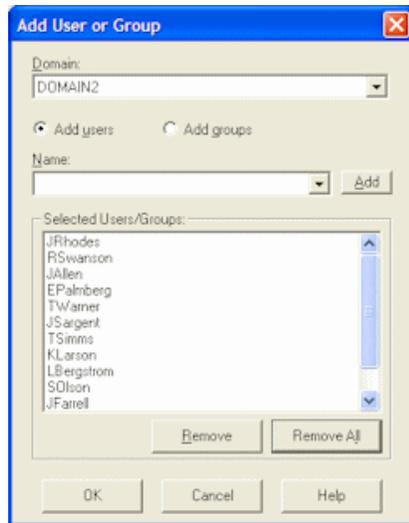
Use this screen to add users, when Capture security is used. For more information, see ["About Users in Capture"](#) on page 2-2.

Display this screen by selecting **Users** from the Admin menu, and clicking the **New** (sun) button on the toolbar.

Element	Description
User Name	Enter the user name the user will type to log in to Capture and its components. User names are not case sensitive.
Password, Confirm Password	Enter the password the user will type to log in.

### 13.10.2 Add User or Group Screen (Windows Domain Security)

Use this screen to add users and groups for a selected domain, when Windows Domain security is used. For more information, see ["About Users in Capture"](#) on page 2-2.



Display this screen by selecting **Users** from the Admin menu, and clicking the **New** (sun) button on the toolbar.

Element	Description
Domain	Select the domain from which you want to add users or groups to the Selected Users/Groups list.
Add users	Select to add users.
Add groups	Select to add groups of users. All users assigned to this group will be assigned the group's Capture rights.
Name, Add	Choose a domain user or group and click Add.
Remove, Remove All	Click to remove a selected user or group from the Selected Users/Groups list. Click Remove All to remove all users and groups.

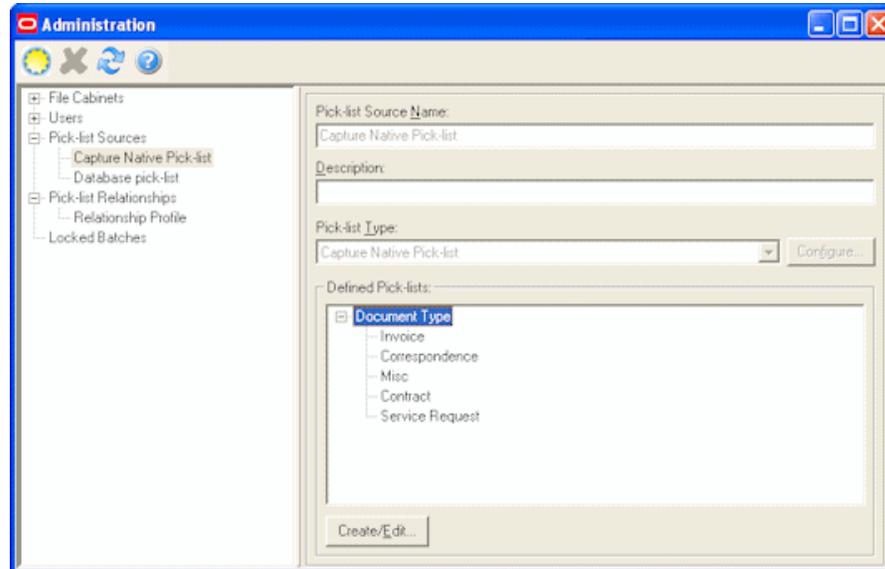
## 13.11 Pick-list Sources Screen

Use this screen to add or edit pick-list sources. This is the first step in creating a pick-list.

Display this screen by choosing **Pick-list Sources** from the Admin menu.

Pick-lists can have one of two sources:

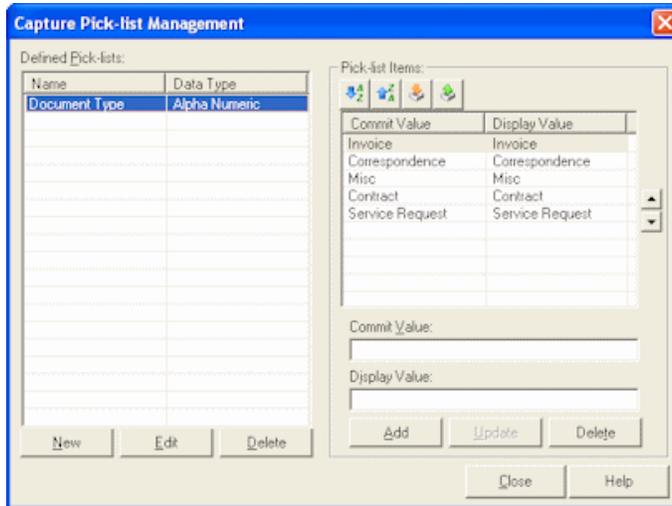
- Capture Native Pick-list, which are stored within Capture. You do not need to create a pick-list source for this type. Instead, select **Capture Native Pick-list** in the side pane and click the **Create/Edit** button to create a pick-list. See "[Capture Pick-list Management Screen](#)" on page 13-59.
- A database source. To add a database pick-list source, select **Pick-list Sources** in the side pane and click the **New** (sun) button in the toolbar. After entering a name, choose Database Pick-list in the Pick-list Type field. See "[Pick-list Configuration Screen](#)" on page 13-61.



Element	Description
Pick-list Source Name	Displays the name of the pick-list source. For Capture native pick-lists, this source name cannot be changed.
Description	Enter a description of the pick-list's purpose or contents for reference purposes.
Pick-list Type	Identifies the pick-list type. Select Database Pick-list to identify a new source as a database pick-list. You cannot change the Capture Native Pick-list source's type.
Configure	Click to configure the database connection and pick-list definitions for a database pick-list. This button is not available when creating Capture native pick-lists. See " <a href="#">Pick-list Configuration Screen</a> " on page 13-61.
Defined Pick-lists	Displays the contents of pick-lists. Select a pick-list, then click the plus sign to view a pick-list's items.
Create/Edit	Click to add, edit or delete Capture Native pick-lists, as described in " <a href="#">Capture Pick-list Management Screen</a> " on page 13-59. This button is not available when creating database pick-lists.

### 13.11.1 Capture Pick-list Management Screen

Use this screen to add, edit or delete Capture Native pick-lists.



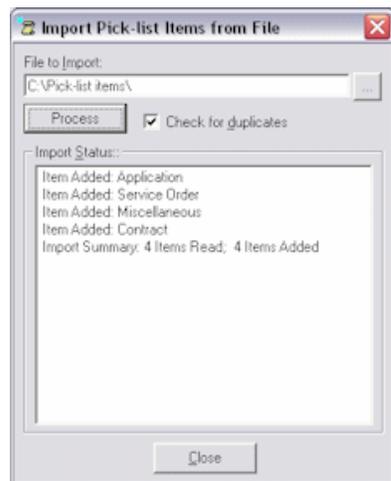
Display this screen by choosing **Pick-list Sources** from the Admin menu, selecting **Capture Native Pick-list** in the side pane, and clicking the **Create/Edit** button.

Element	Description
Defined Pick-lists	This table lists pick-lists and their data type. The items contained in the selected pick-list are displayed in the Pick-list Items table.
New	Click to create a new pick-list. When prompted, enter its name and database type. Types include: Alphabetic, Alpha Numeric, Date, Float, and Numeric.
Edit	Click to change a selected pick-list's name or database type.
Delete	Click to delete the selected pick-list or selected pick-list item.
Pick-list Items	This table lists the items contained in the pick-list selected in the Defined Pick-lists table. Their order determines the order in which they are displayed to users.
Sort Ascending, Sort Descending	Click to sort the items in ascending or descending order, based on their data type.
Up, Down	Click these up and down arrow buttons to move a selected item up or down in the item list.
Import	Click to import a delimited text file's values into the pick-list selected in the Defined Pick-lists table.
Export	Click to export values in the pick-list selected in the Defined Pick-lists table to a delimited text file.
Commit Value	Enter a pick-list value and click Add to add the pick-list item. A commit value is an index value committed with the document. It is often the same as the display value, but can be different.
Display Value	If needed, enter an alternate value to display to users in the pick-list. Leave this field blank to use the same value for display and commit values. The corresponding commit value will be committed with the document. For example, you might display a user name to users in the pick-list, but commit a Social Security Number.
Add	Click to add the value entered in the Commit Value field to the list of pick-list items.

Element	Description
Update	Click to edit a selected pick-list item. Double-click the item in the Pick-list Items table to select it, make changes in the Commit Value and Display Value fields and click Update.

### 13.11.2 Import Pick-list Items From File Screen

Use this screen to import a delimited text file's values into a selected pick-list.



Display this screen by choosing **Pick-list Sources** from the Admin menu, selecting **Capture Native Pick-list** in the side pane, and clicking **Create/Edit**. Select a pick-list in the Defined Pick-lists table and click the **Import** button on the toolbar.

Element	Description
File to Import	Select a text delimited file to import. Capture imports standard ASCII text files delimited with carriage return/line feeds. Each line within the text file is imported as a pick-list item.
Check for Duplicates	Check for and eliminate duplicate values. Note that importing large pick-lists takes longer when this option is selected.
Process	Click to import the values and displays items added and errors encountered in the Import Status area.

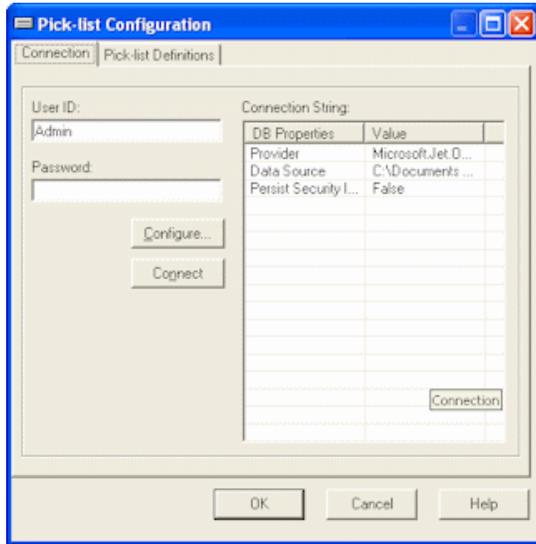
### 13.11.3 Pick-list Configuration Screen

Use this screen to configure a pick-list linked to a database. For this type of pick-list, you first connect to the database and then identify how you want the database's values used. Select settings on the screen's tabs:

- ["Pick-list Configuration Connection Tab"](#) on page 13-62
- ["Pick-list Configuration Definitions Tab"](#) on page 13-62

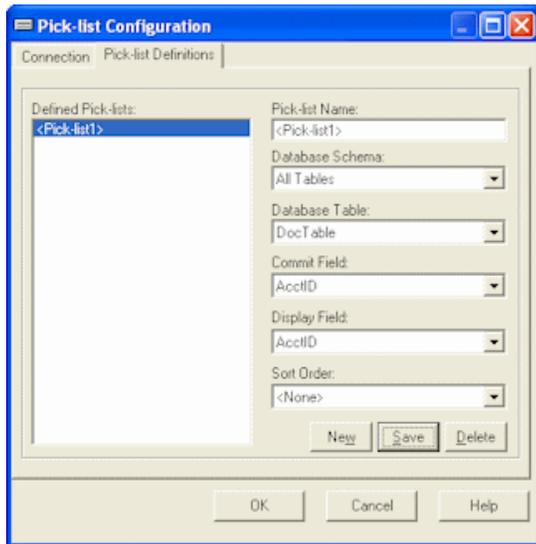
Display this screen by choosing **Pick-list Sources** from the Admin menu, selecting or creating a database pick-list, and clicking **Configure**. See ["Pick-list Sources Screen"](#) on page 13-58.

### 13.11.3.1 Pick-list Configuration Connection Tab



Element	Description
User ID, Password	If needed, complete these fields to connect to the specified database.
Configure	Click to configure the OLE DB provider for the type of data you want to access.
Connect	If needed, click to reconnect to the specified database.

### 13.11.3.2 Pick-list Configuration Definitions Tab

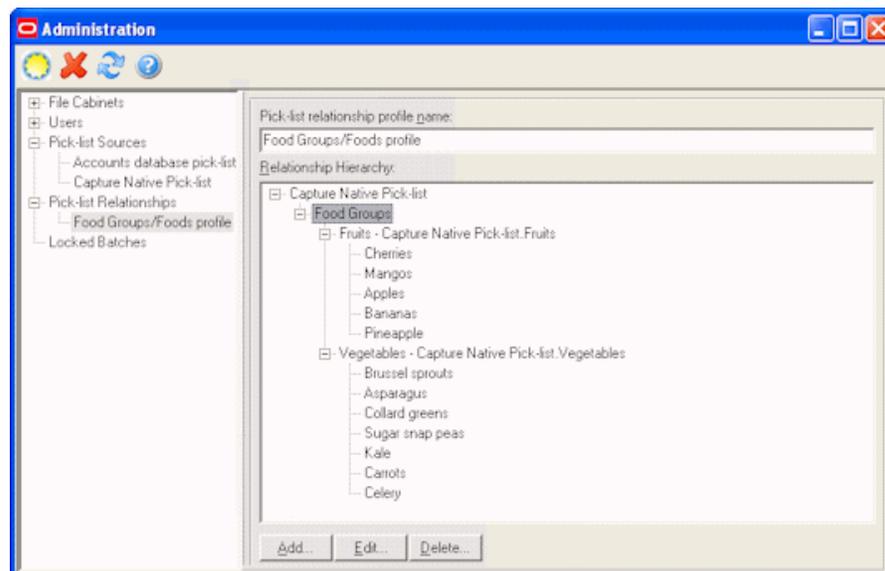


Element	Description
Pick-list Name	Enter a new name for the database pick-list.
Database Schema	If the selected database contains multiple schemas, select a schema; otherwise, choose All Tables.

Element	Description
Database Table	From the list of tables in the specified database schema, select the table to which you want to link.
Commit Field	From the list of fields in the specified table, select the field whose selected values will be committed with the document. Administrators often select the same database field for this field and the Display Field below. However, you might want to display one field's values, but commit another field's values; for example, you might display customer names to the user, but actually commit selected customers' account numbers.
Display Field	From the list of fields in the specified table, select the field whose values will be displayed to the indexing user. This is often the same field as that selected for the Commit Field above.
Sort Order	Specify the order in which you want database records displayed in the pick-list to the user (ascending or descending).
New	To add a new pick-list, click New, complete the pick-list fields and click Save.
Save	Saves the selected settings in a pick-list and displays its name in the Defined Pick-lists list.
Delete	Click to delete the pick-list selected in the Defined Pick-lists list.

## 13.12 Pick-list Relationships Screen

Use this screen to create parent/child relationships between previously created pick-lists. In a parent/child relationship, a parent field is linked to one or more child pick-lists, one of which is displayed after the user makes a selection in the parent field.

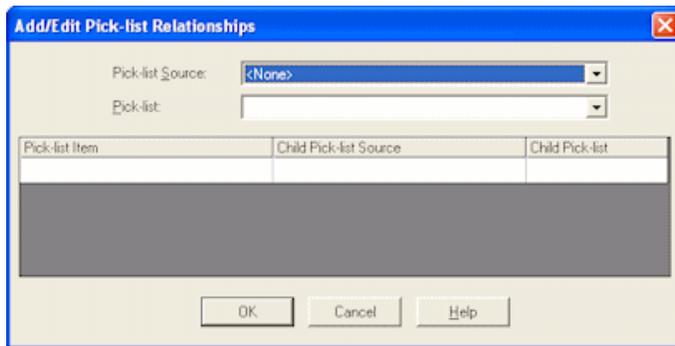


Display this screen by choosing **Pick-list Relationships** from the Admin menu and selecting or adding a pick-list relationship profile. To add a relationship profile, click the **New** (sun) button in the toolbar.

Element	Description
Pick-list Relationship Profile Name	Displays the name assigned to the profile. Enter a new name, if needed.
Relationship Hierarchy	Displays the hierarchy of two or more pick-lists linked in the profile.
Add	Click to link pick-lists in the <a href="#">Add/Edit Pick-list Relationships Screen</a> .
Edit	Click to make changes to a selected pick-list hierarchy in the <a href="#">Add/Edit Pick-list Relationships Screen</a> .
Delete	Click to delete the selected hierarchy from the profile.

### 13.12.1 Add/Edit Pick-list Relationships Screen

Use this screen to add or edit a pick-list relationship that links two previously created pick-lists. After identifying the parent pick-list and its source, you map the child pick-list to be displayed when the user selects each item in the parent pick-list.



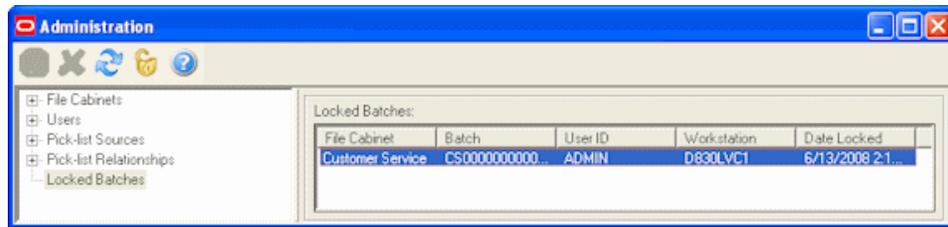
Display this screen by choosing **Pick-list Relationships** from the Admin menu, selecting a pick-list relationship profile and clicking **Add** or **Edit**.

Element	Description
Pick-list Source	Select the source of the parent pick-list. You can select Capture Native Pick-list or a specific database pick-list source.
Pick-list	Select the parent pick-list from those listed for the selected pick-list source.
Pick-list Item	This display only column lists pick-list values in the selected parent pick-list.
Child Pick-list Source	Select the source of the pick-list to be displayed when the parent pick-list item is selected.
Child Pick-list	Select the pick-list to be displayed when the parent pick-list item is selected.

### 13.13 Locked Batches Screen

Use this screen to view user activity and, if needed, unlock a batch.

To display this screen, choose **Locked Batches** from the Admin menu.



The table lists current Capture users by ID and workstation, along with the file cabinet and batch they are accessing.

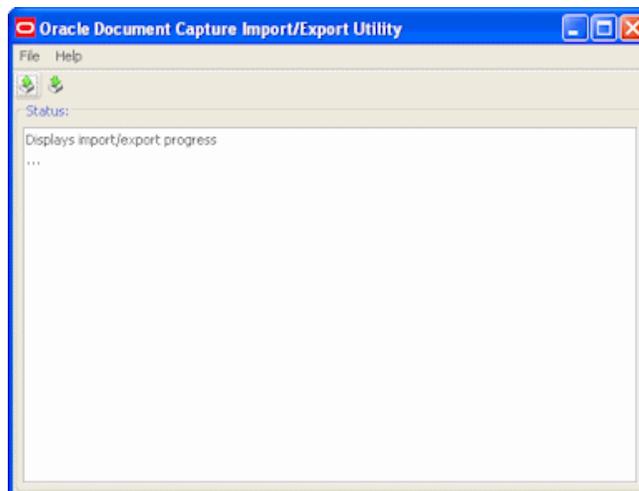
Element	Description
Unlock Batch	Unlocks the selected batch.
Refresh	Loads the list of batches in use again.

### 13.14 Import/Export Utility Screen

The Import/Export Utility includes the following screens:

- Main screen (shown below)
- "Specify Export Settings Screen" on page 13-66
- "Elements To Be Imported Screen" on page 13-66

Use this screen to import or export Capture elements. For more information, see "About the Import/Export Utility" on page 2-15.

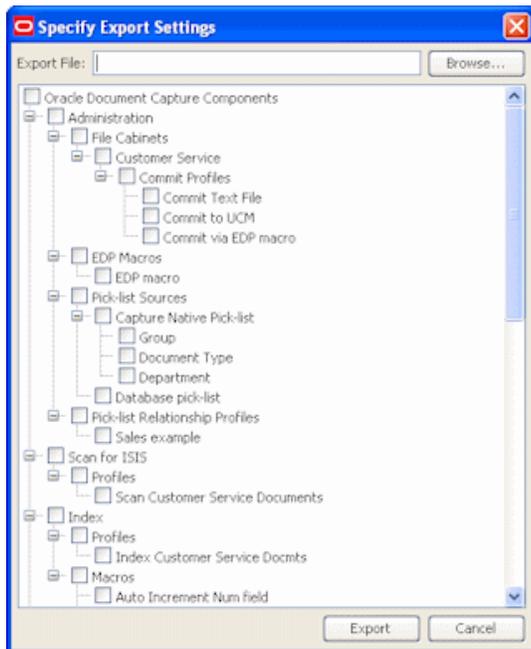


To display this screen, choose **Oracle Document Capture** from the Start menu, then choose **Import-Export Utility**.

Element	Description
	Select Capture elements for export from a tree view of all Capture components, then specify a name and location for the export file.
	Review and import a previously exported zipped file containing Capture elements.

### 13.14.1 Specify Export Settings Screen

Use this screen to select the elements for each component to export.

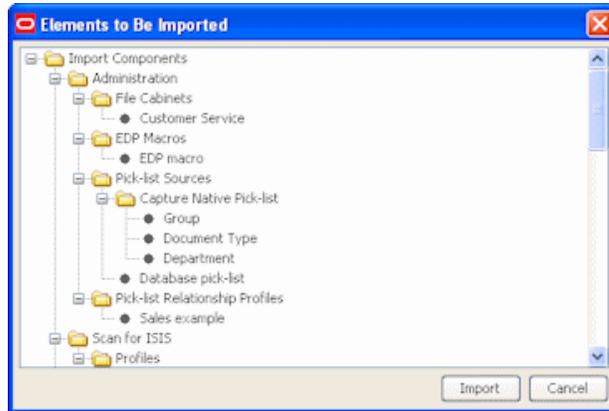


To display this screen, click the **Export** button (Ctrl+E) in the [Import/Export Utility Screen](#).

Element	Description
Export File/Browse	Click <b>Browse</b> and specify a location and name for the export file to be written.
Oracle Document Capture Components	For each component, select elements to export to the specified export file. For example, select Index to select all index profiles and macros for export, or click an individual index profile to export.  Because all file cabinet-related elements are exported and imported together, be sure to export all file cabinet elements to retain for the file cabinet at the same time. Importing any exported file cabinet element (such as a database lookup profile) overwrites the entire file cabinet of the same name.
Export	Begin writing the export file, using selected settings.
Cancel	Exit the screen without exporting or saving changes.

### 13.14.2 Elements To Be Imported Screen

Use this screen to import a previously exported file containing Capture elements.



To display this screen, click the **Import** button (Ctrl+I) in the [Import/Export Utility Screen](#).

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**Caution:** Before importing, it is recommended that you back up the corresponding Capture elements in the target system.

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Element	Description
Import Components	Lists all Oracle Document Capture components contained in the export file for import.
Import	After reviewing elements to be imported, click this button to import them into Oracle Document Capture.  Note that importing any exported file cabinet element (such as a database lookup profile) overwrites the entire file cabinet of the same name. Before importing, ensure that you are importing all file cabinet elements needed. If not, export again before importing.
Cancel	Exit the screen without importing Capture components.



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## Auditing in Oracle Document Capture

Oracle Document Capture audits certain activities and saves the information in the ecAudit table in the Capture database.

You can use audit information to create reports using a third-party reporting application. For example, you might build a custom report that gives the total number of pages scanned per day by all users, by file cabinet. This would allow you to compare the output of scanning users.

This section covers the following topics:

- ["ecAudit Table"](#) on page 14-1
- ["Scan for ISIS Activity IDs"](#) on page 14-2
- ["Scan for Adrenaline Activity IDs"](#) on page 14-4
- ["Index Activity IDs"](#) on page 14-3
- ["Commit Server Activity IDs"](#) on page 14-5
- ["Recognition Server Activity IDs"](#) on page 14-5
- ["Import Server Activity IDs"](#) on page 14-6

### 14.1 ecAudit Table

**Table 14–1** ecAudit Table

Column Name	Data Type	Field Length	Description
ecDate	Integer	4	Date the activity occurred.
ecTime	Integer	4	Time the activity occurred.
ecUserID	Text	20	User ID of the person who performed the activity.

**Table 14–1 (Cont.) ecAudit Table**

Column Name	Data Type	Field Length	Description
ecProcessID	Text	20	Process name or tool that is logging the activity. Applicable IDs include: <ul style="list-style-type: none"> <li>■ Indexing</li> <li>■ Scan for ISIS</li> <li>■ Scan for Adrenaline</li> <li>■ Oracle Document Capture Import Server</li> <li>■ Oracle Document Capture Recognition Server</li> <li>■ Oracle Document Capture Commit Server</li> <li>■ Batch Manager</li> </ul>
ecActionID	Number	4	Activity ID of the activity being logged. This number is relevant only for the process or tool logging the activity.
ecActionDesc	Text	225	Description of the activity.
ecFileCabinet	Text	50	File Cabinet affected by the activity.
ecBatch	Text	50	Batch affected by the activity.
ecBatchID	Long Integer	4	Internal ID assigned to the batch.
ecActionDataInt	Long Integer	4	If the activity produces an integer result, that result is saved here.
ecActionDataFloat	Floating Point	8	If the activity produces a floating-point value result, that result is saved here.
ecActionDataText1	Text	255	If the activity produces a text result, that result is saved here.
ecActionDataText2	Text	255	Miscellaneous information about the activity.
ecActionDataText3	Text	255	Miscellaneous information about the activity.
ecActionDataText4	Text	255	Miscellaneous information about the activity.
ecActionDataText5	Text	255	Miscellaneous information about the activity.
ecErrorNum	Integer	4	Error number for auditing errors.
ecErrorDesc	Text	255	Error Description.

## 14.2 Scan for ISIS Activity IDs

All scanning and indexing audit information is tracked in the same table. This section describes which activities Scan audits and reports in the fields above.

In the "[ecAudit Table](#)" on page 14-1, Date, UserID, FileCabinet, and Batch are automatically filled in for each activity. The ecActionDataText1 field always contains the scan profile name for each activity. The following table describes the remaining data elements for Scan audit activity.

**Table 14–2 Scan for ISIS Activity IDs**

Activity ID	Description	ecActionDataInt	ecActionDataText2
1	Create Batch	Number of pages scanned	N/A
2	Append Pages	Number of pages appended (added)	N/A
3	Insert Pages	Number of pages inserted	N/A
4	Replace Page	Page number replaced	N/A
5	Delete Batch	Number of pages deleted	N/A
6	Delete Page	Page number deleted	N/A
7	Update Batch Note	N/A	Note text
8	Print Image	N/A	Page number printed
11	Update Batch Status	N/A	New status
12	Update Batch Priority	New priority	N/A
13	Commit Profile	Number of documents committed	Internal identifier
15	Rename Batch	N/A	Original batch name
100	Reviewed Batch	Number of pages viewed	N/A
101	Scan Preview	N/A	N/A
102	Scanner Settings Opened	N/A	N/A
103	Create Scan Profile	N/A	N/A
104	Update Scan Profile	N/A	N/A
105	Delete Scan Profile	N/A	N/A

## 14.3 Index Activity IDs

All scanning and indexing audit information is tracked in the same table. This section describes which activities Index audits and reports in the fields listed in the previous table.

In the "[ecAudit Table](#)" on page 14-1, Date, UserID, FileCabinet, Batch and BatchID are automatically filled in for each activity. The ecActionDataText1 field always contains the index profile name for each activity. The ecActionDataFloat field contains the total number of documents committed for activity ID 10.

**Table 14–3 Index Activity IDs**

Activity ID	Description	ecActionDataInt	ecActionDataText2
5	Delete Batch	Total pages in batch	N/A
6	Delete Page	N/A	Page(s) deleted
7	Update Batch Note	N/A	Note text
8	Print Image	N/A	Page number or range printed
9	Copy Image	N/A	Page number or range copied

**Table 14–3 (Cont.) Index Activity IDs**

Activity ID	Description	ecActionDataInt	ecActionDataText2
10	Commit Batch	Total number of pages committed	Total number of pages in the batch at the time of commit
11	Update Batch Status	N/A	New status
12	Update Batch Priority	New priority	N/A
13	Commit Profile	Number of documents committed	Internal identifier
15	Rename Batch	N/A	Original batch name
200	Create New Index Profile	N/A	N/A
201	Update Index Profile	N/A	N/A
202	Delete Index Profile	N/A	N/A
203	Modify Zones	N/A	N/A
204	Select Batch	Total pages in Batch	N/A
205	Rotate Image	Page number rotated	N/A

## 14.4 Scan for Adrenaline Activity IDs

All scanning and indexing audit information is tracked in the same table. This section describes which activities Scan audits and reports in the fields above.

In the "[ecAudit Table](#)" on page 14-1, Date, UserID, FileCabinet, Batch and BatchId are automatically filled in for each activity. The ecActionDataText1 field always contains the scan profile name for each activity. The following table describes the remaining data elements for Scan audit activity:

**Table 14–4 Scan for Adrenaline Activity IDs**

Activity ID	Description	ecActionDataInt	ecActionDataText2
1	Create Batch	Number of pages scanned	N/A
2	Append Pages	Number of pages appended (added)	N/A
3	Insert Pages	Number of pages inserted	N/A
4	Replace Page	Page number replaced	N/A
5	Delete Batch	Number of pages deleted	N/A
6	Delete Page	Page number deleted	N/A
7	Update Batch Note	N/A	Note text
8	Print Image	N/A	Page number printed
11	Update Batch Status	N/A	New status
12	Update Batch Priority	New priority	N/A
13	Commit Profile	Number of documents committed	Internal identifier
15	Rename Batch	N/A	Original batch name
100	Reviewed Batch	Number of pages viewed	N/A
101	Scan Preview	N/A	N/A

**Table 14–4 (Cont.) Scan for Adrenaline Activity IDs**

Activity ID	Description	ecActionDataInt	ecActionDataText2
102	Scanner Settings Opened	N/A	N/A
103	Create Scan Profile	N/A	N/A
104	Update Scan Profile	N/A	N/A
105	Delete Scan Profile	N/A	N/A

## 14.5 Commit Server Activity IDs

This section describes the activities Commit Server audits and reports.

In the "ecAudit Table" on page 14-1, Date, UserID, FileCabinet, and Batch are automatically filled in for each activity. The following table describes the remaining data elements for Commit Server audit activity:

**Table 14–5 Commit Server Activity IDs**

Activity ID	Description	ecActionDataInt	ecActionDataFloat	ecActionDataText2
10	Commit Batch	Number of pages committed	Number of documents committed	Number of pages at time of commit

## 14.6 Recognition Server Activity IDs

This section describes the activities Recognition Server audits and reports.

In the "ecAudit Table" on page 14-1, Date, UserID, FileCabinet, and Batch are automatically filled in for each activity. The ecActionDataText1 field typically contains the batch job name for each activity. The following table describes the remaining data elements for Recognition Server audit activity:

**Table 14–6 Recognition Server Activity IDs**

Activity ID	Description	ecActionDataInt	ecActionDataText2	ecActionDataText1	ecActionDataFloat
7*	Update batch note	N/A	Updated note	N/A	N/A
11	Update batch status	N/A	Updated status	N/A	N/A
12	Update batch priority	Updated priority	N/A	N/A	N/A
500	Process batch	Number of pages processed	N/A	N/A	N/A
501**	Finish batch	Number of pages remaining after batch job completed	Name of first error batch	Name of the batch job	N/A
10	Commit batch	Total pages committed	N/A	N/A	Total documents committed

\* Can be done only using a macro.

\*\* TEXT3 = Number of pages in first error batch. TEXT4=Number of pages in second error batch.

## 14.7 Import Server Activity IDs

This section describes the activities Import Server audits and reports.

In the "[ecAudit Table](#)" on page 14-1, Date, UserID, FileCabinet, and Batch are automatically filled in for each activity. The ecActionDataText1 field always contains the profile name for each activity. The following table describes the remaining data elements for Import Server audit activity:

**Table 14–7** *Import Server Activity IDs*

<b>Activity ID</b>	<b>Description</b>	<b>ecActionDataInt</b>	<b>ecActionDataText2</b>	<b>ecActionDataFloat</b>
1	Create Batch	Number of pages imported	N/A	N/A
10	Commit Batch	Number of uncommitted pages	Number of pages in batch	Number of documents committed

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



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