Oracle® Distributed Document Capture

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Administrator's Guide for Oracle Distributed Document Capture, Release 10*g*R3

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Preface

This guide contains information to administer the Oracle Distributed Document Capture application.

Audience

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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Oracle Distributed Document Capture Overview

This guide describes how to administer Oracle Distributed Document Capture's browser-based remote scanning and indexing application.

This section covers the following topics:

1.1 About Oracle Distributed Document Capture

Oracle Distributed Document Capture provides scanning and optional indexing at remote locations using the Internet or a corporate intranet. It is comprised of these components:

- The *client*, which is automatically downloaded and installed as soon as users connect to the server. Running entirely in the user's web browser, it uses the industry standard TWAIN interface to capture documents from desktop scanners or other TWAIN compliant input devices.

  In the client, users scan or import documents in batches, review and index them, then send them to the server. Users scan and index documents using settings administrators save in scan profiles they create in the *Profile Administration* application.

- The *server*, which runs as a service and processes batches received from clients. Documents are committed (archived) so they can be accessed in the content management system. Documents are committed using settings saved in a commit profile.

- The *Capture Administration* component, which provides a centralized area for administrators to manage file cabinets, index fields, users, commit profiles, pick-lists, and database lookups. See "Capture Administration Overview" on page 2-1 for overview information.

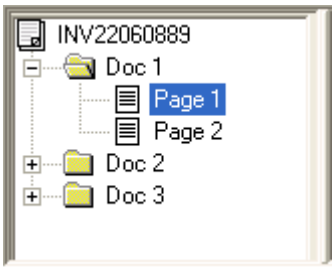
- The optional *Batch Manager* component, which allows administrators to view all Capture batches located in the primary Capture database.

Oracle Distributed Document Capture supports VBScript for customizing application functionality. See the *Developer's Guide for Oracle Distributed Document Capture* for information about developing VBScripts for Oracle Distributed Document Capture.

1.2 About Batches, Documents, and Pages

In Oracle Distributed Document Capture, users scan groups of pages in *batches*, using settings saved by an administrator in a *scan profile*. A batch is divided into one or more *documents*, and each document contains one or more *pages*. Figure 1–1 displays a batch's tree view in the client's Review/Index screen. This batch contains three documents, each with one or more pages.

Figure 1–1 Tree View of Batch



How Documents Are Used

In addition to visually dividing pages, documents are integral to indexing. When indexing, index values users specify on one page apply to all pages in the document. After the batch is sent, all pages with the same index values are archived (committed) as a single document.

If you do not include indexing in the scan profile, batches contain one document only. Typically, these batches are indexed and divided into documents later using another application such as Oracle Document Capture.

How Documents Are Created

Documents are created during scanning or importing based on profile settings. For example, if a profile is configured for separator sheet scanning, Oracle Distributed Document Capture creates a new document each time it encounters a separator sheet. Similarly, if a profile is configured for two-page, duplex scanning, Oracle Distributed Document Capture creates a new document after scanning each two-page document. See "About Scanning" on page 1-3 for more information.

Users can make changes to documents when reviewing and indexing them. For example, they can move pages between documents as needed, and add, copy, paste, and remove documents. (A batch must always contain at least one document.)

About Sending Batches

Batches are temporarily stored while users review, edit, and index them. If needed, users can attach notes to batches, and assign batches a priority from 0 to 10 or an administrator-defined status. When users send batches, any notes and status and priority information are also sent for an administrator to view.

Batches whose scan profile includes indexing must be fully indexed before they can be sent. See "About Indexing" on page 1-6 for more information. Once sent, batch results are displayed, and batches are removed from their temporary location.

About Scan Profiles and Settings

Scan profiles contain the main settings used to scan, import, and index batches. However, users can change default system settings that affect scanning, importing,

and indexing. For example, users can select duplex scanning, identify an automatic document feeder, or set images to be automatically straightened (deskewed).

1.3 About Scanning

Oracle Distributed Document Capture can be used in the following ways:

Scan remotely, index centrally

For example, using this method, remote offices scan invoices they receive using the client and send them to corporate. The accounts payable clerks at corporate headquarters index the invoices into the accounting system using another indexing application, such as Oracle Document Capture Index. Batches received by the server can also be automatically indexed using bar code recognition technology such as Oracle Document Capture Recognition Server.

Scan and index remotely

With this method, a user in each office scans documents and keys indexes from image or paper using the client. When the documents are sent to the server, they are automatically committed into the designated content management system. Batches received by the server can also be committed using Oracle Document Capture Commit Server.

1.3.1 Scanning Settings

In the scan profile, you specify several scanning settings, such as the format, resolution, brightness, and contrast at which you want images scanned. In the client, users can modify certain settings. For example, they can set images to be automatically straightened (deskewed).

1.3.2 Scanning Types and Document Creation Options

When creating a scan profile, you choose one of these scanning types:

- "Scan Only" on page 1-3
- "Scan and Index Documents" on page 1-4
- "Scan and Index Batches" on page 1-4

The scanning type determines whether users enter index values and how documents are created within batches users create using the profile. Document Creation Options are special options available for the *Scan and Index Batches* type only.

1.3.2.1 Scan Only

Choose the *Scan Only* type when you want users to scan or import documents that do not need to be indexed using the client. When users scan a batch using a Scan Only profile, the client scans all papers loaded in the scanner (or auto document feeder) and lists the new batch in the Client screen.

A Scan Only batch may actually include many documents, but all the pages are grouped into a single document for review purposes. Users can add pages but not documents to them. No indexing fields appear.

Note: Document Creation Options do not apply to Scan Only type profiles.

1.3.2.2 Scan and Index Documents

Choose the *Scan and Index Documents* type when you want users to scan documents that contain a variable number of pages, and to index each document immediately after scanning it.

When users scan a batch using a Scan and Index Documents profile, the client scans all papers loaded in the scanner's auto document feeder and automatically displays the new batch in the Review/Index screen for reviewing and indexing.

Scan and Index Documents batches are created with one document, but users can add documents and pages to them. Indexing fields appear.

Note: Document Creation Options do not apply to Scan Only type profiles.

1.3.2.3 Scan and Index Batches

Choose the *Scan and Index Batches* type when you want users to scan all documents in a batch first, and then perform post-batch indexing of the documents. Documents can be defined within the client, or blank pages can be used to automatically separate and define documents. The client scans all papers loaded in the scanner (or auto document feeder) and lists the new batch in the Client screen.

Batches scanned using a *Scan and Index Batches* profile typically contain multiple documents. The selected Document Creation Option determines how documents are created. Indexing fields appear.

Document Creation Options

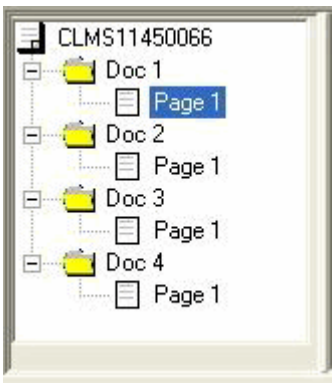
Document creation options for *Scan and Index Batches*-type scan profiles include:

- "One page (simplex)" on page 1-4
- "Two page (duplex)" on page 1-5
- "Variable Number of Pages (separator sheets)" on page 1-5
- "Prompt User" on page 1-6

1.3.2.3.1 One page (simplex)

This option creates one-page documents, and is typically used with single-sided documents. When users scan a batch, the client inserts each scanned image as a page in its own document, as shown in Figure 1–2.

Figure 1–2 Simplex Documents Batch

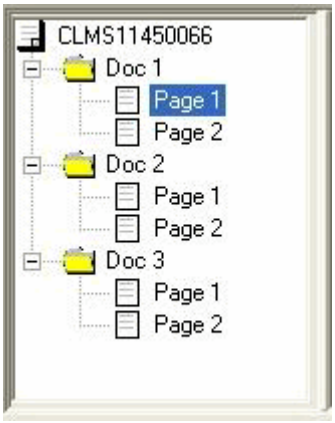


Note: The scanner's simplex/duplex setting determines whether it scans one or both sides of a page. If the profile is set to one page (simplex), the client creates one-page documents, regardless of the simplex/duplex setting on the scanner.

1.3.2.3.2 Two page (duplex)

This option creates two-page documents, and is typically used with two-sided (duplex) documents, such as forms with two sides. When users scan a batch, the client inserts two scanned images in a document, as shown in Figure 1–3.

Figure 1–3 Duplex Documents Batch



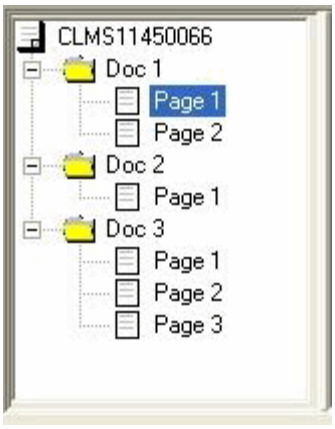
Note: The scanner's simplex/duplex setting determines whether it scans one or both sides of a page. If the profile is set to two page (duplex), the client creates two-page documents, regardless of the simplex/duplex setting on the scanner.

1.3.2.3.3 Variable Number of Pages (separator sheets)

This option creates documents with a variable number of pages.

- If users insert separator sheets (blank pages) between documents, the client scans all pages until it detects a blank page, in which case it starts a new document, scans all pages until the next blank page, and so on. The client discards the separator sheet pages, and places all the documents in a single batch, as shown in Figure 1–4.

Figure 1–4 Variable Documents Batch



- If users do not insert blank page separator sheets between documents, the client scans all pages in the scanner into a single document in the batch. After scanning, users can define documents using the Create New Document option.

1.3.2.3.4 Prompt User

Each time users begin scanning, this option prompts them to specify how they want documents created for the batch. Users choose one page, two pages, or variable number of pages.

1.4 About Indexing

A scan profile set for indexing contains all the indexing settings for users to index batches of documents. A profile's scanning type determines whether indexing is included, as described in "Scanning Types and Document Creation Options" on page 1-3.

Configuring indexing involves selecting the index fields you want users to complete. You can then apply properties to the index fields that determine how users complete them, as described in "About Index Field Types" on page 1-6. For example, you can make an index field required, automatically populate it with a value such as a date, or allow only numbers to be entered.

1.4.1 About Index Field Types

This section describes special index field types.

Pick-list Index Fields

A pick-list provides users with two or more values from which to choose. You create pick-lists in Capture Administration, then select them in the scan profile. For more information about pick-lists, see "About Pick-lists" on page 2-3.

Linked Pick-list Index Fields

You can create relationships (links) between pick-list index fields. In a pick-list 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, if a user selects *Accounting* from a parent index field called *Departments*, a linked child pick-list called *Document Type* might display accounting document types only.

You create pick-list relationship profiles in Capture Administration, then select the relationship profile and pick-lists in the scan profile. For more information about linked pick-lists, see "About Pick-list Relationships" on page 2-4.

Index Fields With Input Masks

An input mask is a filter that controls what users can enter into an index field. For example, a mask might allow users to type numbers but not alphabetic characters. If the user types a character that does not conform to the mask, the application does not accept it.

Index Fields That Format Input Values

An 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. For example, you might format a date field to a standard date format.

Auto Populated Index Fields

You can configure the scan profile 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 provide a default value for a field that the user could change if needed.

Index Fields Populated 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 the first part of 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 scan profile. For more information about database lookups, see "About Database Lookups" on page 2-5.

2

Capture Administration Overview

This section covers the following topics:

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, 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 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.

Oracle Distributed Document Capture provides additional login functionality through its authentication options. For information about whether users log in to Oracle Distributed Document Capture, see the section on understanding authentication in the *Installation Guide for Oracle Distributed Document Capture*.

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:

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.

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

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

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:

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.

> **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.

- 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 2-8. 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.)

> **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.

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.

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).

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 7-11.
- 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.

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.

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.)

> **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.

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.

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

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 2-11.

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.

> **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.

Note: COLD SQL applications are not supported.

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…).

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

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 7-31.

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.

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 2-10.

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.

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.

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.

   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.

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

   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.

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.

   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.

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

   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.

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

> **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.

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 7-49.

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.

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

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.

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.

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

3

Working With Scan Profiles

This section covers the following procedures:

3.1 Starting the Profile Administration Application

Follow these steps to start up the Profile Administration application, where you create profiles for users to select for scanning and indexing documents.

Note: You must be a Capture administrator.

1. Open the Oracle Distributed Document Capture Profile Administration application in your browser. The exact URL is determined at installation; the address is:

   `http://<servername>/<virtualdirectory>/WebCaptureAdmin.html`

   for example, `www.xyz.com/WebCapture/WebCaptureAdmin.html`

2. At the login page, enter your user ID and password and click **OK**. Scan profiles are displayed in the Scan Profiles pane.

3. To display profiles for a single file cabinet, select a file cabinet in the **Display Profiles For** field.

3.2 Adding a Scan Profile

Follow these steps to add a scan profile.

1. In the Profile Administration application, click the **Add** button on the toolbar in the Scan Profiles pane. A new profile called **<Scanning Profile 1>** is added.
2. Select **profile options** in the Scan Profiles pane and choose **settings** in the other pane.
3. Click **Save** to save changes. Click **Close** to exit Profile Administration.

3.3 Editing a Scan Profile

Follow these steps to make changes to a scan profile.

> **Note:** It is recommended that you do not make major changes to a scan profile after users have begun scanning batches using the profile. For example, if you add or remove some of a profile's index fields and users attempt to send batches they scanned before the change, errors will occur, since the data in the batch no longer matches the scan profile's settings. Instead, deactivate the profile until users have sent all batches, and then create a new scan profile. See "Deactivating and Activating Scan Profiles" on page 3-3.

1. In the Profile Administration application, select the profile you want to edit in the Scan Profiles pane.
2. Make changes to profile settings.

3.4 Copying a Scan Profile

Follow these steps to copy a scan profile. This is useful if you want to keep the original and make slight adjustments to a new one.

1. In the Profile Administration application, select the profile you want to copy in the Scan Profiles side pane.
2. Click the **Copy** button on the toolbar.
3. When prompted, enter a name for the new scan profile.

3.5 Deleting a Scan Profile

Follow these steps to delete a scan profile. When you delete a profile, it is no longer available to client users, and users can no longer display, edit or send batches they created using that profile.

> **Note:** Before deleting a profile, you may want to deactivate it for a period of time. See "Deactivating and Activating Scan Profiles" on page 3-3. When a profile is inactive, users can display, review, edit and send batches that use the profile but cannot use it to create new batches.

1. In the Profile Administration application, select a profile to delete in the Scan Profiles pane.
2. Click the **Delete** button on the toolbar. Confirm the deletion. The profile is removed from the list. It is also removed from the **Scan Profile** field displayed to users upon their next login to the client.

3.6 Deactivating and Activating Scan Profiles

Follow these steps to make a scan profile inactive or active.

Inactive scan profiles are displayed to client users in the scan profile list. However, the word *(Inactive)* is displayed after their names. Client users can review, edit, and send batches previously created with an inactive profile but cannot scan or import new batches.

1. In the Profile Administration application, select a scan profile from the Scan Profiles pane.
2. Under General options, choose **InActive** from the Current Profile State field to deactivate the profile or **Active** to activate it.
3. Save the profile.

3.7 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 does not accept it.

1. In the Profile Administration application, select a scan profile. The profile's scanning type must include indexing.
2. Click the **Field Properties** pane. From the **Field** option, select the index field to which you want to apply a mask.
3. In the **Field Validation Options** field, choose **Input Mask**.
4. In the **Input Mask** field that displays, enter any of the available mask characters (listed in Table 6–1). Any other characters you type are displayed exactly as typed.
5. Save the profile. Start the client and test the index field's mask as a user.

3.8 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, the client changes the data if needed to match the specified input format.

1. In the Profile Administration application, select a scan profile. The profile's scanning type must include indexing.
2. Click the **Field Properties** pane. From the **Field** option, select the index field to which you want to apply an input format.
3. In the Field **Validation Options** field, choose **Input Format**.
4. In the **Input Format** field that displays, select or type an input format (listed in Table 6–3). You can create custom character or numeric formats. See Table 6–4.
5. Save the profile. Start the client and test the index field's input format as a user.

3.9 Setting Up an Index Field Pick-list

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.

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 4-6.
2. In **Profile Administration**, select the scan profile for which you want to set up a pick-list. The profile's scanning type must include indexing.
3. Click the **Field Properties** options in the side pane. In the Field option, select an index field to which to apply a pick-list.
4. In the **Field** option, select an index field to which to apply a pick-list.
5. Select the **Case Insensitive** field to disregard case when users match pick-list items using the autocomplete feature. If this box is not checked, 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 the profile. Start the client and test the pick-list index field as a user.

3.10 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.

1. In **Capture Administration**, create two or more pick-lists, then create a pick-list relationship profile that links them. See "Working With Pick-lists" on page 4-6.
2. In **Scan Administratio**n, select the scan profile to which you want to apply a pick-list relationship. The profile's scanning type must include indexing.
3. In the side pane, click the **Document Indexing** options.
4. In the **Pick-list Relationship Profile** field, select the relationship profile.
5. In the side pane, click the **Field Properties** options.
6. Configure the parent field.
   a. In the **Field** option, select the parent field.
   b. In the **Pick-list Source** field, select the parent's source.
   c. In the **Pick-list** field, select the parent's pick-list.
7. Configure the child field.
   a. In the **Field** option, select the child field.
   b. In the **Parent** field, select the parent's index field.
8. Save the profile. Start the client and test the pick-list index fields as a user.

3.11 Setting Index Fields to Auto Populate

Follow these steps to configure a scan profile to automatically fill (populate) selected index fields with certain values.

1. In **Profile Administration**, select a scan profile. The profile's scanning type must include indexing.
2. In the side pane, select **Auto Populate** options.
3. In the **Available Fields** option, select an index field to auto populate.

   Note: Fields do not have to be selected for display in the Document Indexing options in order to be auto populated.

4. In the **Properties Type** field, select a system value. The options available depend on the data type of the field you selected.

3.12 Setting a Database Lookup to Search and Return Index Values

Follow these steps to apply a database lookup to a scan profile.

1. In **Capture Administration**, create a database lookup. See "Adding a Database Lookup" on page 4-11.
2. In **Profile Administration**, select a scan profile. The profile's scanning type must include indexing.
3. In the side pane, select **Database Lookup** options.
4. In the **Database Lookup Profile** field, select a database lookup profile to apply to the scan profile.
5. 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.
6. Save the profile. Start the client and test the database lookup as a user.

3.13 Testing Scan Profiles as a User

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

Follow these steps to scan a batch.

1. In the **Scan Profile** field on the Client Screen, select a scan profile.
2. Place the documents on the feeder tray of the scanner.
3. Click the **Scan** button.

   Oracle Distributed Document Capture begins scanning the documents. When done, the batch is added to the Existing Batches table and selected.

   Note: The batch may be immediately displayed in the Review/Index screen.

4. Click the **Review** button.
5. In the Review/Index Screen, review, edit, and index the batch.

4

Using Capture Administration

This section covers the following topics:

4.1 Managing File Cabinets and Index Fields

This section covers the following topics:

4.1.1 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.

4.1.2 Deleting a File Cabinet

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

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

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.

4.1.3 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**.

4.1.4 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.

4.2 Managing Users

This section covers the following topics:

4.2.1 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.

4.2.2 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.

4.2.3 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.

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.

4.2.4 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.

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

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.

4.3 Working With Batches

This section covers the following topics:

4.3.1 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.

4.3.2 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.

4.3.3 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.

4.3.4 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).

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

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.

4.3.5 Monitoring User Batch Activity

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

Note: In Oracle Distributed Document Capture, this information applies only to batches received by the server.

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.

4.3.6 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.

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

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.

4.4 Working With Pick-lists

This section covers the following topics:

4.4.1 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 2-3.

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.

   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.

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 4-7.

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.

4.4.1.1 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.

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

6. Click **Process**.

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

7. Click **Close**.

4.4.1.2 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.

4.4.2 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 2-3.

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 4-9.

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.

4.4.2.1 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.

   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.

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.

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

- 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.

4.4.3 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.

4.4.4 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.

   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.

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

4.5 Working With Database Lookups

This section covers the following topics:

4.5.1 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 4-9.

6. In the left pane, select the **Search Fields** heading. Identify the database fields to search for values matching those in Capture index fields.

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

   - 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.

4.5.2 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.

4.6 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:

4.6.1 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.)

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

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.

4.6.2 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.

   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.

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.

4.6.3 Importing Capture Elements

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

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.

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**.

> **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.

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.

5

Working With Commit Profiles

This section covers the following topics:

5.1 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 5-3
   - "Configuring an Oracle UCM 11g Commit Profile" on page 5-4
   - "Configuring an Oracle I/PM 10g Commit Profile" on page 5-7
   - "Configuring an Oracle I/PM 11g Commit Profile" on page 5-8
   - "Configuring a Text File Commit Profile" on page 5-10
   - "Configuring an EDP Commit Profile" on page 5-10
   - "Configuring a Database Commit Profile" on page 5-11

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 5-2.

5.2 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.

5.3 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.

5.4 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.

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.

5.5 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.

> **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.)

1. In the Capture Administration screen, create a commit profile.

   See "Adding a Commit Profile" on page 5-1.

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 5-3.

5. On the **Field Mappings** tab, specify how you want Capture index values written to Content Server fields during commit.

5.5.1 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 5-3
- "Based on Capture Index Values" on page 5-3
- "Based on User's Pick-list Selections" on page 5-4

5.5.1.1 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.

5.5.1.2 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.

5.5.1.3 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 2-3.

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.

> **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.

5.6 Configuring an Oracle UCM 11g Commit Profile

This section covers the following topics:

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

5.6.1 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 5-1.

   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.

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 5-5.

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.

5.6.2 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 5-5
- "Based on Capture Index Values" on page 5-6
- "Based on User's Pick-list Selections" on page 5-6

5.6.2.1 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.

5.6.2.2 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.

5.6.2.3 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.)

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

5.7 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 2-10.

> **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 5-1.

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 5-7.

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).

5.7.1 Configure Process Integration Options

Follow these steps to set up a Process integration.

> **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.

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.

5.8 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 5-8
- "Configuring an Input Agent Commit" on page 5-9

For more information, see "About the Oracle I/PM 11g Commit Driver" on page 2-11.

5.8.1 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 5-1.

   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.

5.8.2 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.

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 5-1.

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.

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.)

5.9 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 5-1.
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.

5.10 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 5-1.

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**.

5.11 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 5-1.

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 4-9.

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 5-11.

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).

> **Note:** To commit documents to an image/blob field, select a field whose data type supports long binary data.

5.11.1 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.

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.

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.

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.

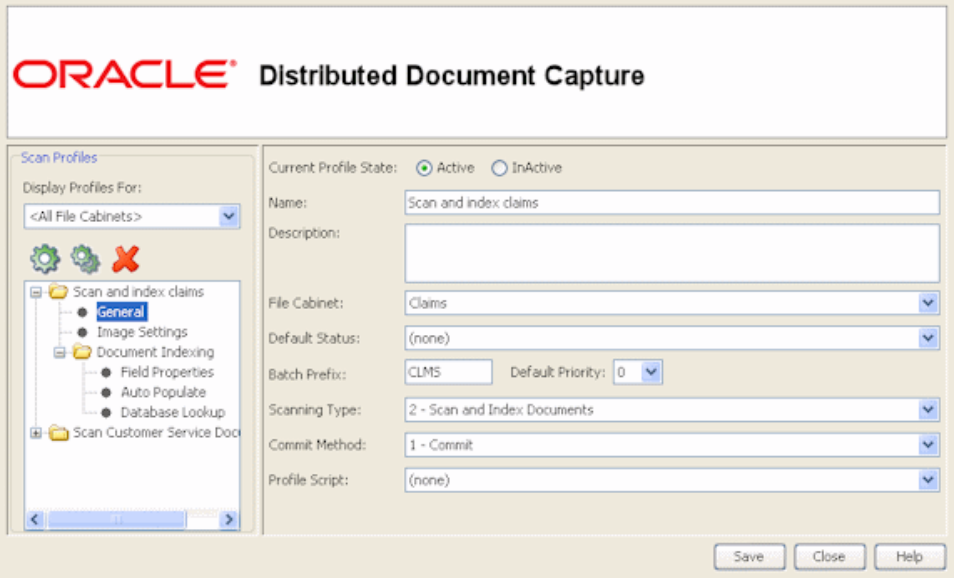
6

Oracle Distributed Document Capture User Interface

Oracle Distributed Document Capture has a number of user interface screens, including:

6.1 Profile Administration, General Screen

Use the General screen to apply general settings to a selected scan profile.



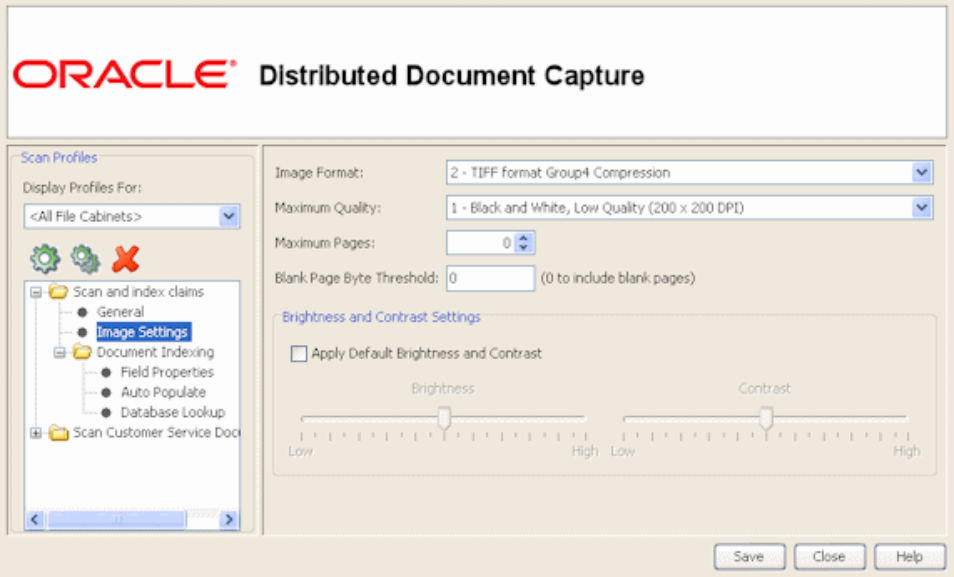
Display this screen by selecting a scan profile and clicking **General** in the Scan Profiles pane.

Element	Description
Scan Profiles	Use this area to select, add, duplicate, or delete scan profiles, and to select options for display in the main pane. Open the profile's folder and select its options. Note that Document Indexing options are not available for profiles with a Scanning Type of Scan Only.
Display Profiles For	Select a file cabinet to display its scan profiles only, or select <All File Cabinets> to display scan profiles for all file cabinets.
	Click to add a scan profile. If a file cabinet is selected in the Display Profiles For field, the file cabinet is automatically assigned to the new profile.
	Click to create a copy of the selected scan profile. After entering a profile name, the new profile is selected in the Scan Profiles pane.
	Click to delete the selected scan profile. You will be prompted to confirm the deletion. Deleting a profile makes it no longer available to client users, and users can no longer display, edit, or send batches they created using the profile. See the **Current Profile State** field to temporarily deactivate a profile before deleting it.
Current Profile State	Use this option to deactivate or activate a scan profile. When a scan profile is inactive, the word [Inactive] is displayed after the profile's name to users in the Scan Profile field in the client screen. By default, scan profiles are Active. When a profile is set to Inactive, users can use the profile (security permitting) to view and edit existing batches, but they cannot use it to create new batches unless its state is changed back to Active. This option is useful when you want to phase out a profile. After you deactivate it, users can complete and send batches that use the profile. After all batches have been sent, delete the profile.
Name	This field is required. Type a name for the scan profile. You can enter a name as long and descriptive as you want, and include spaces and special characters. Users select this name when choosing a scan profile in the client.
Description	Type instructions or a description for the user. This information appears in the Profile Description field in the client. For example, include special instructions regarding the type of documents being scanned, or explain how this profile creates documents.
File Cabinet	This field is required. Select the file cabinet in which images will be assigned within Capture. This field lists all file cabinets available. (File cabinets and their fields are defined in Capture Administration.) In Capture, users are assigned to file cabinets. Therefore, users can only see profiles that are assigned to file cabinets accessible to them. **Note:** Once a scan profile has been created and used, you should not change its file cabinet until all batches have been sent and processed by the server.

Element	Description
Default Status	From the list of available statuses, select a default status for batches created using this profile. (Statuses for the selected file cabinet are defined in Capture Administration.) Users can choose another status in the client. For example, you might set a default batch status of None, and a user might change a batch's status to Rush before sending it.
Batch Prefix	This field is required. Specify the prefix to be assigned to all batches created using the profile. The prefix can be up to eight characters long. For example, enter CLMS for Claims documents.
Default Priority	Select a default priority for batches created using this profile, by choosing a number from 0 to 10 (where 10 is highest priority). Users can change this priority in the client, by selecting or entering another number. For example, you might set a default priority of 5, and a user might upgrade a selected batch's priority from 5 to 10 before sending it.
Scanning Type	Use this option to specify whether client users index using the profile and how documents are created in batches. For more information, see "Scanning Types and Document Creation Options" on page 1-3. If indexing is included, you must select index fields. You specify if you want users to **scan only** (and not index the batches), **scan and index documents** one at a time, or **scan and index batches** (scan a batch of documents, then index them later).
Commit Method	Specify how you want indexed batches committed after users send them to the server. ■ Choose **Commit** if you want the server to commit them. ■ Choose **Do Not Commit** to leave them uncommitted in Capture. (Typically, these batches are later committed by another application.) ■ Choose **Use Commit Server** to commit them using the Oracle Document Capture Commit Server (recommended for committing).
Profile Script	Use this option to assign a VBScript to the profile, which extends client functionality. This field allows you to select a script from those stored in the Scripts folder beneath the virtual directory. For more information, see the *Developer's Guide for Oracle Distributed Document Capture*.
Save	Click to save changes to the selected scan profile.
Close	Click to save changes (if needed) and exit Profile Administration.

6.2 Profile Administration, Image Settings Screen

Use the Image Settings screen to apply image settings to a selected scan profile.



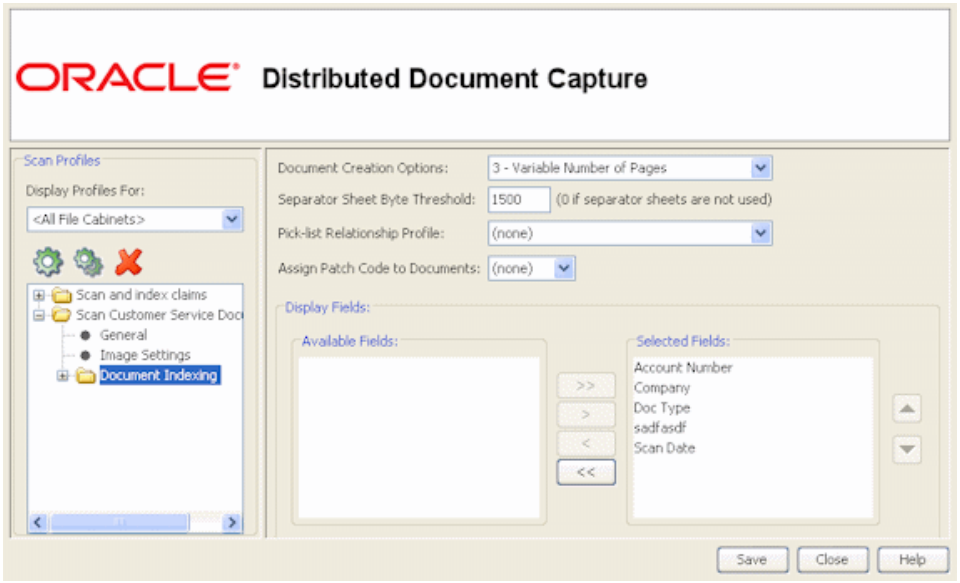
Display this screen by selecting a scan profile and clicking **Image Settings** in the Scan Profiles pane.

Element	Description
Image Format	Select the format in which images will be saved when users scan with this profile. Note that a commit profile can convert the image format.
Maximum Quality	Select the maximum color and image quality you want used when pages are scanned using this profile. Select from the color, grayscale, black and white and different resolution combinations. This field provides the maximum image quality allowed: If the user's scanner is set to a lower color and/or resolution, the user's settings will be used; if the user's scanner is set to a higher color and/or resolution, this maximum quality setting will be used.
Maximum Pages	Enter the maximum number of pages allowed in a batch for this profile. For example, enter 100 if you don't want batches to exceed this number of pages. If a user reaches this limit, a message will be displayed, warning the user that the maximum number of pages allowed was reached, and no more images will be saved in the batch. When the maximum pages has been reached, the user must create a new batch to continue scanning.
Blank Page Byte Threshold	Use this option to automatically delete blank pages from batches users scan. Oracle Distributed Document Capture 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, Oracle Distributed Document Capture 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. Client users can override the value you enter in the Blank Page Byte Threshold field by inserting a different value in the field highlighted below in the Settings dialog box.

Element	Description
Brightness and Contrast Settings	This feature allows you to set brightness and contrast settings in the profile. This can be useful if your organization has standardized on a particular scanner, and you want to control these settings for different types of documents. **Note:** Capture users can override the default settings using their scanner settings options. By default, this feature is disabled. When the box is checked, you can choose a brightness or contrast value from -1000 to 1000, where the default value is 0. **Note:** Not all TWAIN scanners respond to the default settings. It is recommended that you test default settings and standardize on a scanner, since the default settings could vary from one TWAIN scanner to another.

6.3 Profile Administration, Document Indexing Screen

Use this screen to specify the index fields users will complete and how documents will be created.

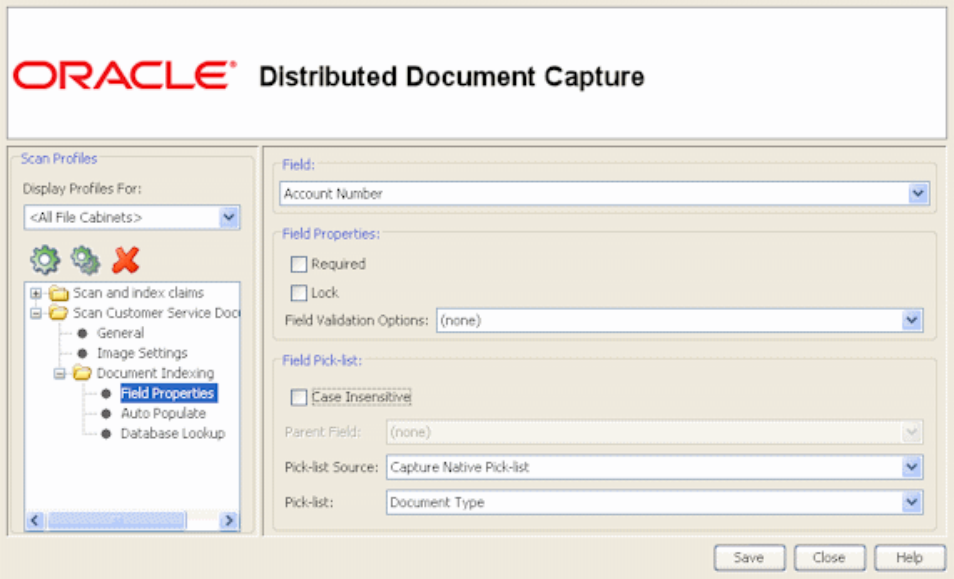


Display this screen by selecting a scan profile and clicking **Document Indexing** in the Scan Profiles pane. This screen is available when the selected scan profile has a scanning type of *2-Scan and Index Documents* or *3-Scan and Index Batches*, which both include indexing. (Scanning type is selected on the Profile Administration, General Screen.)

Element	Description
Document Creation Options	This field is displayed only when the Scanning Type field on the General pane is set to **3-Scan and Index Batches**.) Use these options to specify how documents are created when users scan using the profile. For example, the program can create documents containing one page or two pages. You can also specify a variable number of pages, so that the program creates documents with all pages found between separator sheets. Lastly, you can have users decide how documents are created, by prompting them each time they scan using the profile.
Separator Sheet Byte Threshold	Use this option to set the scan profile to detect separator sheets. When Oracle Distributed Document Capture encounters an image whose file size is less than or equal to the threshold value you specify in this field, it creates a new document and deletes the separator sheet. The recommended value is 1500; at this setting, Oracle Distributed Document Capture can usually differentiate between a blank separator page and a page with a small amount of text. This value may need to be adjusted to a higher value, depending upon the Image Format and Maximum Quality settings. 1500 is suggested for low quality, black and white TIFF format Group4 compression images. However, you will need to conduct scan testing to determine the value required. **Note:** In order for Oracle Distributed Document Capture to detect separator sheets, the Scanning Type field must be set to Scan and Index Batches and the Document Creation Options field must be set to either Variable Number of Pages or Prompt User. If other settings are selected in these fields, the Separator Sheet Byte Threshold field's setting has no effect. In addition, if **Prompt User** is selected in the Document Creation Options field, client users can override the separator sheet threshold you specify in this separator sheet field. The **Blank Page Byte Threshold** field also sets the threshold at which blank pages are detected; in that case, however, Oracle Distributed Document Capture deletes blank pages it detects, but does not treat them as separator sheets. Note that if both fields contain a value other than 0, the Separator Sheet Byte Threshold field overrides the Blank Page Byte Threshold field, which means that blank pages detected are used as separator sheets. However, if the Blank Page Byte Threshold value is higher than the Separator Sheet Byte Threshold value, pages whose bytes fall between the two values are deleted from the batch but are not used as separator sheets.
Pick-list Relationship Profile	Select a pick-list relationship profile to apply to the scan profile, if needed. For more information, see "About Pick-list Relationships" on page 2-4.
Assign Patch Code to Documents	When creating a Scan and Index documents or Scan and Index batches-type profile, you can select a patch code type. If a patch code is specified, the server assigns the selected patch code value to the first batch page of the document. When users index a batch imported by the Oracle Distributed Document Capture Service in Oracle Document Capture's Index component, they can navigate between document separators (assuming the feature is enabled in the index profile).
Available Fields, Selected Fields	The **Available Fields** box lists index fields defined in the file cabinet for the profile. The **Selected Fields** box lists index fields that have been selected for the profile. In the client, these selected fields appear in the Index area of the Review/Index screen.

6.4 Profile Administration, Field Properties Screen

Use this screen to specify how users will complete a selected index field. Select a field at the top and choose settings below it.



Display this screen by selecting a scan profile and clicking **Field Properties** from the Document Properties folder in the Scan Profiles pane. This screen is available when the selected scan profile has a scanning type of *2-Scan and Index Documents* or *3-Scan and Index Batches*, which both include indexing. (Scanning type is selected on the Profile Administration, General Screen.)

Element	Description
Required	Requires the user to enter or select a value in the index field. (By default, index fields are not required.) An asterisk appears before the index field's name in the client when it's required. In the client, users must index all documents within a batch before they can successfully send the batch to the server. To be indexed, at least one field must contain data, and *all required fields must contain values*. If any documents in a batch are NOT indexed, a message is displayed to users after the send process completes, informing them that the batches cannot be successfully sent until indexing is complete.
Lock	Select this field to make the index field locked. Locking a field prevents users from entering or changing its value. This setting is commonly used with a pick-list to ensure users select a pick-list item.
Field Validation Options	Use these options to affect how users enter or select values. You can choose None, Input Mask (see Table 6–1 and Table 6–2), or Input Format (see Table 6–3 and Table 6–4). You can define an input mask or a pick-list for a field, but not both.

Element	Description
Input Format	Enter an input format for the selected index field. This field is displayed only when Input Format is selected in the Field Validation Options field. Use this option to ensure that data entered by users matches a certain format. When the user moves to another index field, the client changes the data if needed to match the specified input format. (This is different from an input mask, which forces the user to enter the data before he or she can leave the index field.) See Table 6–3, " Input Formats" and Table 6–4, " Custom Input Formats".
Input Mask	Enter an input mask for the selected index field. This field is displayed only when Input Mask is selected in the Field Validation Options field. 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 into the field, or might limit the entry to four characters. If the user types a character that does not conform to the mask, the system beeps and the program doesn't accept it. For example, the mask can ensure that users enter Social Security numbers correctly. See Table 6–1, " Input Mask Characters" and Table 6–2, " Input Mask Examples".
Case Insensitive	Select this field to disregard case when users match pick-list items using the autocomplete feature. If this box is not checked, users must use the same case when typing the first few characters of a pick-list item.
Parent Field	Select a parent field for a Parent/Child pick-list. (This field is active only when you have selected a pick-list relationship profile in the Document Indexing options, as described in "Profile Administration, Document Indexing Screen" on page 6-5.)
Pick-list Source	Select the source you want to use for the selected field. If using a Capture pick-list, choose Native Capture Pick-lists. If using a database pick-list, choose the database pick-list source.
Pick-list	Select the pick-list you want displayed for the selected index 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 6–1, " Input Mask Characters" into the Input Mask field that displays. Any other characters you type are displayed exactly as typed.

Table 6–1 Input Mask Characters

Mask Character	Description
#	Requires a number to be entered.
.	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.

Table 6–1 (Cont.) Input Mask Characters

Mask Character	Description
:	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 6–2 lists examples of input masks.

Table 6–2 Input Mask Examples

Input Mask	Description	Example Format
###-##-####	Social Security Number	123-45-6789
##-???-##	Medium date	17-July-08
##-##-##	Short date	07-17-08
##:## ??	Medium time	03:15 PM

To configure an input format, choose Input Format in the Field Validation Options field, then select or type an input format into the Input Format field that appears. Table 6–3, " Input Formats" lists available input formats.

Table 6–3 Input Formats

Input Format	Description
Custom	Enter a custom format to be used. See Table 6–4.
Currency	Number with thousand separator, if appropriate, and two digits to the right of the decimal separator. Output is based on system locale settings.
General Date	A date and/or time. For real numbers, changes to a date and time; for example, 4/3/08 05:34 PM. If there is no fractional part, changes to only a date; for example, 4/3/03. 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.

Table 6–3 (Cont.) Input Formats

Input Format	Description
Medium Date	Date using the medium date format appropriate for the language version of the host application.
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 6–4, " Custom Input Formats".

Table 6–4 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 *HELLO* becomes *hello*

Table 6–4 (Cont.) Custom Input Formats

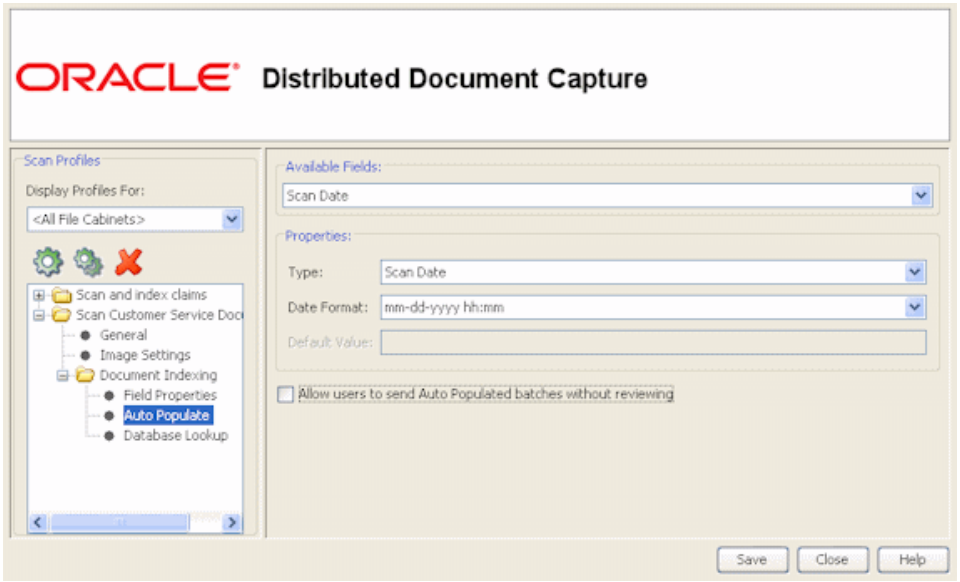
Character	Description
>	Force uppercase. Display all characters in uppercase format. Example: A user entry of *This is it* becomes *THIS IS IT*
!	Force left to right fill of placeholders. The default is to fill placeholders from right to left.
(0)	Digit placeholder. Display a digit or a zero. If the 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%
(,)	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.

Table 6–4 (Cont.) Custom Input Formats

Character	Description
(/)	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 minus sign next to negative exponents and 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 (")).

6.5 Profile Administration, Auto Populate Screen

Use this screen to set the application 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.



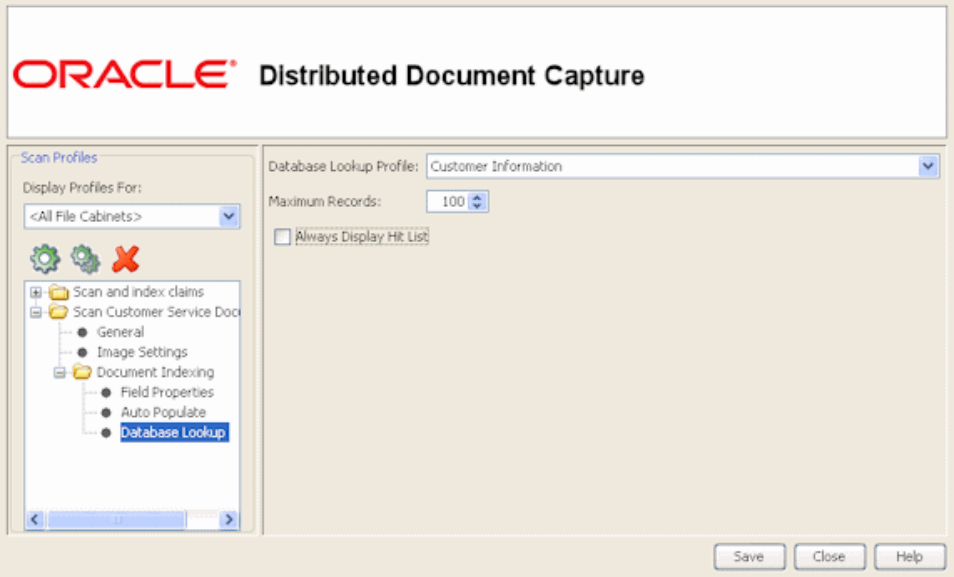
Display this screen by selecting a scan profile and clicking **Auto Populate** from the Document Properties folder in the Scan Profiles pane. This screen is available when the selected scan profile has a scanning type of *2-Scan and Index Documents* or *3-Scan and Index Batches*, which both include indexing. (Scanning type is selected on the Profile Administration, General Screen.

Fields do not have to be selected for display in the Document Indexing options in order to be auto populated.

Element	Description
Available Fields	Select the index field you want to auto populate. The Available Fields box lists all fields in the file cabinet, not just those selected for display to the user. Oracle Distributed Document Capture detects each field's data type, and displays available settings in the Properties area based on its type.
Properties Type	Select a system value. (The options available depend on the data type of the field you selected.) You can choose one of the following to be automatically entered into the selected index: ■ None (default): Select this option to turn the auto-populate option off for the selected field. ■ Scan Date: Enters the scan date, using the date format you select in the Date Format field. ■ Index Date: Enters the index date, using the date format you select in the Date Format field ■ Send Date/Time: Enters the date and time at which the batch was successfully sent to the server, using the date format you select in the Date Format field ■ Received Date/Time: Enters the date and time at which the batch was received by the server, using the date format you select in the Date Format field ■ Default Value: Enters the value you specify in the Default field ■ Batch Name ■ Batch Priority ■ Batch Status ■ Computer Name ■ Scan Profile Name ■ User ID: Enters the indexing user's ID. This can be helpful in determining which user indexed a document.
Allow users to send Auto Populated batches without reviewing	This field determines whether documents with autopopulated fields are considered indexed. ■ If selected, a document is considered indexed if any of its fields is autopopulated and no required fields have been left blank. This allows users to scan and send batches without opening and reviewing them. ■ If deselected, batches requiring indexing must be opened and reviewed before they can be sent.

6.6 Profile Administration, Database Lookup Screen

Use this to apply a database lookup profile to a selected scan profile. For more information about database lookups, see "About Database Lookups" on page 2-5.



Display this screen by selecting a scan profile and clicking **Database Lookup** from the Document Properties folder in the Scan Profiles pane. This screen is available when the selected scan profile has a scanning type of *2-Scan and Index Documents* or *3-Scan and Index Batches*, which both include indexing. (Scanning type is selected on the Profile Administration, General Screen.)

Element	Description
Database Lookup Profile	Select a database lookup profile to apply to the scan profile, if needed. You create database lookup profiles in Capture Administration.
Maximum Records	Contains the maximum number of records to appear in the hit list. If this field is set to 100 (the default) and a database contains 150 records that match a search field, the first 100 records will appear in the hit list
Always display hit list	Select this field if you want a hit list containing possible matching values displayed whenever the user activates a database lookup. If this box is not checked (the default), Capture displays a hit list only when more than one matching value is found.

6.7 Server Configuration Screens

Use the Server Configuration application to select or change server settings.

To activate this application from the Start menu, choose **Oracle Distributed Document Capture**, then choose **Distributed Document Capture Server Configuration**.

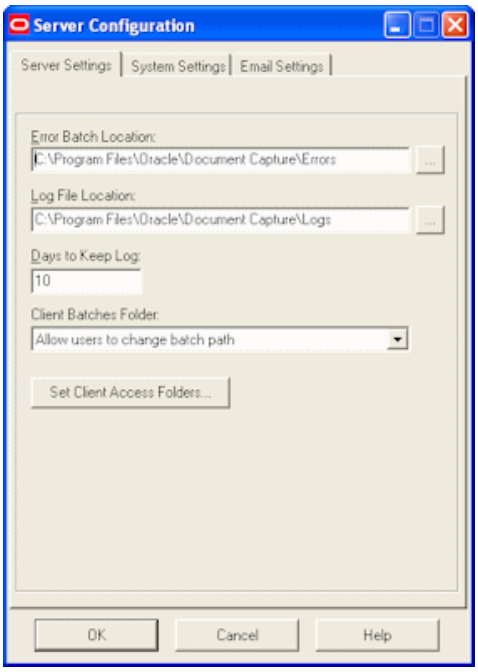
The Server Configuration application contains the following tabs and screens:

- "Server Configuration Screen, Server Settings Tab" on page 6-15
- "Client Access Folders Screen" on page 6-16
- "Server Configuration Screen, System Settings Tab" on page 6-17
- "Server Configuration Server, Email Settings Tab" on page 6-18

6.7.1 Server Configuration Screen, Server Settings Tab

Use the Server Settings tab to select server folders and options.

> **Note:** If you are configuring multiple virtual folders, copy the contents of the WebPages folder to each batch folder before setting the batch folders (see the Client Access Folders button).



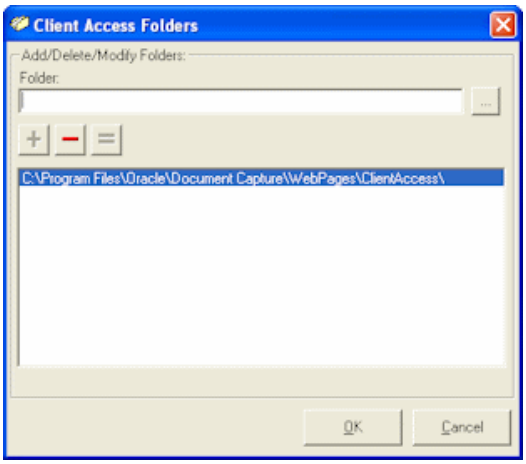
To display these options, choose **Oracle Distributed Document Capture** from the Start menu, then choose **Distributed Document Capture Server Configuration**.

Element	Description
Error Batch Location	Specify the folder in which batches containing errors are placed. If an error is encountered in server processing, the entire .pak file is transferred into this folder for analysis.
Log File Location	Specify the folder to which the server writes log files. The server logs detailed records on all processing activities. Each day's log file is titled using the format PPSmmddyyyy.log.
Days to Keep Log	Specify the number of days to retain the log files the server automatically generates. For example, type 14 to retain log files for two weeks. A value of 0 indicates that the log files will not be deleted.

Element	Description
Client Batches Folders	Specify where user batches are temporarily stored before they are sent to the server and whether client users can view and change this location under their Settings options. You can choose: ▪ **Allow users to change batch path** (default): Creates and stores documents in a Batches folder on the hard drive containing the most space (typically C:\Batches). This folder appears to client users in their Settings options, where they can designate a different folder, including a shared network folder. When users are allowed to change the batch path, they can change the batch folder to a network folder and share batches with a group of users. In this scenario, each time a user opens a batch, it is temporarily locked, preventing other users from opening the same batch. ▪ **Batches restricted to current workstation user**: Stores batches under the current user (creates a Documents and Settings\User Data\Application Data\WebCapture\Batches folder; this folder is often hidden.) Client users cannot see or change the location under Settings options. ▪ **Batches available to all workstation users**: Stores batches under all users (creates an All Users\Application Data\WebCapture\ Batches folder; this folder is often hidden.) Client users cannot see or change the location under Settings options.
Set Client Access Folders	Click to set one or more folders for storing batches in the Client Access Folders Screen.

6.7.2 Client Access Folders Screen

Use this screen to specify the folder in which scan profiles are stored and in which batches are temporarily stored when users send them from the client.

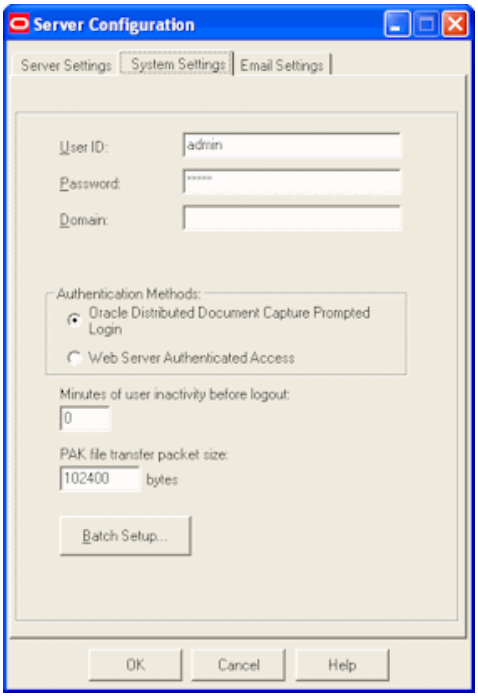


Display this screen by clicking the **Set Client Access Folders** button on the Server Configuration Screen, Server Settings Tab.

Element	Description
Folder	Click the Browse button to select a folder for client access. You must configure at least one client access folder. Each folder must refer to the subfolder beneath WebPages and must be accessible by your Internet/Intranet users (i.e., within an IIS virtual directory).
+, -, =	Click + to add the folder to the Client Access Folders list. Click - to remove a selected folder. Click = to replace the selected folder.
Client Access Folders	Lists folders configured for client access. If configuring multiple Capture systems, you can configure more than one client access folder.

6.7.3 Server Configuration Screen, System Settings Tab

Use the System Settings tab to select system settings.



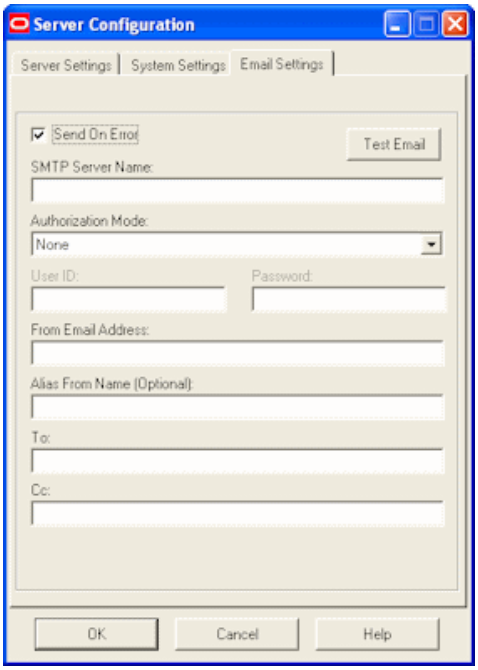
To display these options, choose **Oracle Distributed Document Capture** from the Start menu, then choose **Distributed Document Capture Server Configuration**. Click the System Settings tab.

Element	Description
User ID and Password	Specify a Capture administrator user name and password. This information enables the Oracle Distributed Document Capture service to log in to Capture.
Domain	If using Windows Domain security, enter the domain name with which the user is associated. (Leave this field blank if using Capture security.)

Element	Description
Authentication Methods	Specify how you want client users authenticated. You can choose Oracle Distributed Document Capture Prompted Login (default) to prompt users or Web Server Authenticated Access if you want users authenticated through IIS. For more information about authentication, see the *Installation Guide for Oracle Distributed Document Capture*.
Minutes of user inactivity before logout	To automatically log users out of the client after a period of inactivity, enter the number of minutes to elapse. (Inactivity, in this case, means no mouse activity, keyboard activity or sending of batches.) Note that configuring this option sets it globally for all client users for the server. After the specified time elapses, a message appears to users, warning them that they will be automatically logged out in 30 seconds and allowing them to continue using Oracle Distributed Document Capture. If the seconds count down to 0, the client user is disconnected from the server. If a batch is open, it is saved prior to closing.
PAK file transfer packet size	If needed, specify a different PAK file transfer packet size from the default 102,400 bytes. Packet size refers to the size of data chunks being transferred at a time and read into memory. You might increase this number to allow a small number of locations to more quickly send batches or decrease it to prevent overloading available memory. You can specify a packet size between 32,768 and 102,400 bytes.
Batch Setup	Click this button to change additional system settings. (These options function the same way on the server as they do in Capture.)

6.7.4 Server Configuration Server, Email Settings Tab

Use this tab's options to specify who should receive an email if the server encounters an error while performing processing. The subject of the error email is *Notification of Server Error*; it identifies the batch being processed when the error occurred and describes the error.



To display these options, choose **Oracle Distributed Document Capture** from the Start menu, then choose **Distributed Document Capture Server Configuration**. Click the Email Settings tab.

Element	Description
Send On Error	Select this field if you want an email sent if an error is encountered.
SMTP Server Name	Specify the name or IP address 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 and 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. The server verifies the SMTP settings you specified, and sends a test email to all users specified in the To and Cc fields.

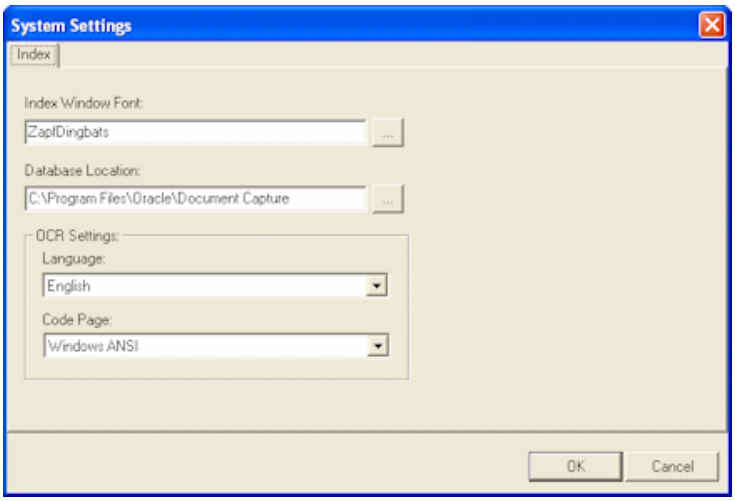
7

Capture Administration User Interface

This chapter contains information about the user interface for Capture Administration. The following screens are described in this chapter:

7.1 System Settings Screen

Use this screen to select index settings for this workstation. (This screen applies to Oracle Document Capture only.)

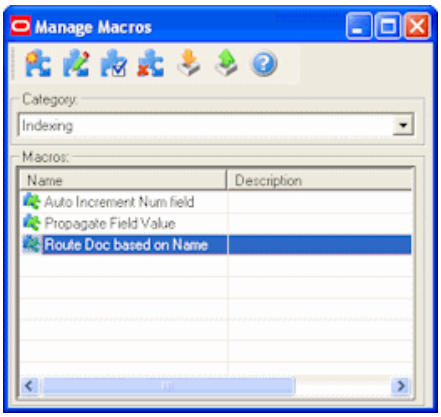


To display this screen, choose **Settings** from the System menu of Oracle Document Capture.

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 **Language** field, select the language in which you want OCR text captured. In the **Code Page** field, change the character set to be used for storing OCR text, if needed.

7.2 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.

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.

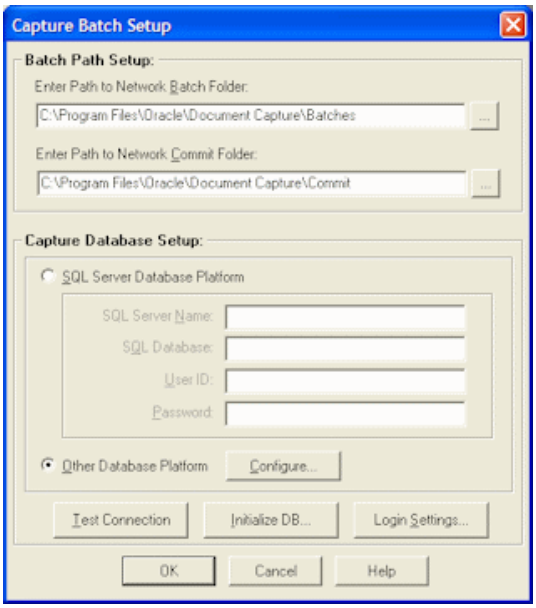
7.3 Capture Batch Setup Screen

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.

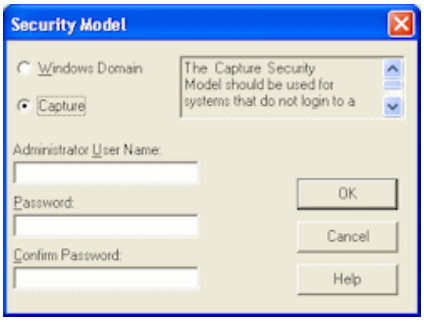
Element	Description
Enter Path to Network Commit Folder	Enter or select the folder's path. (Capture creates the folder if it doesn't already exist.) After a batch has been indexed and committed, the document index information and batch images are moved to this commit folder. This setting specifies the 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: ■ In the SQL Server Name field, enter the computer name of the SQL Server. ■ In the SQL Database field, enter the name of the SQL database an administrator created. ■ In the User ID and Password fields, enter a valid user id and password to communicate to the database server.
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. **WARNING:** 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.



7.4 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.

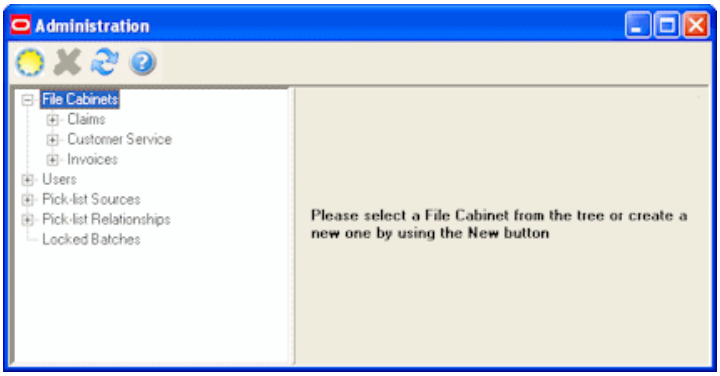


Element	Description
Windows Domain	Choose this model to use the current user's domain or domain group information for login and Capture rights. Depending on settings, users may or may not be required to log in each time they activate Capture. This method allows you to add groups to Capture to quickly 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 7-3). However, doing so erases all data in the database and recreates the database schema.

7.5 File Cabinets Screen

Use this screen to add, edit, or delete file cabinets. For more information, see "About File Cabinets" on page 2-1.

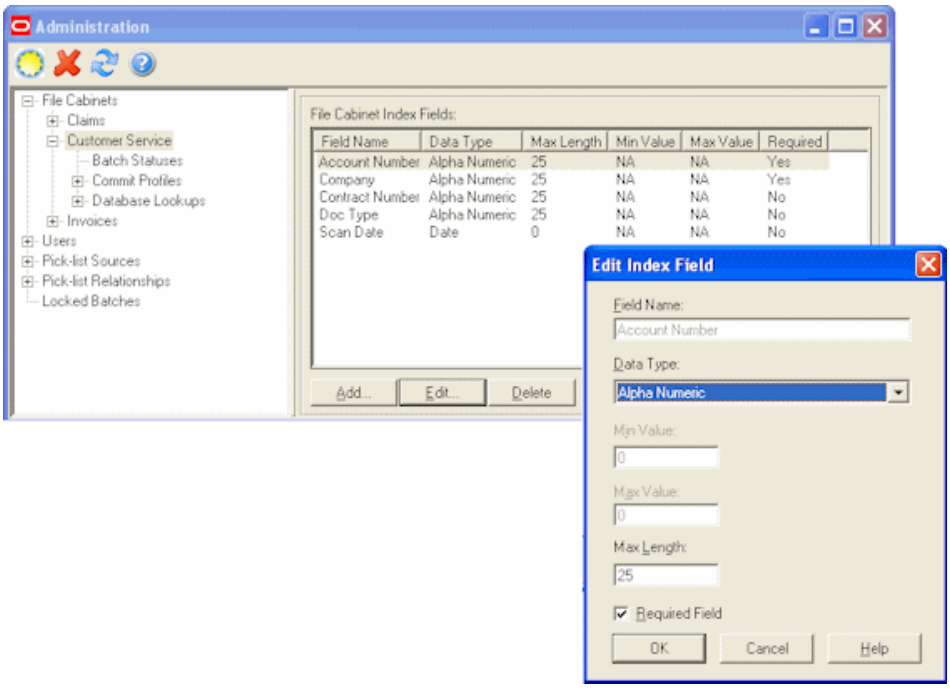


Display this screen by clicking **File Cabinets** from the Admin menu. File cabinets are listed below the File Cabinets heading in the side pane. Click a file cabinet's plus (+) sign to view its associated settings (batch statuses, commit profiles and database lookup profiles). Click a file cabinet to 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. **Caution:** 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.

7.6 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 Add/Edit Index Fields Screen.
Edit	Select an index field in the File Cabinet Index Fields list to edit it in the Add/Edit Index Fields Screen.
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.

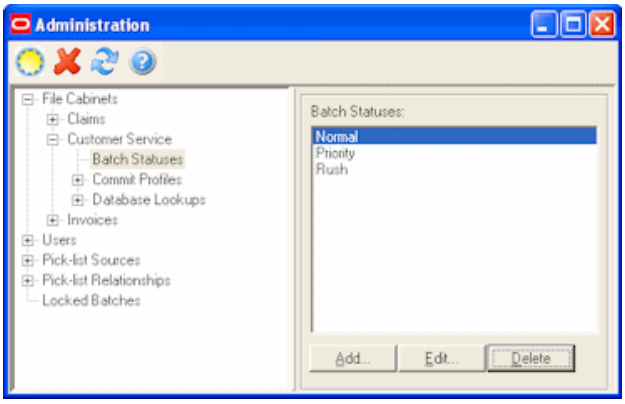
7.6.1 Add/Edit Index Fields Screen

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	Select this field to make the field required. Users must complete all required index fields before a document can be committed. ■ If users leave required fields blank in Oracle Distributed Document Capture, the batch cannot be sent.

7.7 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.

7.8 Commit Profiles

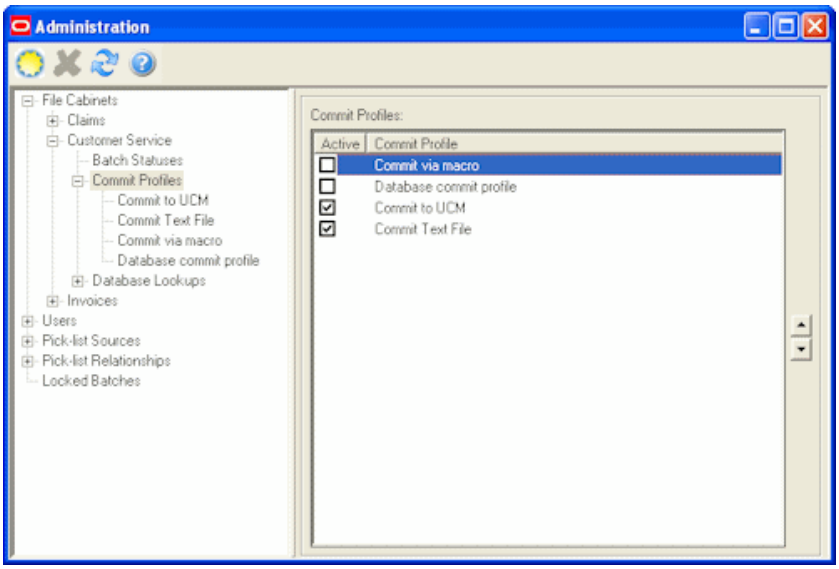
The Commit Profiles option includes the following screens:

- "Commit Profiles Screen" on page 7-9
- "Commit Profile Settings Screen" on page 7-9
- "Oracle UCM 10g Commit Settings Screen" on page 7-13
- "Oracle UCM 11g Commit Settings Screen" on page 7-19
- "Oracle I/PM 10g Commit Settings Screen" on page 7-28
- "Oracle I/PM 11g Commit Settings Screen" on page 7-39
- "Commit Text File Settings Screen" on page 7-42
- "Macro Selection Screen" on page 7-46

- "Database Commit Settings Screen" on page 7-47

7.8.1 Commit Profiles Screen

Use this screen to activate or deactivate commit profiles and order their processing.

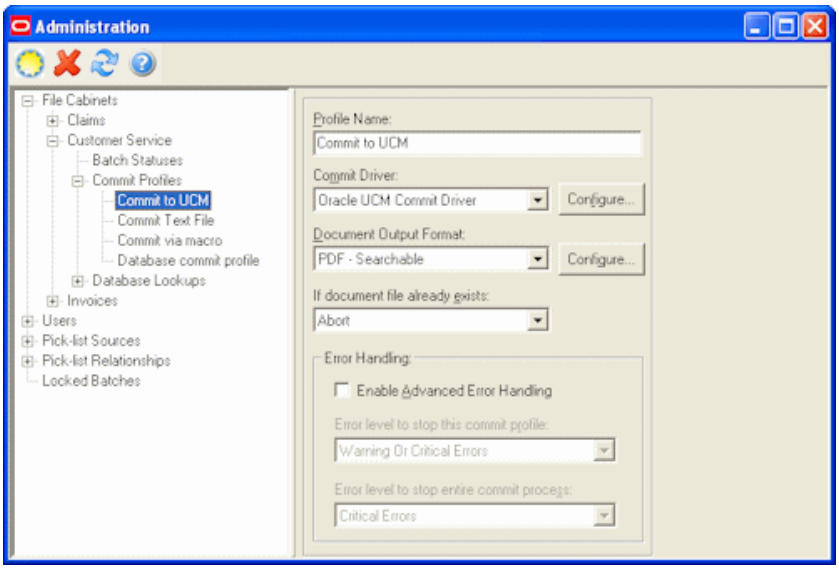


Display this screen by selecting the **Commit Profiles** heading in the side pane for a selected file cabinet.

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.

7.8.2 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 2-6.



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.

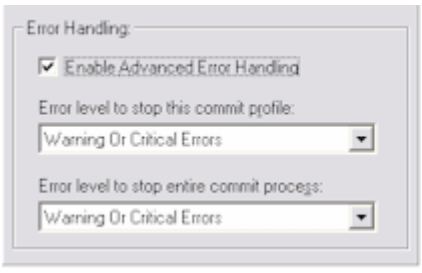
Element	Description
Profile Name	Displays the profile's name, which you can change.
Commit Driver, Configure	Specify the method by which you want documents committed. Click **Configure** to select driver settings. Depending on installation, drivers may include: ▪ **Oracle UCM Commit Driver**, which commits documents directly into Oracle UCM. For more information, see "About the Oracle UCM 10g Commit Driver" on page 2-9. ▪ **Oracle UCM 11g Commit Driver**, which commits documents directly into Oracle UCM 11g. For more information, see "About the Oracle UCM 11g Commit Driver" on page 2-10. ▪ **Oracle I/PM Commit Driver**, which commits documents into Oracle I/PM. For more information, see "About the Oracle I/PM 10g Commit Driver" on page 2-10. ▪ **Oracle I/PM 11g Commit Driver**, which commits documents into Oracle I/PM 11g. For more information, see "About the Oracle I/PM 11g Commit Driver" on page 2-11. ▪ **Commit Text File**, which writes a text file containing data about the committed images, such as index field values and batch information. For more information, see "About the Text File Commit Driver" on page 2-14. ▪ **Electronic Document Provider**, which uses a specified EDP macro to determine how documents are committed. For more information, see "About the Electronic Document Provider Commit Driver" on page 2-14. ▪ **Database Commit Driver**, 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 "About the Database Commit Driver" on page 2-14.

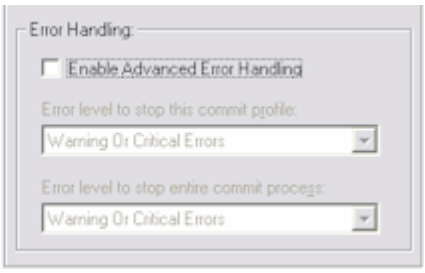
Element	Description
Document Output Format, Configure	Specify the format in which you want documents committed using this profile output. Click Configure to select export settings for the selected output format. By default, document images are committed in their native format. To convert them, choose a new format: ■ 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). ■ PDF (Searchable): Converts documents to PDF (portable document format) with text users can search. (Available for Oracle Document Capture only.)
If document file already exists	Specify what happens if a document file being committed already exists. You can choose Overwrite, Abort (default) or Append. **Note:** 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. 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, *Document file [full path to file] already exists, document commit has been aborted*.
Error Handling	Select the **Enable Advanced Error Handling** field to activate custom error handling according to the level you choose from its two options. For more information, see "About Commit Error Handling" on page 2-9 and "Error Handling Examples" on page 7-11. It is recommended that you not enable this setting.

7.8.2.1 Error Handling Examples

Below are examples of how error levels control the commit process if errors are encountered:

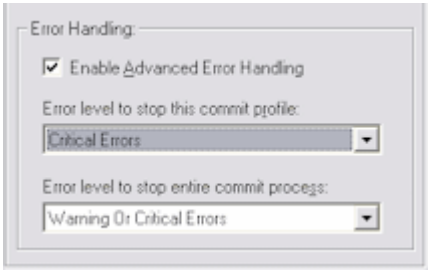
- If a warning or critical error occurs, cancel the commit process: To immediately cancel the commit process in the case of any error, set the error level for both the commit profile and the commit process to Warning or Critical Errors. Note that this is the default option, whether advanced error handling is activated or not.



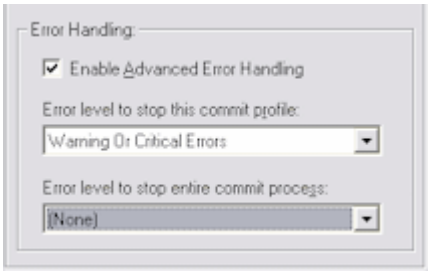


- If a warning error occurs, continue with the commit profile: In this case, the commit profile's error level is set to Critical Errors. If a Warning error occurs, the

document in which the error occurred is skipped, and the commit process proceeds to the next document for the commit profile.

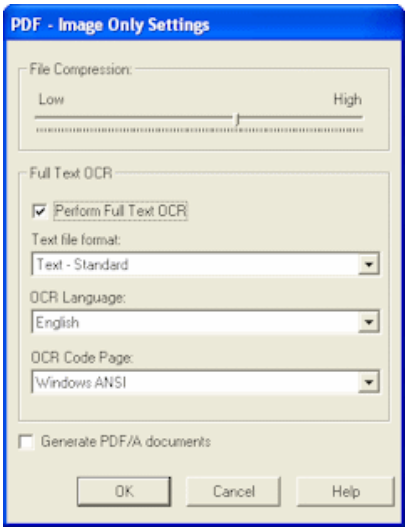


- If a warning or critical error occurs, cancel the current commit profile but proceed using the next commit profile: Setting the commit process error level to None means that, regardless of the error, Capture proceeds to the next commit profile.



7.8.2.2 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.

Note: The Full Text OCR options apply to Oracle Document Capture, but not Oracle Distributed Document Capture.

Element	Description
Perform Full Text OCR	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. **Note:** 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.
Text file format	Select a format for the OCR text file. The available options are: ■ (None) No text file will be created. (This is the default setting.) ■ Text - Standard ■ Text - Smart ■ Text - Stripped ■ Text - Plain ■ Text - Comma Delimited ■ Text - Tab Delimited ■ Rec ASCII (Formatted) ■ Rec ASCII (Standard) ■ Rec ASCII (StandardEx)
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 **PDF-Image Only** 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 *(None) No text file will be created* skips creating the text file.

7.8.3 Oracle UCM 10g Commit Settings Screen

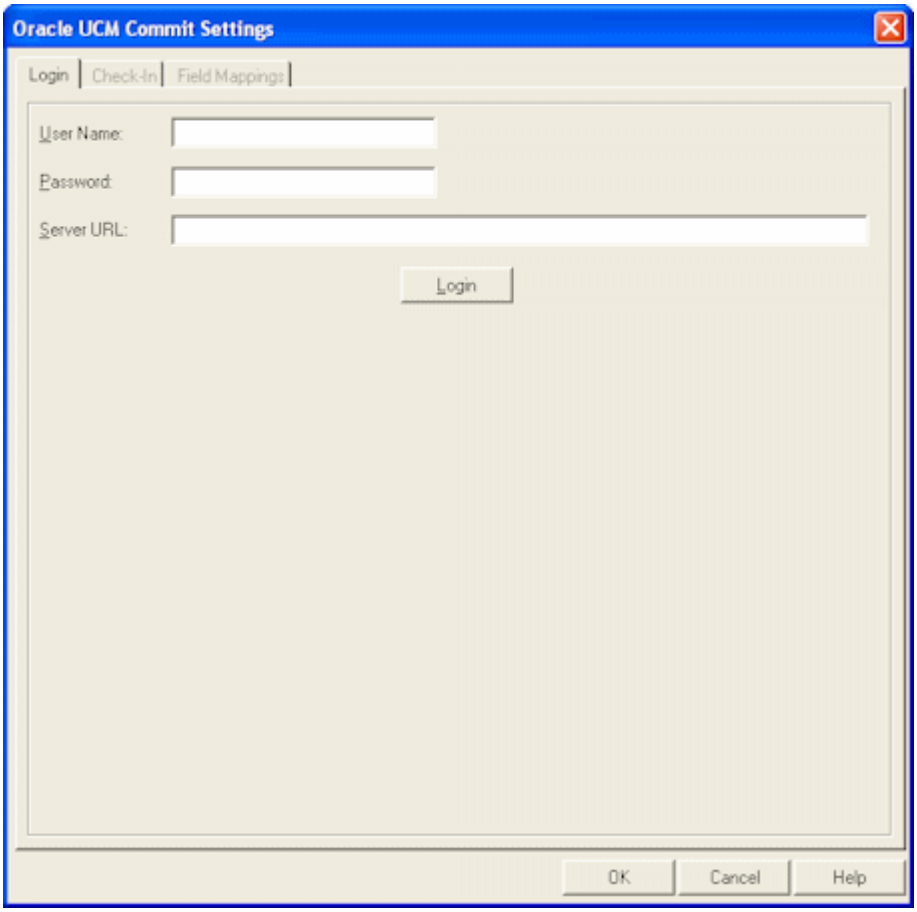
Use this screen to configure an Oracle UCM commit profile, which commits documents directly into Oracle UCM. Display this screen by creating a commit profile,

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 7-14
- "Oracle UCM Commit Settings Screen, Check-In Tab" on page 7-15
- "Oracle UCM Commit Settings Screen, Add Metadata Mappings" on page 7-16
- "Oracle UCM Commit Settings Screen, Title Builder" on page 7-17
- "Oracle UCM Commit Settings, Field Mappings Tab" on page 7-18

7.8.3.1 Oracle UCM Commit Settings Screen, Login Tab

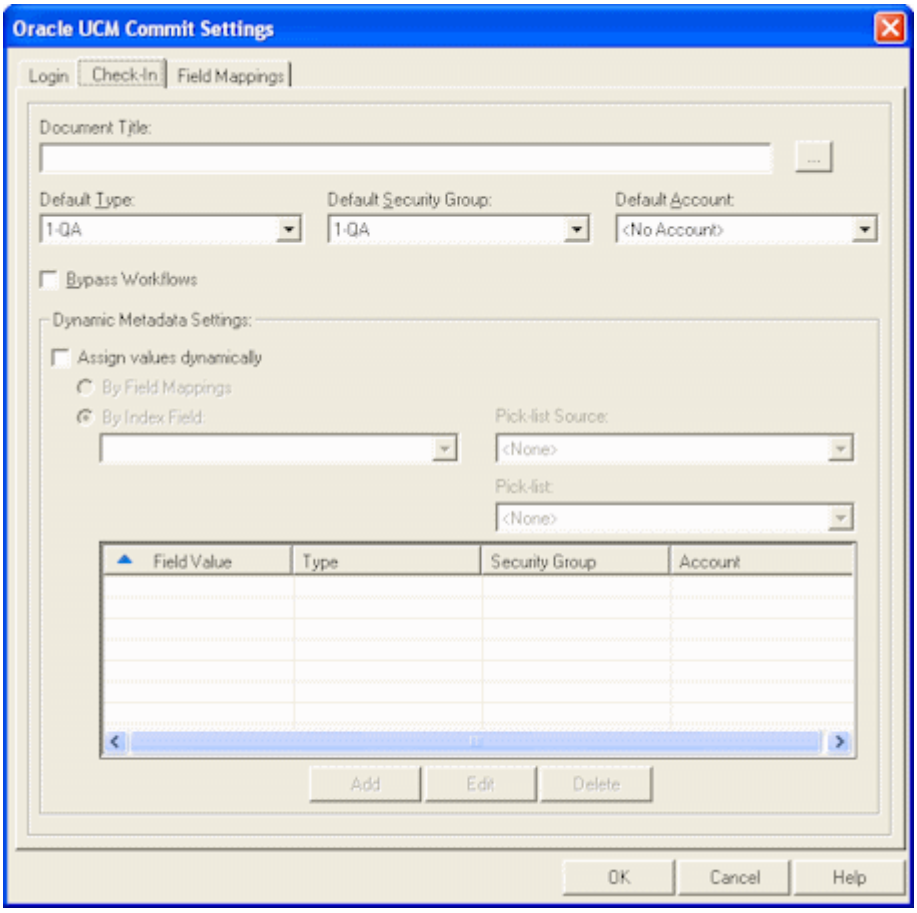
Use the Login tab to specify Oracle UCM login information. When the user commits in Capture with the Oracle UCM commit driver active, Capture will commit to Oracle UCM.



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.

7.8.3.2 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.

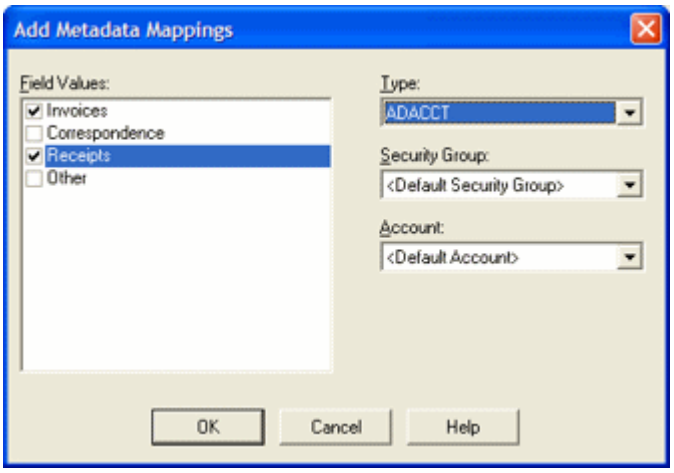


Element	Description
Document Title	Specify how you want the committed documents named in Oracle UCM. Also see "Oracle UCM Commit Settings Screen, Title Builder" on page 7-17.
Default Type	Select the Oracle UCM category to which you want the documents committed. For example, you might choose from departments 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 "Oracle UCM Commit Settings, Field Mappings Tab" on page 7-18.
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 "Oracle UCM Commit Settings Screen, Add Metadata Mappings" on page 7-16.
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.

7.8.3.3 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.

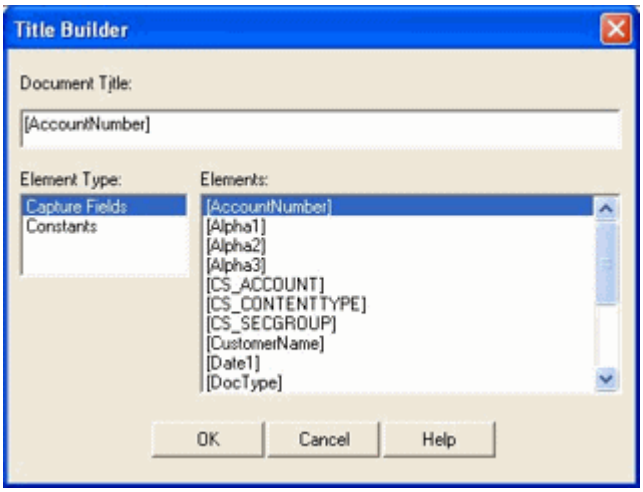


Display this screen by selecting dynamic metadata settings on the Check-In tab of the Oracle UCM 10g Commit Settings Screen and clicking **Add**.

Element	Description
Field Values	Lists values in the pick-list not already mapped. Select one or more field values.
Type	Select a type for the selected field values. For example, if the document type is Invoices or Receipts, the Type might be Accounting. If you select <Default Type>, 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. The Type, Security Group, and Account fields each contain a default option (as in <Default Security Group>). If <Default Security Group> is selected, the value shown in the Default Security Group field on the Check-In tab is used.
Security Group	Choose a group for the selected field values. If you select <Default Security Group>, 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.
Account	Select an account for the selected field values. If you select <Default Account>, 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.

7.8.3.4 Oracle UCM Commit Settings Screen, Title Builder

Use this screen to specify how you want the committed documents named in Oracle UCM.



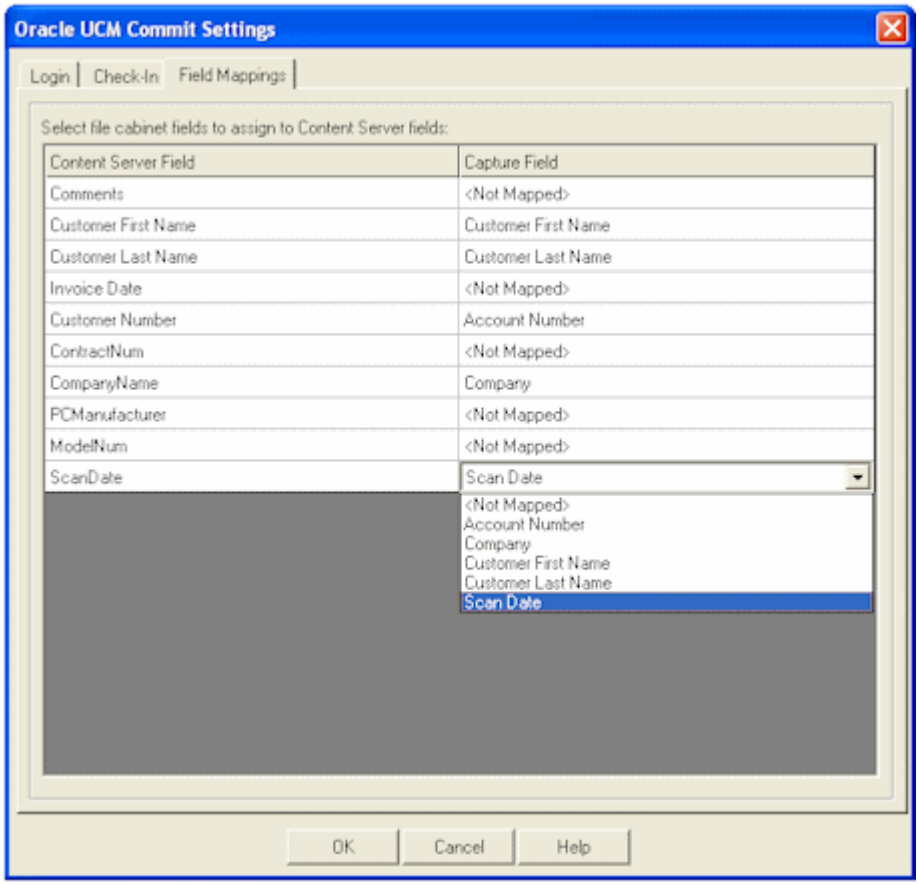
Display this screen by clicking the **Browse** button adjacent to the **Document Title** field on the Check-In tab of the Oracle UCM 10g Commit Settings Screen.

Element	Description
Document Title	Build the title in this field. You can include the following elements: ▪ Literal characters: Enter alphanumeric characters in the Document Title field. ▪ Capture fields ▪ Constants (spaces or dashes)
Element Type	Select the type of element you want to add to the document title. Choose **Capture Fields** to add a Capture index field from those available in the profile's file cabinet. Choose **Constants** to add a dash or space.
Elements	Double-click a Capture field or constant to add it to the document title.

7.8.3.5 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.

7.8.4 Oracle UCM 11g Commit Settings Screen

Use this screen to configure an Oracle UCM 11g commit profile, which commits documents directly into Oracle UCM.

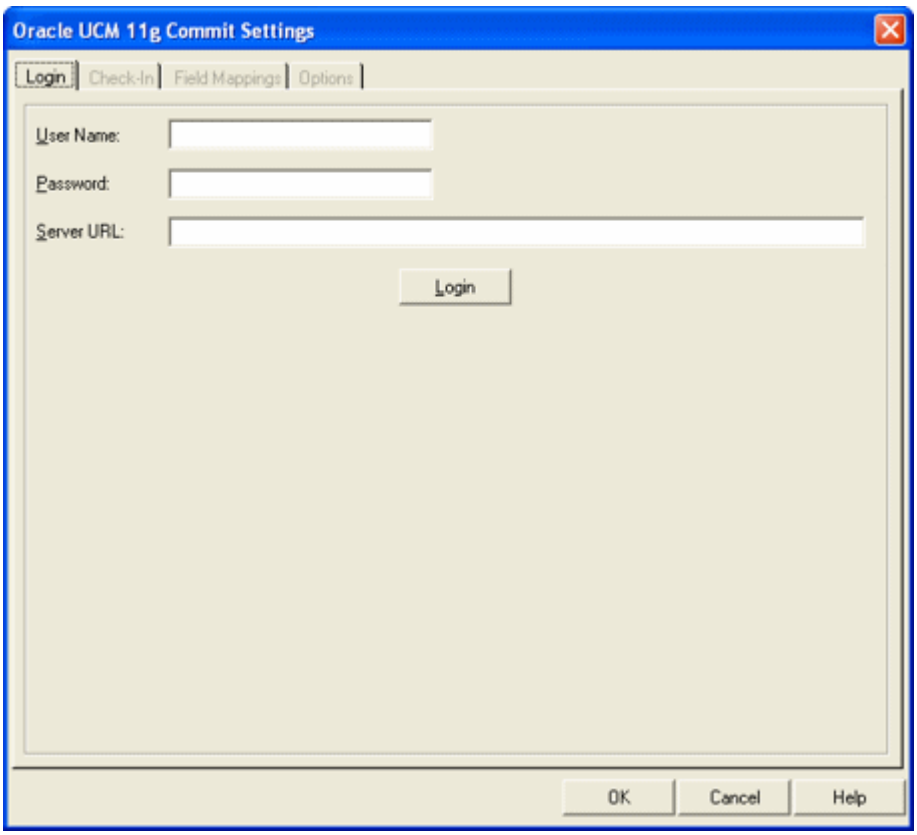
Display this screen by creating a commit profile, selecting **Oracle UCM 11g Commit Driver** in the Commit Driver field, and clicking **Configure** to configure driver settings.

Select settings on these tabs and screens:

- "Oracle UCM 11g Commit Settings Screen, Login Tab" on page 7-20
- "Oracle UCM 11g Commit Settings Screen, Check-In Tab" on page 7-20
- "Oracle UCM 11g Commit Settings Screen, Add Metadata Mappings" on page 7-22
- "Oracle UCM 11g Commit Settings Screen, Title Builder" on page 7-23
- "Oracle UCM 11g Commit Settings Screen, Field Mappings Tab" on page 7-24
- "Oracle UCM 11g Commit Settings Screen, Add/Edit Custom Fields" on page 7-25
- "Oracle UCM 11g Commit Settings Screen, Options Tab" on page 7-26

7.8.4.1 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.

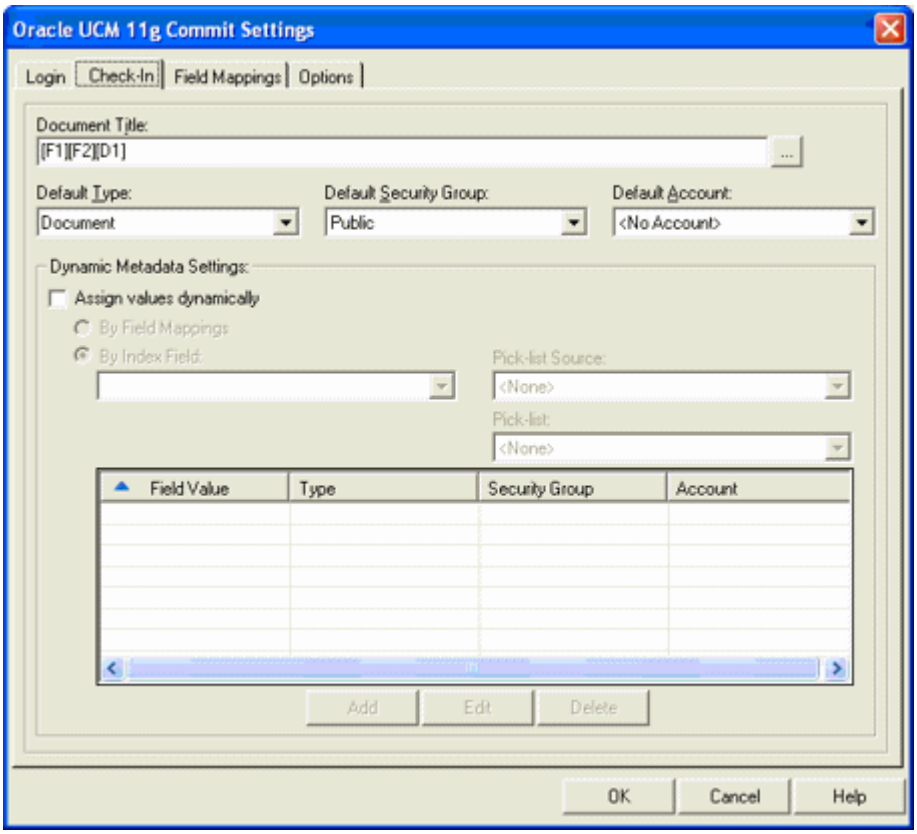


To display this screen, open a commit profile in Capture Administration, select **Oracle UCM 11g Commit Driver** in the Commit Driver field, and click the adjacent Configure button.

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: `http://svr-ucm/idc/idcplg`
Login	Click this button to log Capture into Oracle UCM and authenticate the user. After a successful login, the other tabs become available.

7.8.4.2 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.



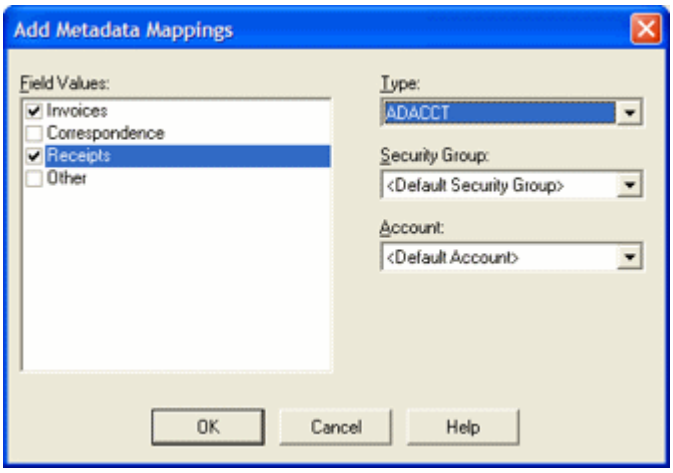
To display this screen, open a commit profile in Capture Administration, select **Oracle UCM 11g Commit Driver** in the Commit Driver field, click the adjacent Configure button, and click the Check-In tab.

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 "Oracle UCM 11g Commit Settings Screen, Title Builder" on page 7-23.
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 "Oracle UCM 11g Commit Settings Screen, Field Mappings Tab" on page 7-24.
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 **Capture Native Pick-list** 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 "Oracle UCM 11g Commit Settings Screen, Add Metadata Mappings" on page 7-22.
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.

7.8.4.3 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.

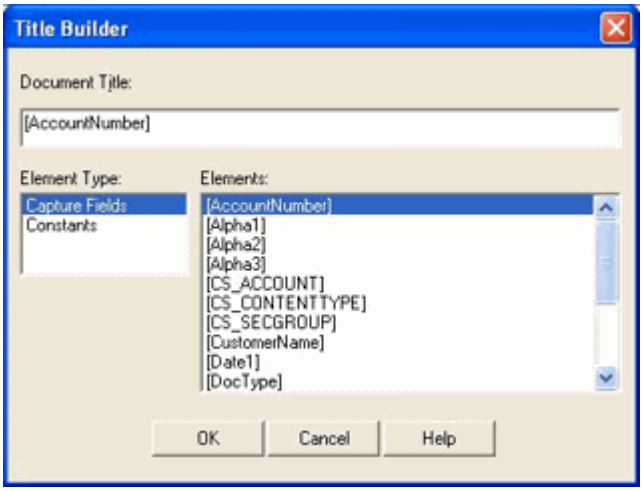


Display this screen by clicking **Add** in the Oracle UCM 11g Commit Settings Screen, Check-In Tab.

Element	Description
Field Values	Lists values in the pick-list not already mapped. Select one or more field values.
Type	Select a type for the selected field values. For example, if the document type is Invoices or Receipts, the Type might be Accounting. If you select <Default Type>, 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. The Type, Security Group, and Account fields each contain a default option (as in <Default Security Group>). If <Default Security Group> is selected, the value shown in the Default Security Group field on the Check-In tab is used.
Security Group	Choose a group for the selected field values. If you select <Default Security Group>, 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.
Account	Select an account for the selected field values. If you select <Default Account>, 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.

7.8.4.4 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: ■ Literal characters: Enter alphanumeric characters in the Document Title field. ■ Capture fields ■ Constants (spaces or dashes)
Element Type	Select the type of element you want to add to the document name. Choose **Capture Fields** to add a Capture index field from those available in the profile's file cabinet. Choose **Constants** to add a dash or space.
Elements	Double-click a Capture field or constant to add it to the document name.

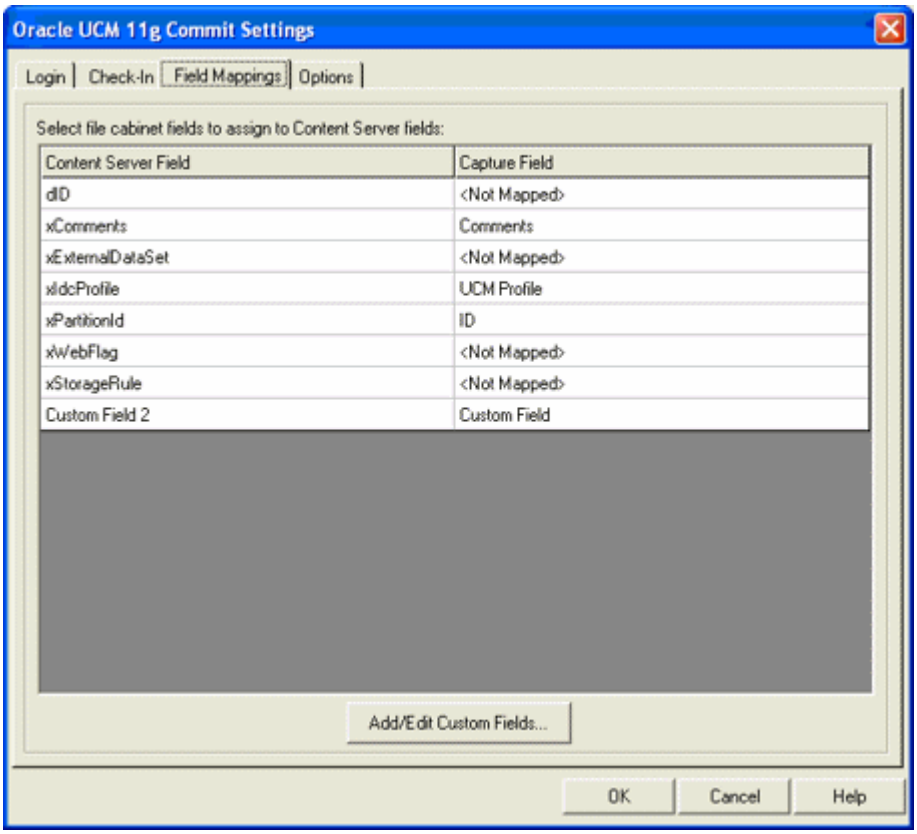
7.8.4.5 Oracle UCM 11g Commit Settings Screen, Field Mappings Tab

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.

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.

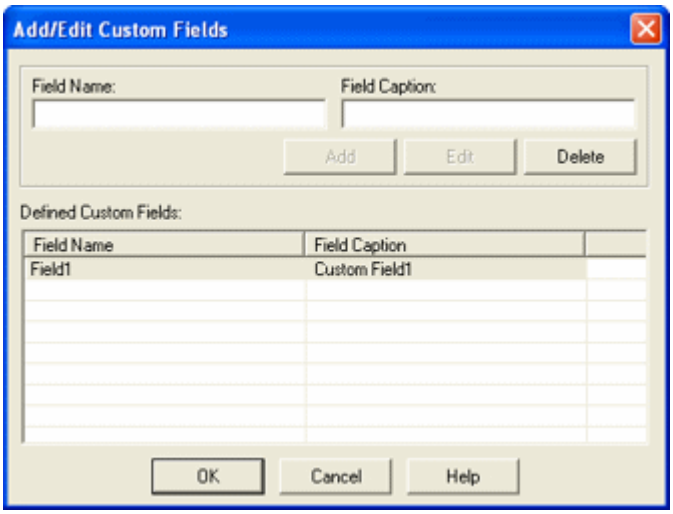


To display this screen, open a commit profile in Capture Administration, select **Oracle UCM 11g Commit Driver** in the Commit Driver field, click the adjacent Configure button, and click the Field Mappings tab.

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.

7.8.4.6 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.

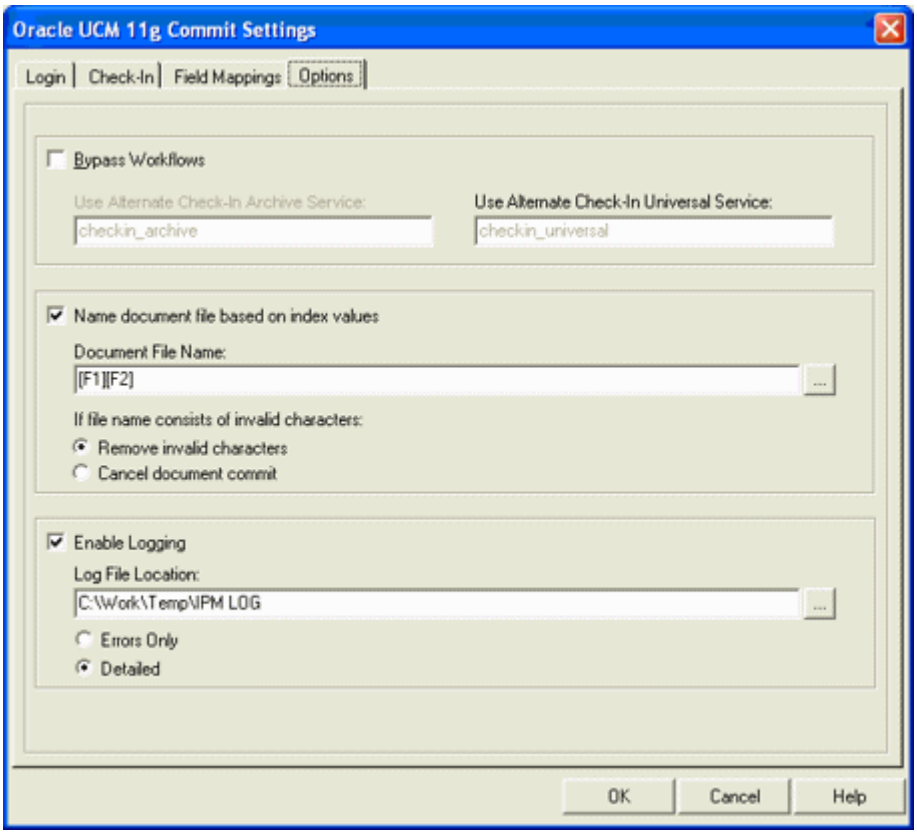


Display this screen by clicking the **Add/Edit Custom Fields** button on the Oracle UCM 11g Commit Settings Screen, Field Mappings Tab.

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.

7.8.4.7 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	Select this field to directly check in documents committed using this profile, bypassing any workflow processing. ■ When this field is *selected*, check-in is performed by the CHECKIN_ARCHIVE service, unless a custom service is specified in the **Use Alternate Check-In Archive Service** field, in which case it is used instead. ■ When this field is *not selected* (default), check-in is performed by the CHECKIN_UNIVERSAL service, unless a custom service is specified in the **Use Alternate Check-In Universal Service** field, in which case it is used instead.
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 **Bypass Workflows** 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 **Bypass Workflows** is not selected.

Element	Description
Name document file based on index values	Select this field to name document files using selected Capture index fields specified in the **Document File Name** 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.) 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. Note that this setting defines how *output files are named*; the **Document Title** field on the Oracle UCM 11g Commit Settings Screen, Check-In Tab defines how documents are *titled in Oracle UCM*. **Note:** This setting applies to Multi-page TIFF and PDF output formats only, and is grayed out if another format is selected.
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 "Oracle UCM 11g Commit Settings Screen, Title Builder" on page 7-23.
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 **Errors Only** to write to the log only if an error occurs. Select **Detailed** to log all related actions.

7.8.5 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.

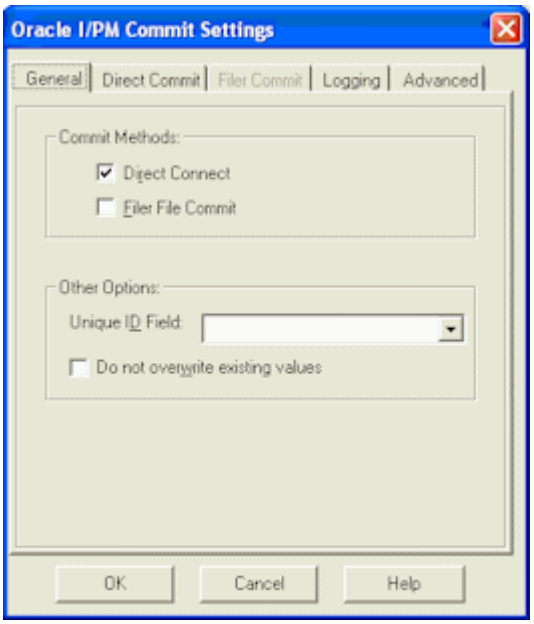
Display this screen by creating a commit profile, selecting Oracle I/PM Commit Driver in the Commit Driver field and clicking Configure to configure driver settings. Select settings on these tabs and dialog boxes:

- "Oracle I/PM Commit Settings Screen, General Tab" on page 7-29
- "Oracle I/PM Commit Settings Screen, Direct Commit Tab" on page 7-30
- "Oracle I/PM Commit Settings Screen, Direct Commit Tab, Field Mappings" on page 7-30
- "Oracle I/PM Commit Settings Screen, Process Setup" on page 7-31
- "Process Setup Screen, General Settings Tab" on page 7-32
- "Process Setup Screen, Batch Filter Properties Tab" on page 7-33
- "Process Setup Screen, Process Properties Tab" on page 7-34
- "Process Setup Screen, Field Mappings Tab" on page 7-36
- "Oracle I/PM Commit Settings Screen, Filer Commit Tab" on page 7-36

- "Oracle I/PM Commit Settings Screen, Logging Tab" on page 7-37
- "Oracle I/PM Commit Settings Screen, Advanced Tab" on page 7-38

7.8.5.1 Oracle I/PM Commit Settings Screen, General Tab

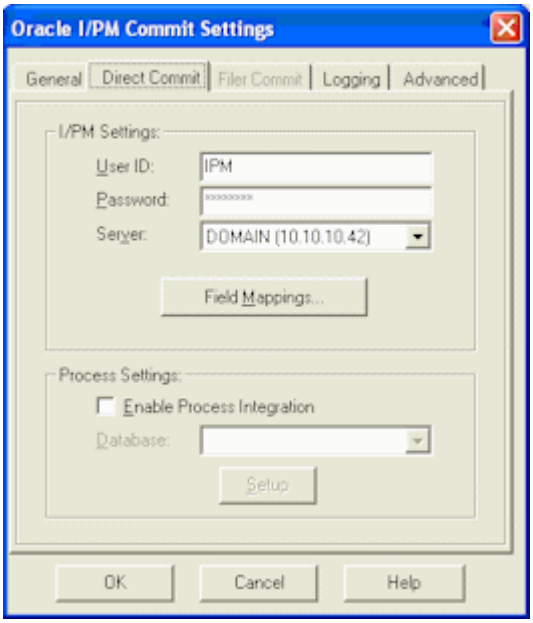
Use this tab to select general settings for the I/PM commit profile.



Element	Description
Commit Method	Specify how you want documents archived. ■ 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.) ■ Choose the Filer File Commit method to create an I/PM Filer file for each committed batch. 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.
Unique ID Field	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. **Note:** This value is unique to a Capture database. **Note:** 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.
Do not overwrite existing values	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.

7.8.5.2 Oracle I/PM Commit Settings Screen, Direct Commit Tab

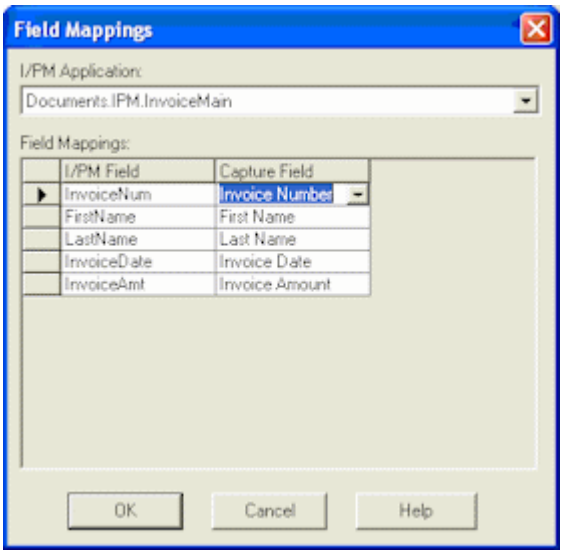
Use this tab to select direct commit options, including field mappings and process integration. Note that this tab is available when Direct Connect is selected on the General tab (see "Oracle I/PM Commit Settings Screen, General Tab" on page 7-29).



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 7-30.
Enable Process Integration	Select this field to enable the Process functionality. **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.
Database	Specify a Process database.
Setup	Click to specify detailed Process configurations.

7.8.5.3 Oracle I/PM Commit Settings Screen, Direct Commit Tab, Field Mappings

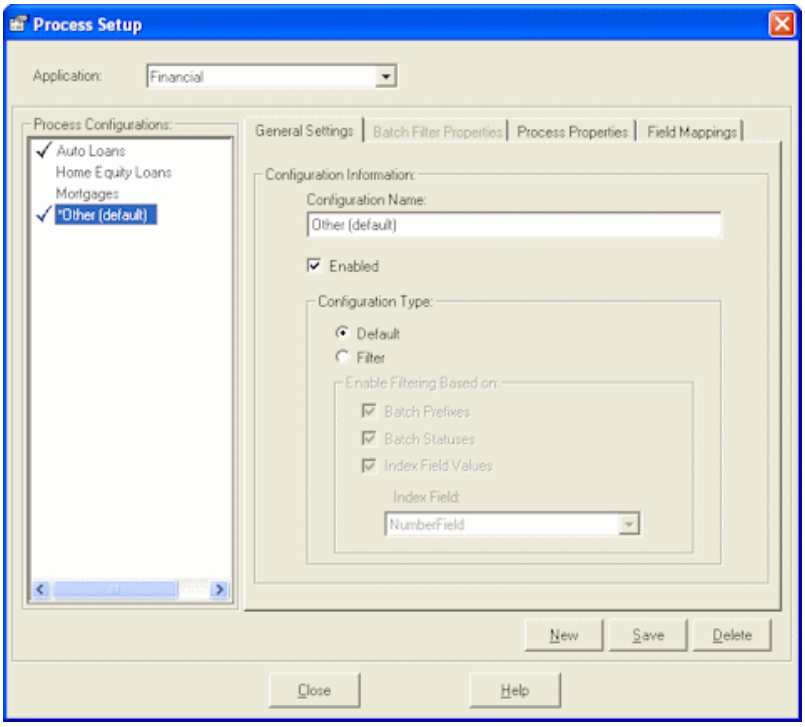
Use this dialog box to map a Capture file cabinet to an Oracle I/PM application. This dialog box is displayed when you click the Field Mappings button on the Direct Commit tab of the Oracle I/PM Commit Settings dialog box.



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.

7.8.5.4 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 7-30.

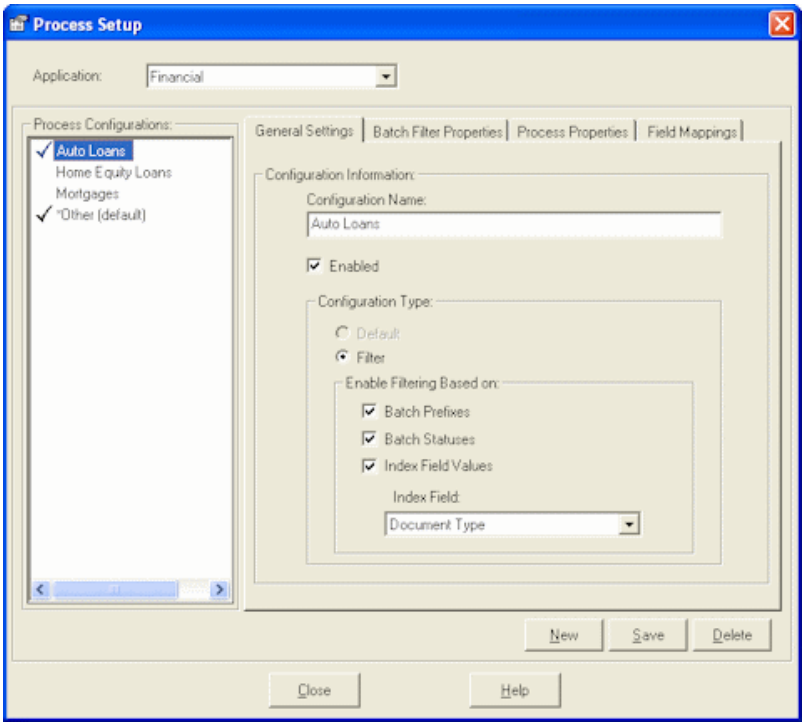
Element	Description
Application	Select another I/PM application, if needed.
Process Configurations	Lists Process configurations for the selected Oracle I/PM application. A check mark indicates that the configuration is enabled. An asterisk identifies the default configuration.
New	Click to create a configuration. 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 7-32
- "Process Setup Screen, Batch Filter Properties Tab" on page 7-33
- "Process Setup Screen, Process Properties Tab" on page 7-34
- "Process Setup Screen, Field Mappings Tab" on page 7-36

7.8.5.5 Process Setup Screen, General Settings Tab

Use this tab to enable a configuration and identify its name and type.

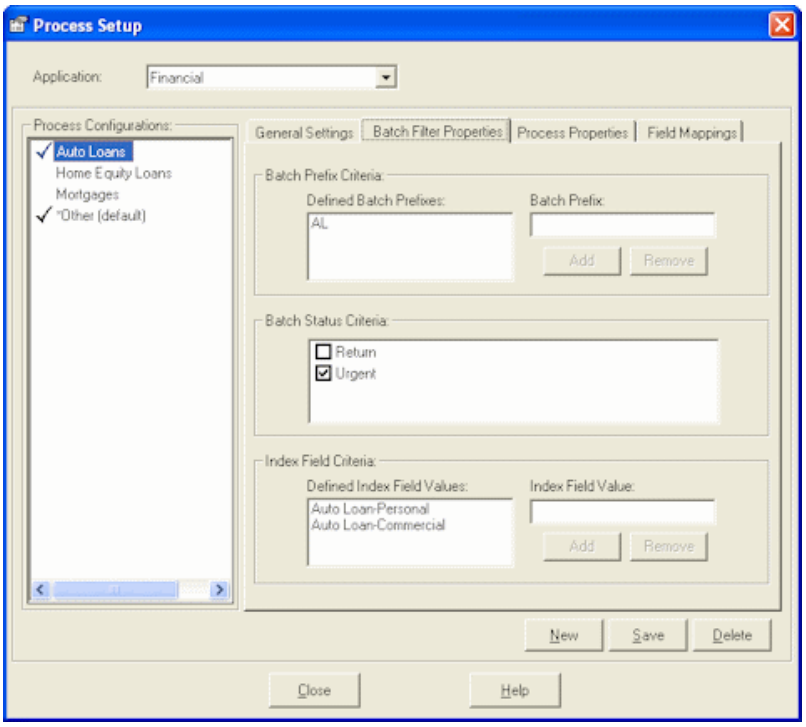


Element	Description
Configuration Name	Enter a name for the configuration. Names must be unique for the selected application.
Enabled	Select this field to activate or deactivate the configuration. A deactivated configuration is temporarily unavailable for processing.
Configuration Type	Specify the configuration 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 "Process Setup Screen, Batch Filter Properties Tab" on page 7-33. 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.

7.8.5.6 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.

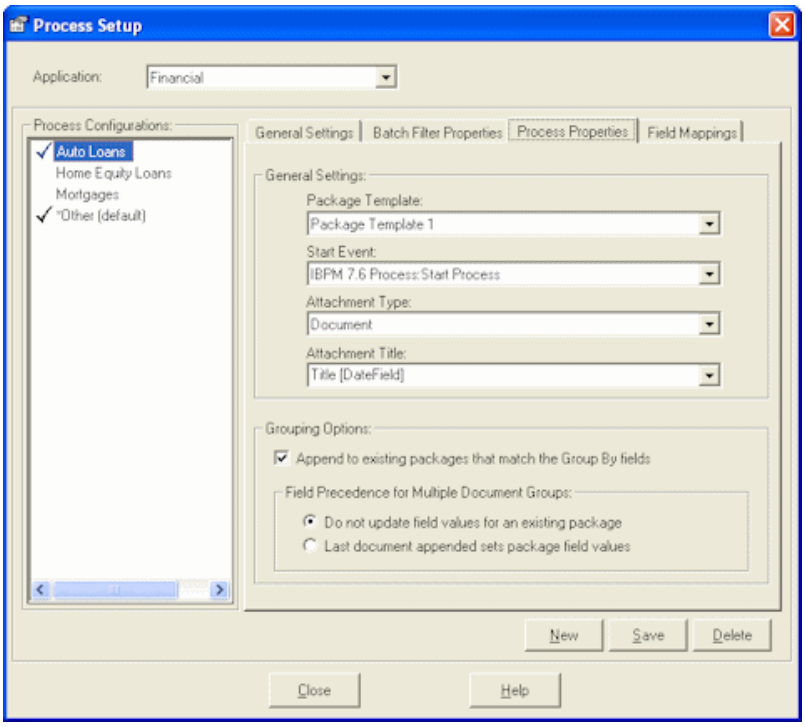
Note: In order to specify filter criteria on this tab, you must select the corresponding filter on the General Settings tab (see "Process Setup Screen, General Settings Tab" on page 7-32). For example, to filter documents by batch prefix, you must select Batch Prefixes on the General Settings tab and specify the prefixes on this tab.



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.

7.8.5.7 Process Setup Screen, Process Properties Tab

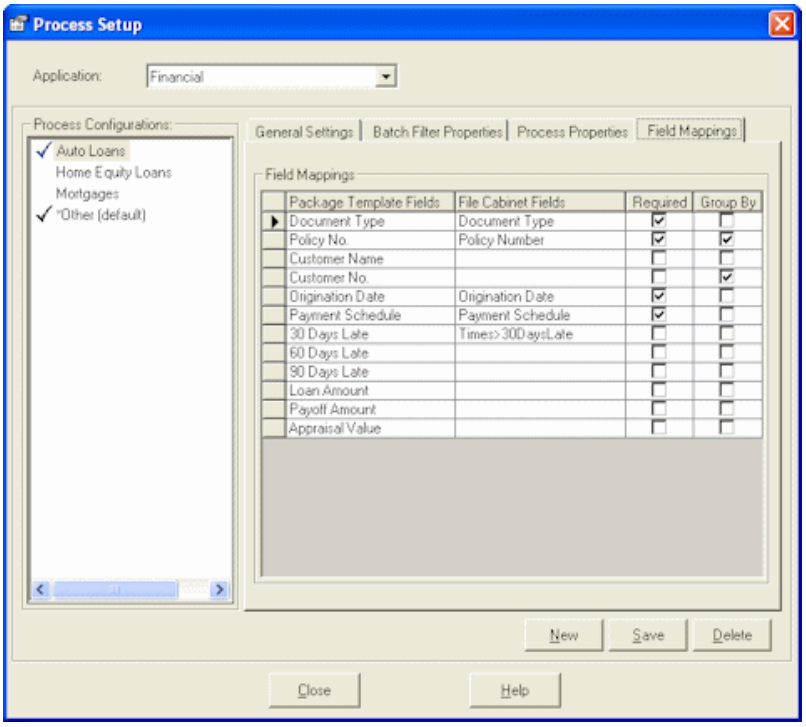
Use this tab to specify how documents are processed using the selected configuration.



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	Use these options to determine how packages are grouped together. To specify Group By fields, see "Process Setup Screen, Field Mappings Tab" on page 7-36. ■ Choose Append to existing packages that match the Group By fields 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. ■ Use the Field Precedence for Multiple Document Groups options to specify how you want index values handled when appending documents to packages. If you choose Do not update field values for an existing package, index field values are never modified when documents are appended to packages. If you choose Last document appended sets package field values, index field values are changed to those of the appended document.

7.8.5.8 Process Setup Screen, Field Mappings Tab

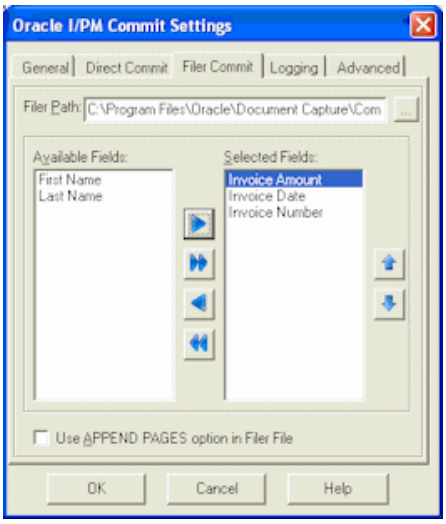
Use this tab to specify required index fields and index fields whose values are used to group packages together. (You map package fields to file cabinet index fields in the Package Template.)



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 "Process Setup Screen, Process Properties Tab" on page 7-34 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.

7.8.5.9 Oracle I/PM Commit Settings Screen, Filer Commit Tab

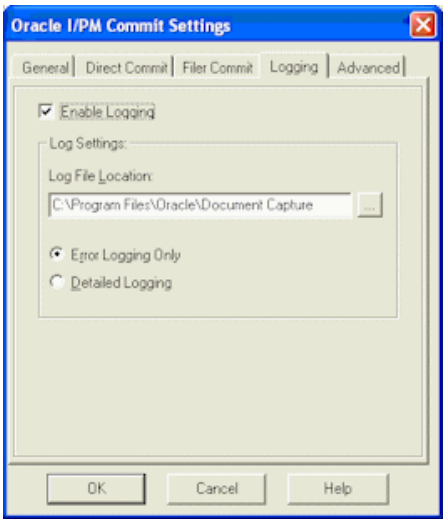
Use this tab to select settings for committing documents via Filer files. Note that this tab is available when Filer File Commit is selected on the General tab (see "Oracle I/PM Commit Settings Screen, General Tab" on page 7-29.



Element	Description
Filer Path	Enter the I/PM Filer path that Filer uses for processing Filer files. **Note:** 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.

7.8.5.10 Oracle I/PM Commit Settings Screen, Logging Tab

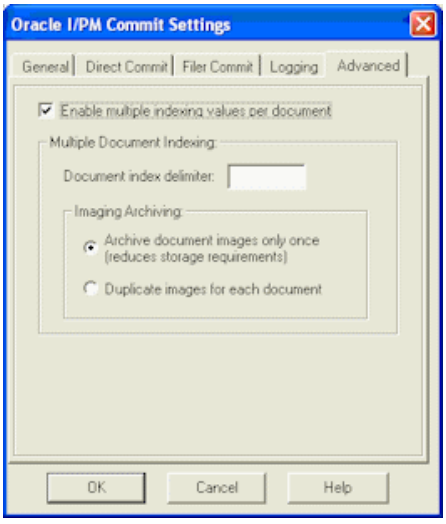
Use this tab to set logging options. When enabled, two log files are generated each day and written to the same location: a log file for the Oracle I/PM commit (whose filename uses the format EDPmmddyy.log) and a log file for Oracle process (whose filename uses the format SCPmmddyyyy.log).



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.

7.8.5.11 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. ■ 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. ■ Choose Duplicate images for each document to include the associated pages in I/PM with each document.

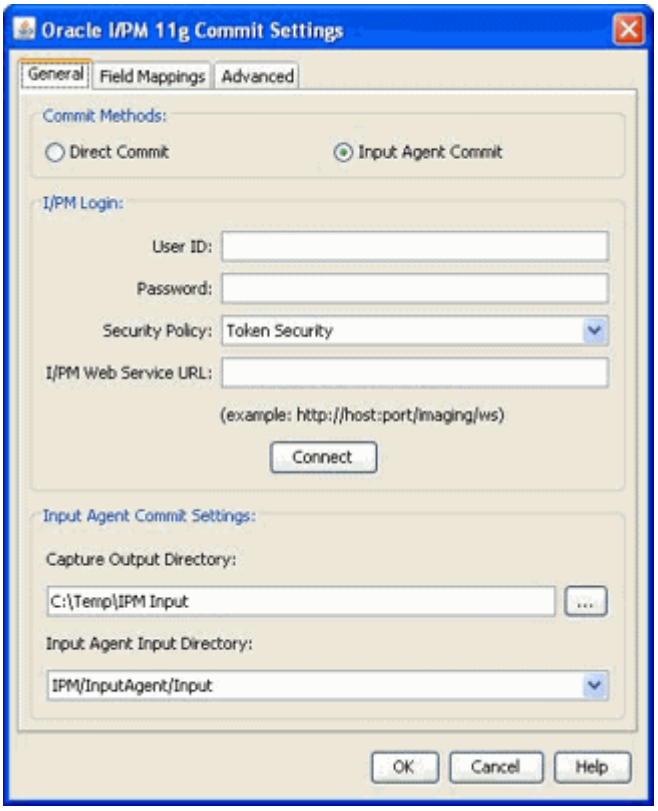
7.8.6 Oracle I/PM 11g Commit Settings Screen

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 7-39
- "Oracle I/PM 11g Commit Settings Screen, Field Mappings" on page 7-40
- "Oracle I/PM 11g Commit Settings Screen, Advanced Tab" on page 7-41

7.8.6.1 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.

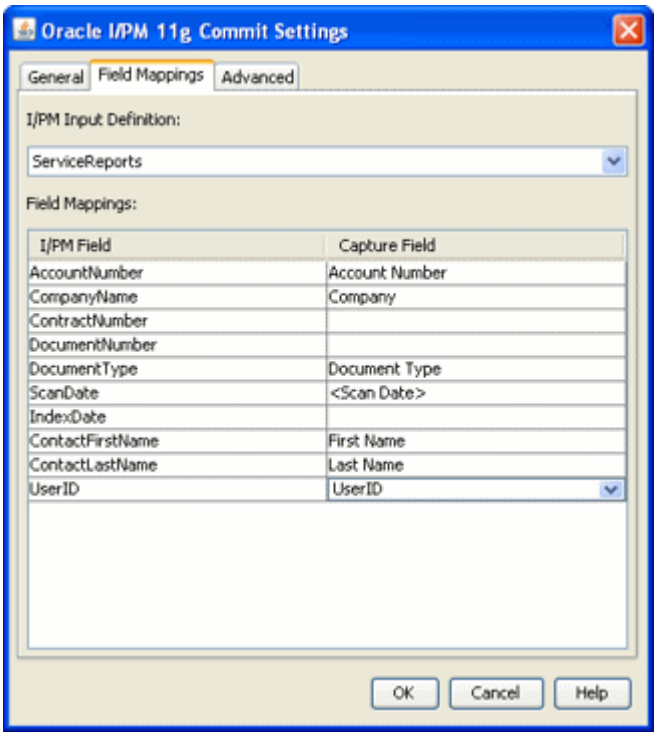


To display this screen, open a commit profile in Capture Administration, select **Oracle I/PM 11g Commit Driver** in the Commit Driver field, and click the adjacent **Configure** button.

Element	Description
Direct Connect	Choose this commit method to commit documents directly into Oracle I/PM. See "About Direct Committing" 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 "About Input Agent Committing" 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 **Token Security** if token security is configured on the server. If no policy is configured, select **Basic Security**.
I/PM Web Service URL	Specify the server to use (for example, *http://host:port/imaging/ws*). 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	If committing using an input agent, use this field and the **Input Agent Input Directory** 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: \\Server_IPM1\InputAgent\Input
Input Agent Input Directory	If committing using an input agent, use this field and the **Capture Output Directory** field to specify where input files are output and located by the input agent. (The fields identify the same directory in different ways.) 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: IPM/InputAgent/Input

7.8.6.2 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.

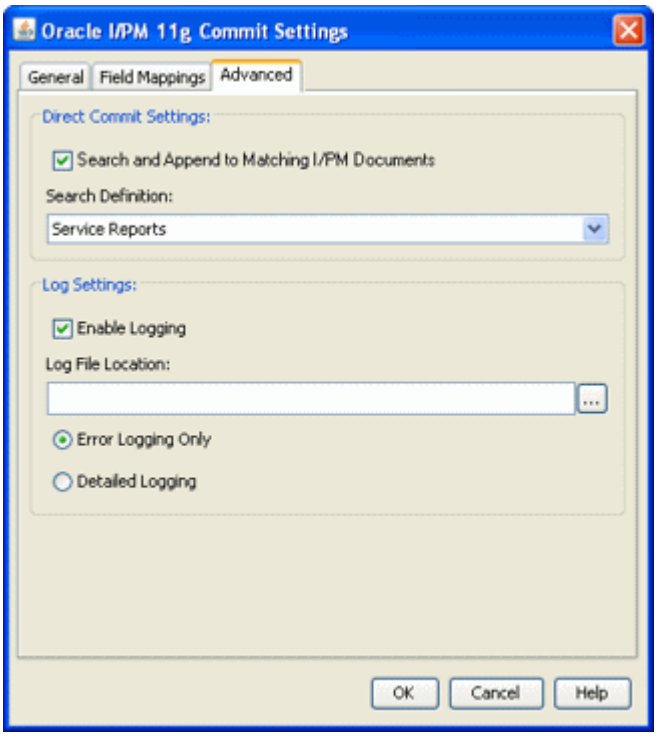


To display this screen, open a commit profile in Capture Administration, select **Oracle I/PM 11g Commit Driver** in the Commit Driver field, click the adjacent **Configure** button, and click the Field Mappings tab.

Element	Description
I/PM Application, I/PM Input Definition	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. ▪ When **Direct Commit** is selected on the General tab, this field is called *I/PM Application*, and it lists applications. ▪ When **Input Agent Commit** is selected on the General tab, this field is called *I/PM Input Definitions*, and it lists definitions, which reference an application's fields. After you make a selection, the table is automatically populated with fields from the selected or referenced Oracle I/PM application.
I/PM Field	Lists fields in the selected Oracle I/PM application or input definition.
Capture Field	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 *Doc Type* adjacent to an Oracle I/PM field called *DocumentType*. Capture fields enclosed in <> characters are system fields provided by Capture.

7.8.6.3 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 IPMMMDDYY.log.
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 commit-related actions.

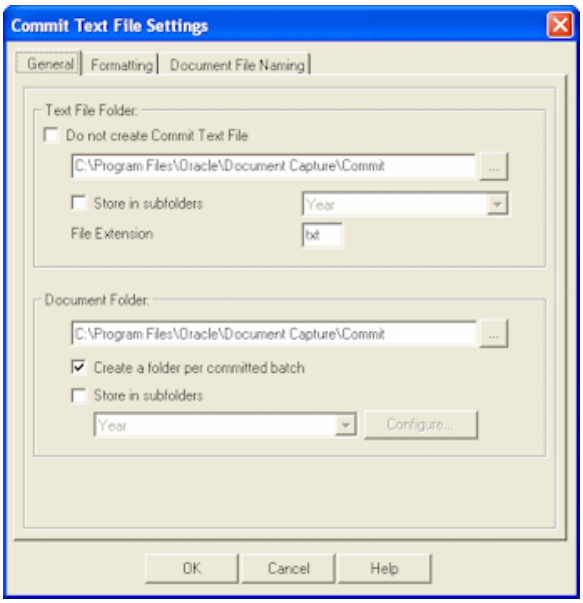
7.8.7 Commit Text File Settings Screen

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:

7.8.7.1 Commit Text File Settings Screen, General Tab

Use this tab to specify how commit text files and document files are written.



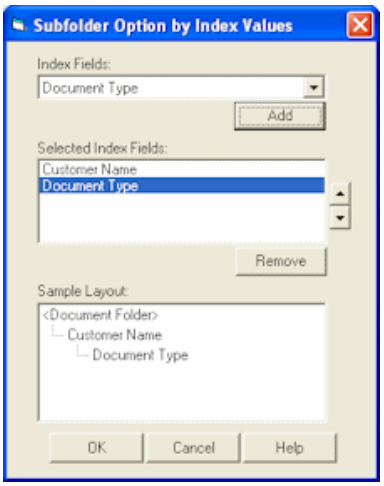
Element	Description
Do not create Commit Text File	Select this field to create document files but no commit text file. When this option is selected, it is typically combined with options on the Document File Naming tab so that document files are named using index field values.
Text File Folder	Select 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 7-3).
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 7-3).
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	Select this field to store document files in subfolders named by commit date or index value, then select a subfolder storage option. ■ 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. ■ If storing in subfolders named by index value, choose By Index Value(s) and click the adjacent Configure button.

7.8.7.2 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

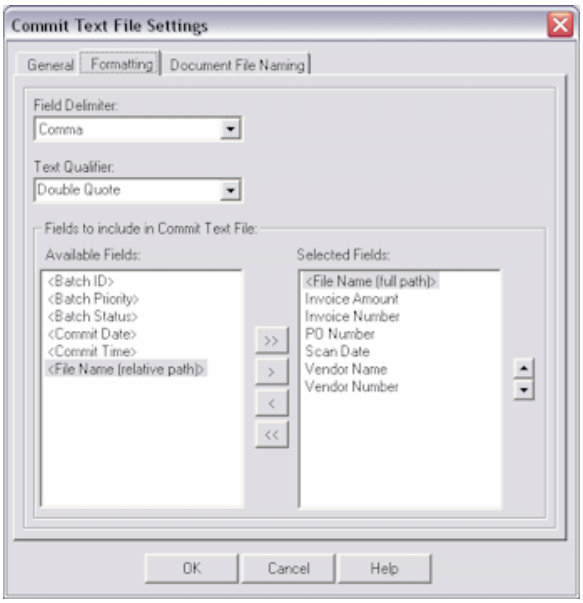


Display this dialog box by clicking Configure on the General tab of the Commit Text File Settings screen.

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.

7.8.7.3 Commit Text File Settings Screen, Formatting Tab

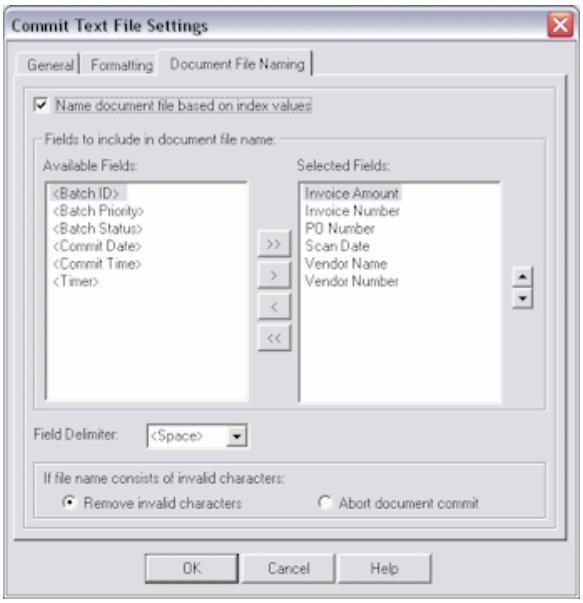
Use this tab to specify the fields and delimiters used in the commit file.



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	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: ■ Batch ID (Capture's unique Batch ID) ■ Batch Priority ■ Batch Status ■ Commit Date ■ Commit Time ■ File Name (full path): the full path to the document file (for example, c:\commit\00000001.001\00000001.TIF). ■ 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).

7.8.7.4 Commit Text File Settings Screen, Document File Naming Tab

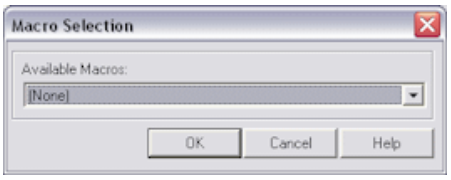
Use this tab to customize how document files are named.



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: ■ Batch ID ■ Commit Date ■ Commit Time ■ Timer (number of milliseconds after midnight) ■ Batch Priority ■ Batch Status
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.

7.8.8 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.



Element	Description
Available Macros	Select an EDP macro.

7.8.9 Database Commit Settings Screen

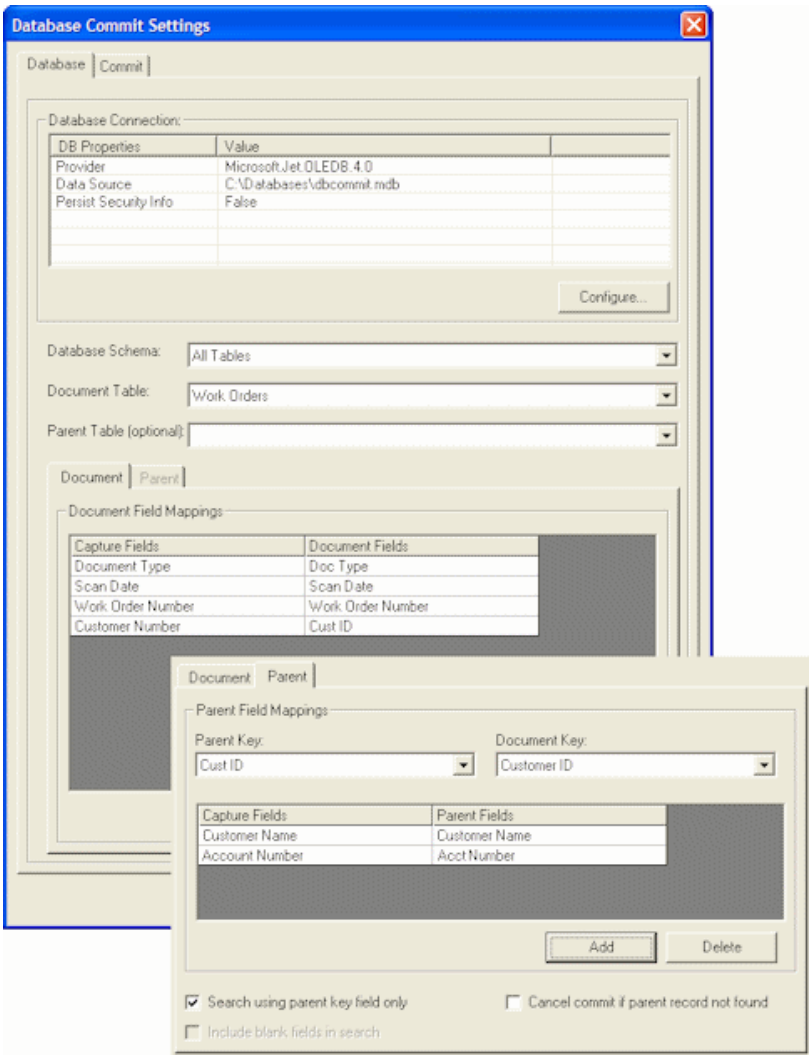
Use this screen to configure a database commit profile, which commits from Capture to a variety of databases. In the commit driver settings, specify where the document files are stored and which document index values are written to the database.

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 7-47
- "Database Commit Settings Screen, Commit Tab" on page 7-51

7.8.9.1 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 "Linked Tables Searching" on page 7-49. ■ 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. ■ When deselected, Capture searches the parent table using ALL mapped fields. This creates an AND condition, where ALL mapped fields must match.
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 "Blank Fields Searching" on page 7-50.
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 "Linked Tables Searching" on page 7-49.

7.8.9.1.1 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.

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).

7.8.9.1.2 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 7–1 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 7–1 Example: Parent Table Values when Blank Fields Included in Searches

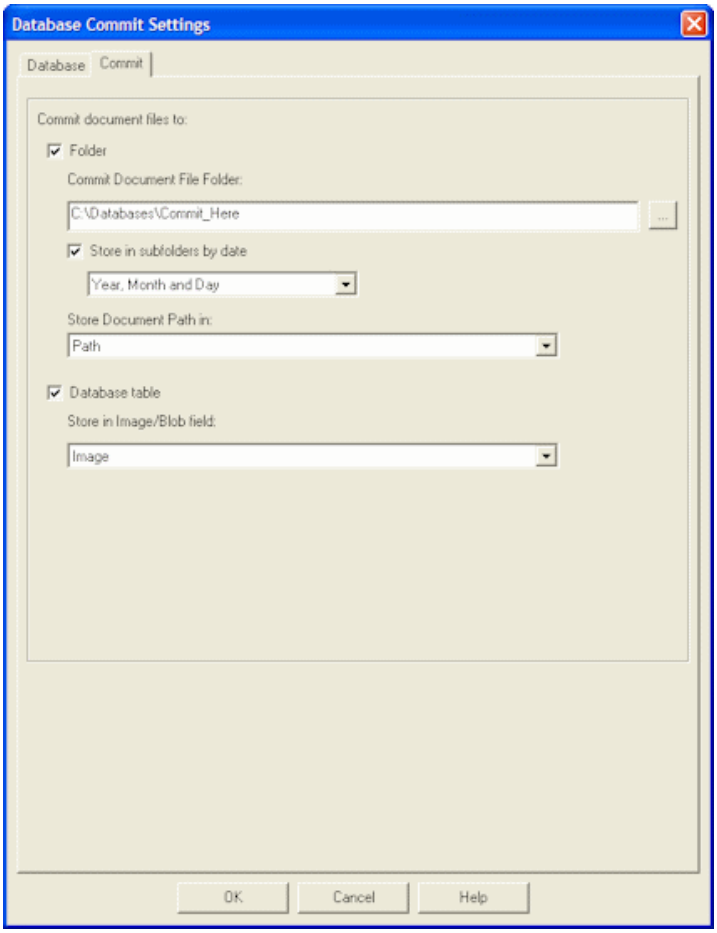
Cust ID database field value	Cust Name database field value	SSN database field value	Include blank fields in search?	Matched?
12345	John Doe	111-11-1111	No	Yes
12345	John Doe	111-11-1111	Yes	No
12345	John Doe	Null	No	Yes
12345	John Doe	Null	Yes	Yes

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.

7.8.9.2 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.

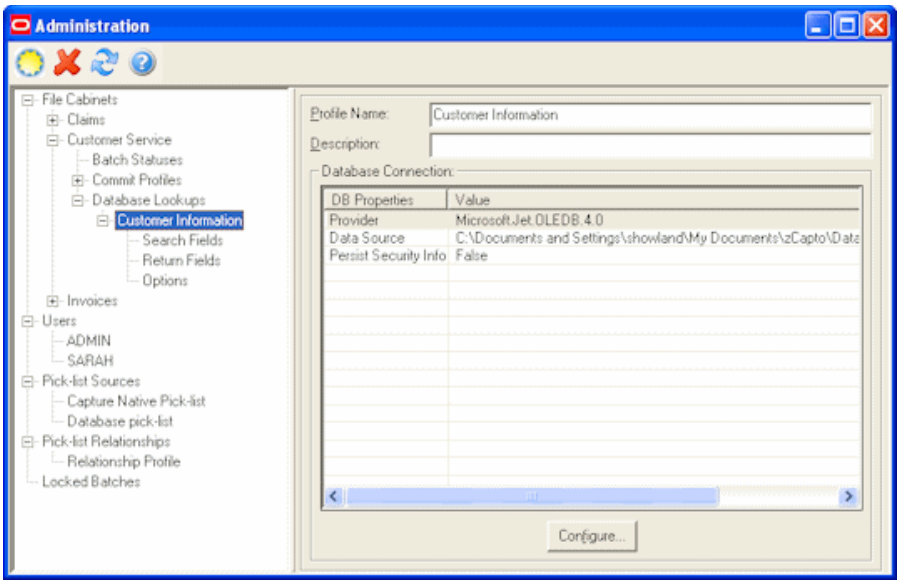
7.9 Database Lookups Screens

Database lookups include the following screens:

- "Database Lookup Settings Screen" on page 7-52
- "Return Fields Screen" on page 7-54
- "Search Options Screen" on page 7-55

7.9.1 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.

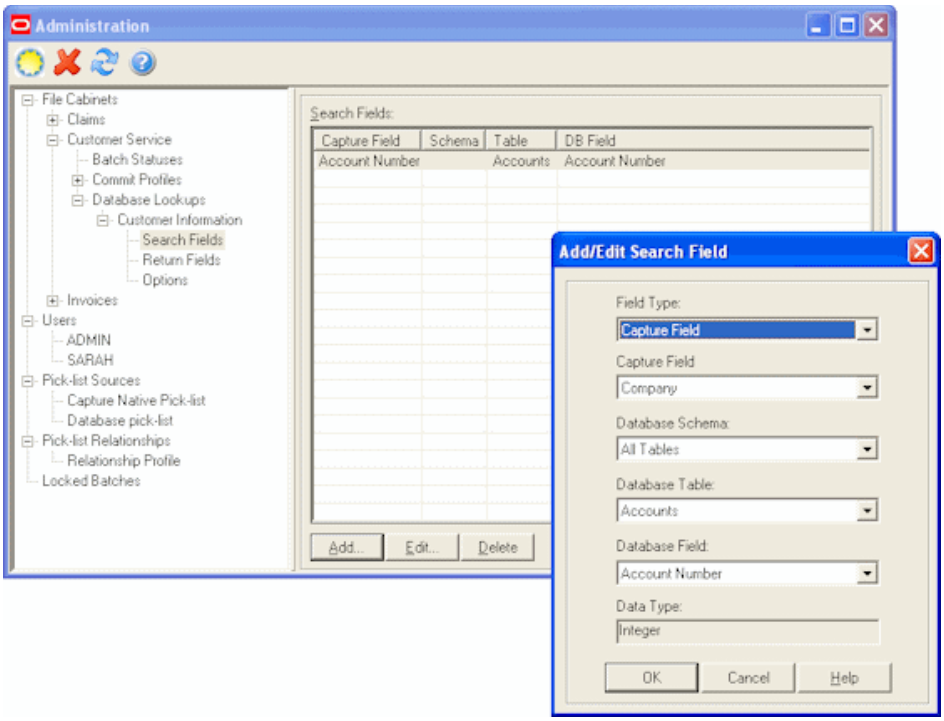


Display this screen by clicking the **Database Lookups** heading in the side pane for a selected file cabinet. Click the **New** (sun) button on the toolbar to add a database lookup.

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.

7.9.2 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 Add/Edit Search Fields Screen.
Edit	Click to edit a selected search field in the Add/Edit Search Fields Screen.
Delete	Click to delete a selected search field, then confirm the deletion.

7.9.2.1 Add/Edit Search Fields Screen

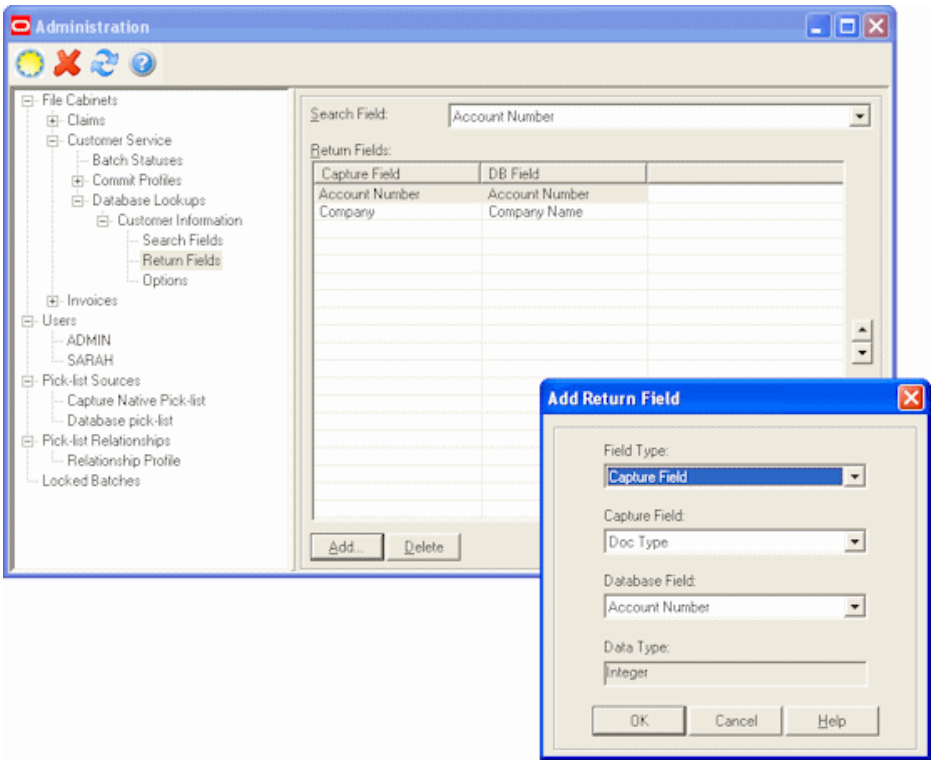
Use this screen to add or edit search fields. By specifying multiple search fields, you can provide users with more than one way to search database records and return different information. For example, you could return basic information if a user matches a customer name, but return detailed information 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. **Note:** 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.

7.9.3 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 Add Return Field Screen.
Delete	Click to delete a return field selected in the Return Fields table.

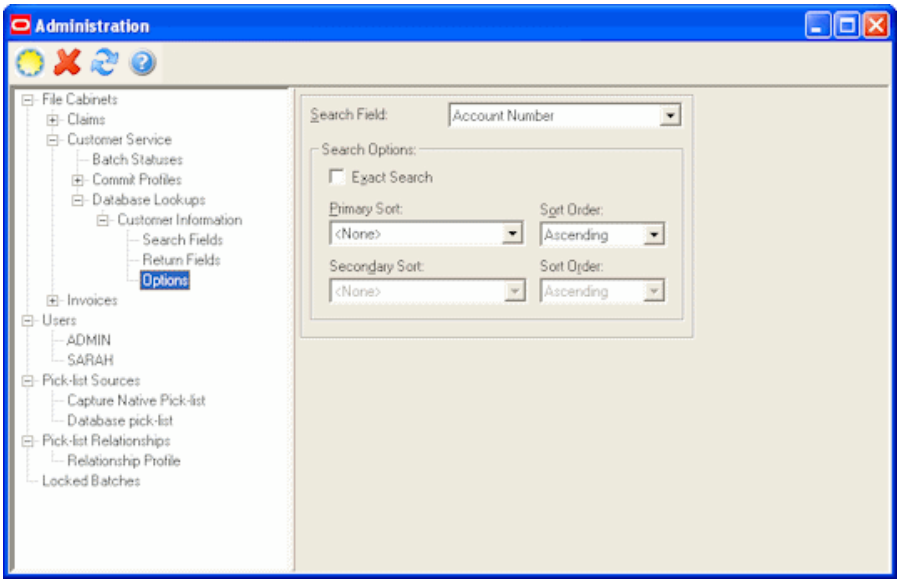
7.9.3.1 Add Return Field Screen

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 *Customer Number* 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.

7.9.4 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. **Note:** 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.

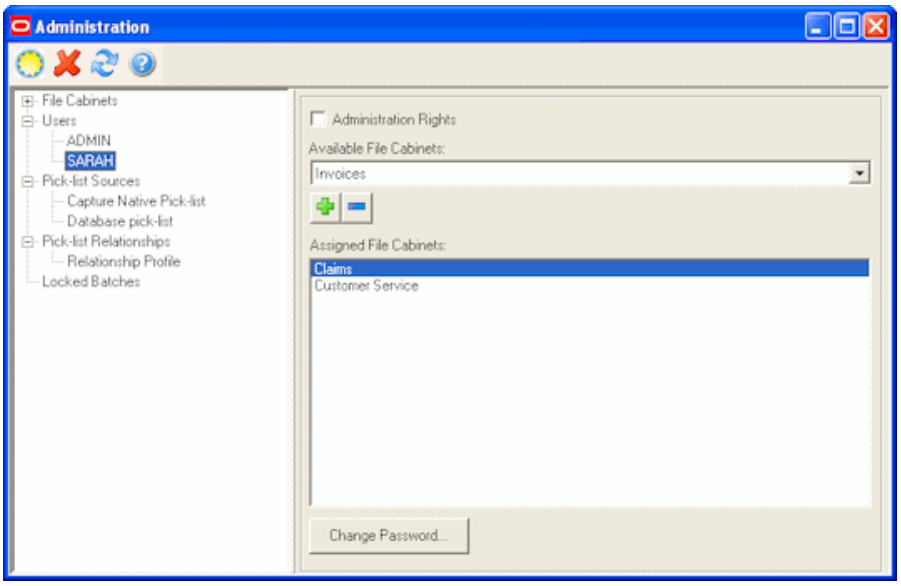
7.10 Users Screen

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 7-57 or "Add User or Group Screen (Windows Domain Security)" on page 7-57.

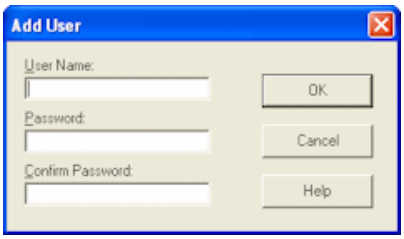


Select a user or group in the side pane, and make changes to settings in the right pane.

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.

7.10.1 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.

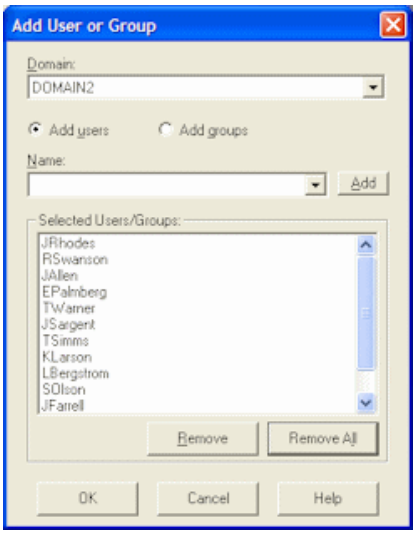


Display this screen by selecting **Users** from the Admin menu, and clicking the **New** (sun) button on the toolbar.

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.

7.10.2 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.

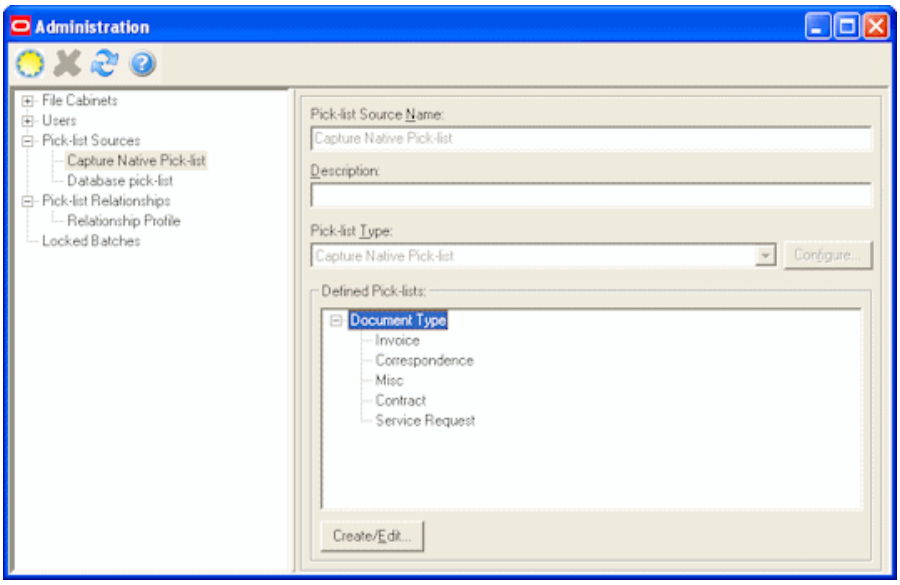
7.11 Pick-list Sources Screen

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:

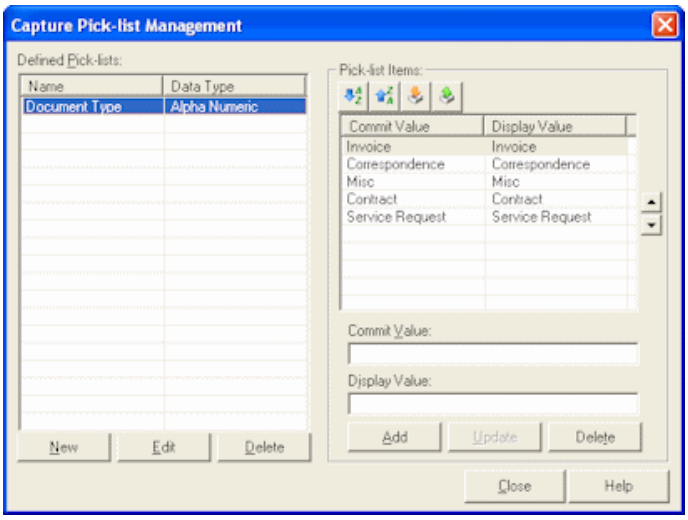
- Capture Native Pick-list, which are stored within Capture. You do not need to create a pick-list source for this type. Instead, select **Capture Native Pick-list** in the side pane and click the **Create/Edit** button to create a pick-list. See "Capture Pick-list Management Screen" on page 7-59.
- 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 7-61.



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 "Pick-list Configuration Screen" on page 7-61.
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 "Capture Pick-list Management Screen" on page 7-59. This button is not available when creating database pick-lists.

7.11.1 Capture Pick-list Management Screen

Use this screen to add, edit or delete Capture Native pick-lists.



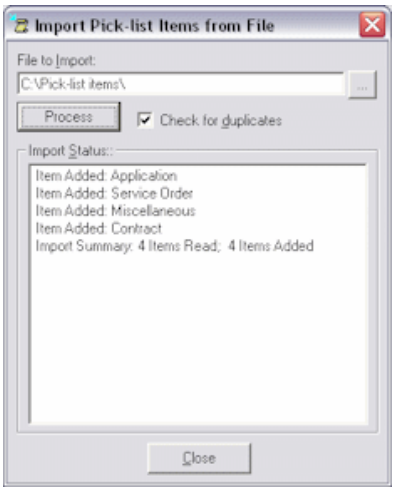
Display this screen by choosing Pick-**list Sources** from the Admin menu, selecting **Capture Native Pick-list** in the side pane, and clicking the **Create/Edit** button.

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.

7.11.2 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.

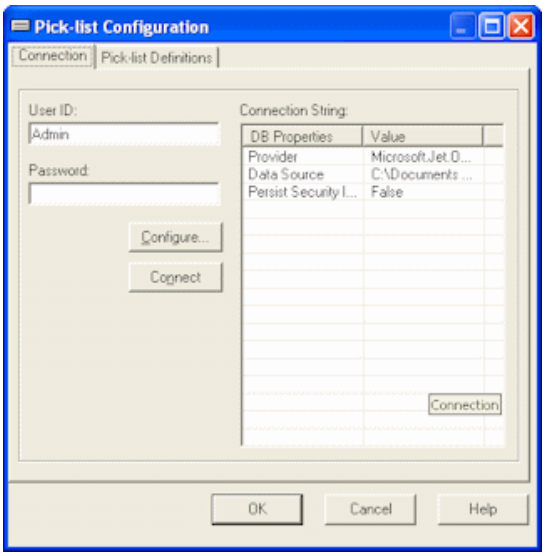
7.11.3 Pick-list Configuration Screen

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 7-62
- "Pick-list Configuration Definitions Tab" on page 7-62

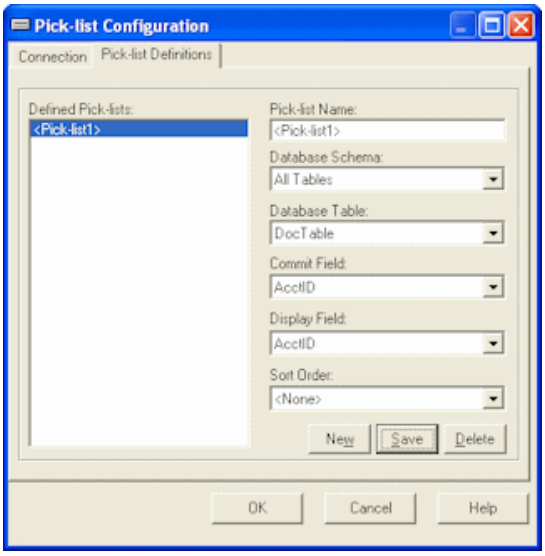
Display this screen by choosing **Pick-list Sources** from the Admin menu, selecting or creating a database pick-list, and clicking **Configure**. See "Pick-list Sources Screen" on page 7-58.

7.11.3.1 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.

7.11.3.2 Pick-list Configuration Definitions Tab

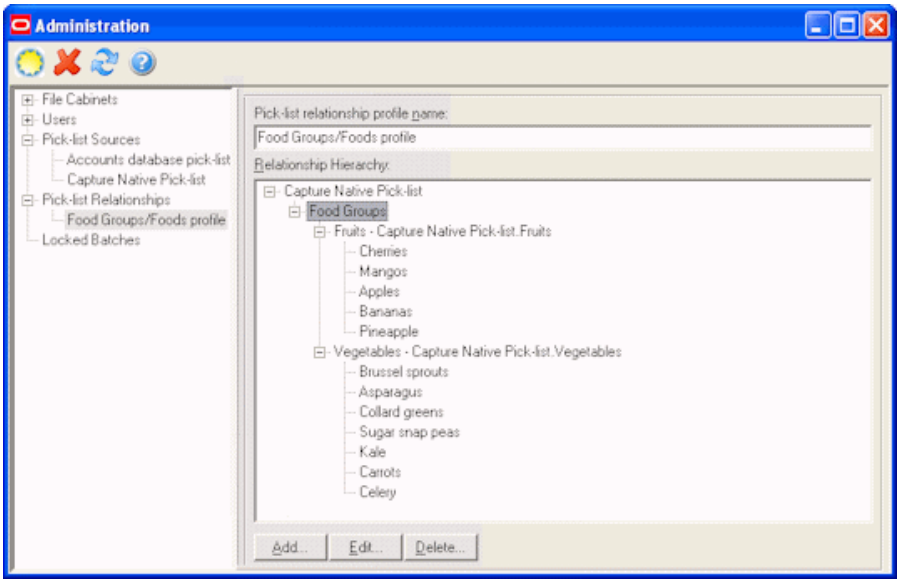


Element	Description
Pick-list Name	Enter a new name for the database pick-list.
Database Schema	If the selected database contains multiple schemas, select a schema; otherwise, choose All Tables.

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.

7.12 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.

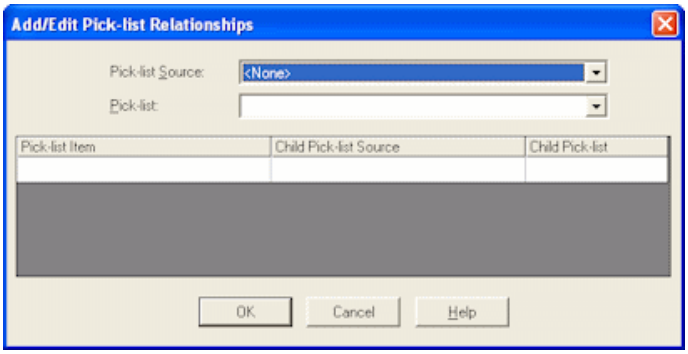


Display this screen by choosing **Pick-list Relationships** from the Admin menu and selecting or adding a pick-list relationship profile. To add a relationship profile, click the **New** (sun) button in the toolbar.

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 Add/Edit Pick-list Relationships Screen.
Edit	Click to make changes to a selected pick-list hierarchy in the Add/Edit Pick-list Relationships Screen.
Delete	Click to delete the selected hierarchy from the profile.

7.12.1 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.



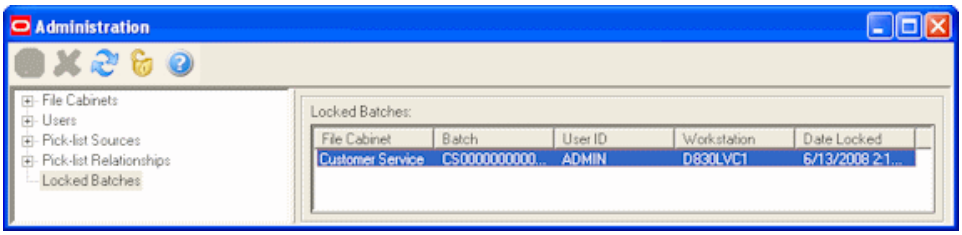
Display this screen by choosing **Pick-list Relationships** from the Admin menu, selecting a pick-list relationship profile and clicking **Add** or **Edit**.

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.

7.13 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.

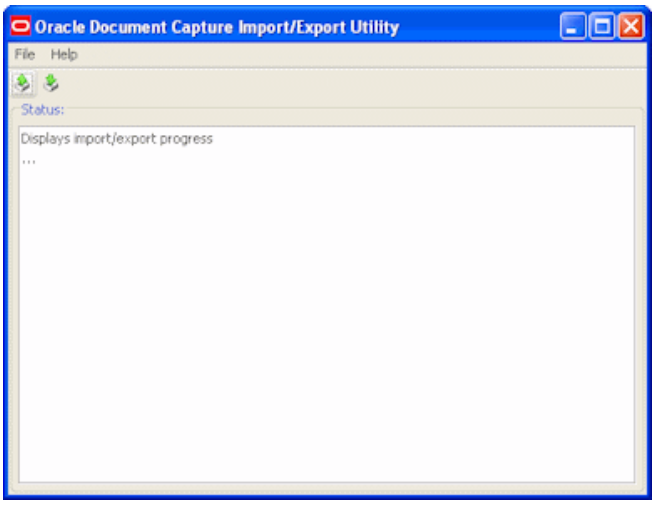
Element	Description
Unlock Batch	Unlocks the selected batch.
Refresh	Loads the list of batches in use again.

7.14 Import/Export Utility Screen

The Import/Export Utility includes the following screens:

- Main screen (shown below)
- "Specify Export Settings Screen" on page 7-66
- "Elements To Be Imported Screen" on page 7-66

Use this screen to import or export Capture elements. For more information, see "About the Import/Export Utility" on page 2-15.

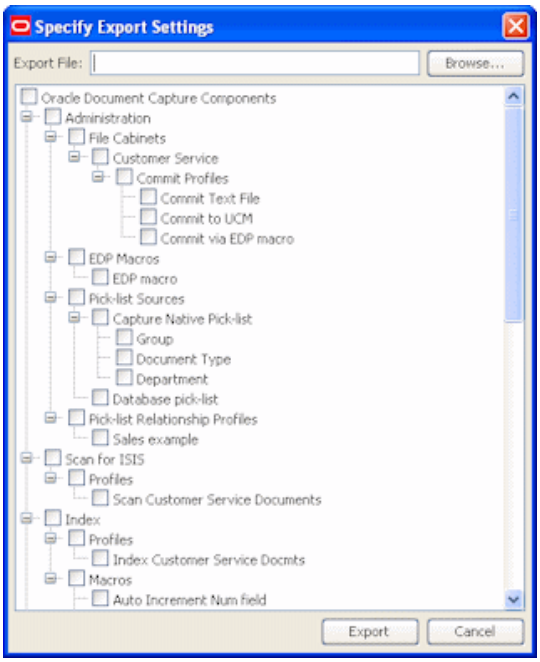


To display this screen, choose **Oracle Document Capture** from the Start menu, then choose **Import-Export Utility**.

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.

7.14.1 Specify Export Settings Screen

Use this screen to select the elements for each component to export.

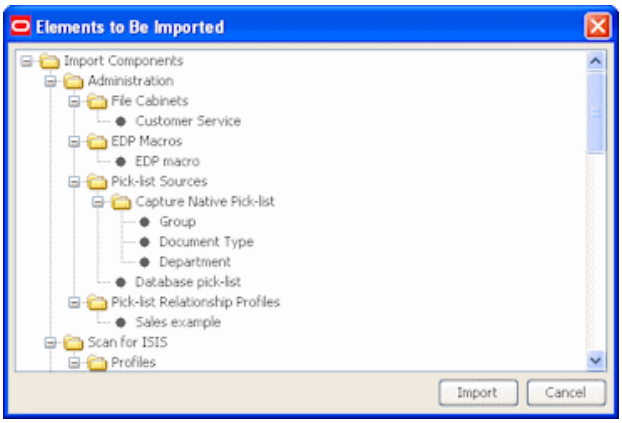


To display this screen, click the **Export** button (Ctrl+E) in the Import/Export Utility Screen.

Element	Description
Export File/Browse	Click **Browse** 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.

7.14.2 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.

> **Caution:** Before importing, it is recommended that you back up the corresponding Capture elements in the target system.

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.

8

Auditing in Oracle Distributed Document Capture

The Oracle Distributed Document Capture Server 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 sent per day by all users, by file cabinet. This would allow you to compare the output of client users.

This section covers the following topics:

8.1 ecAudit Table

Table 8–1 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.
ecProcessID	Text	20	Process name or tool that is logging the activity. Applicable IDs include: ■ Web Capture Service ■ Batch Manager
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.

Table 8–1 (Cont.) ecAudit Table

Column Name	Data Type	Field Length	Description
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.

8.2 Activity IDs

All scanning and indexing audit information is tracked in the same table. This section describes which activities Oracle Distributed Document Capture audits and reports in the ecAudit table fields.

The following tables describe the data elements for Oracle Distributed Document Capture audit activity:

Table 8–2 Create Batch

Element	Description
Activity ID	1
Description	Create Batch
ecFile Cabinet	File cabinet in which the batch was created
ecBatch	Capture batch name
ecActionDataText1	Number of pages in the batch
ecActionDataText2	Capture Batch ID

Table 8–3 Commit Batch (both deferred and immediate)

Element	Description
Activity ID	10
Description	Commit Batch
ecFile Cabinet	File cabinet of the batch
ecBatch	Capture batch name
ecBatchID	Capture batch ID
ecActionDataInt	Committed page count
ecActionDataFloat	Number of documents in the batch
ecActionDataText2	Number of pages in the batch

Table 8–4 Receive Batch

Element	Description
Activity ID	400
Description	Receive Batch
ecFile Cabinet	File cabinet referenced in the batch
ecBatch	Capture batch name
ecActionDataText1	Name of the user who created the batch on the client
ecActionDataText2	Name of the user who last modified the batch
ecActionDataText3	Name of the computer that created the batch
ecActionDataText4	Date on which the batch was created on client
ecActionDataText5	Date on which the batch was last modified on client

Table 8–5 Receive Batch More Information

Element	Description
Activity ID	401
Description	Receive Batch More Information
ecFile Cabinet	File cabinet referenced in the batch
ecBatch	Capture batch name
ecActionDataText1	Version number of the client used to create this batch

Table 8–6 Post Batch Received

Element	Description
Activity ID	402
Description	Post Batch Received
ecFile Cabinet	File cabinet referenced in the batch
ecBatch	Capture batch name
ecBatchID	Capture batch unique ID. This audit entry contains the same values as the Receive Batch entry (Activity ID 400). However, it is written to the database table after the batch has been created, so its ecBatchID contains a value other than 0. You can use this ecBatchID value to link a Capture batch received by the server to the original batch sent by the client.
ecActionDataText1	Name of the user who created the batch on the client
ecActionDataText2	Name of the user who last modified the batch
ecActionDataText3	Name of the computer that created the batch
ecActionDataText4	Date on which the batch was created on client
ecActionDataText5	Date on which the batch was last modified on client

A

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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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