

# Oracle® Cloud

## Capturing Content with Oracle Content Management



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# Preface

This publication is intended for administrators and users. It describes how you can manage, administer, and use Content Capture.

## Audience

This document is intended for administrators and users. Administrators will find information about managing and administering Content Capture. And, the end users will find information about using the Content Capture Client to scan, import, and automatically process documents to meet their business requirements.

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## Related Resources

For more information, see these Oracle resources:

- Oracle Public Cloud:  
<http://cloud.oracle.com>
- *[What's New in Oracle Content Management](#)*
- *[Administering Oracle Content Management](#)*

- *Getting Started with Oracle Cloud*

## Conventions

The following text conventions are used in this document.

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

# Part I

## Getting Started

Content Capture is an Oracle Content Management feature that enables you to scan physical documents and import electronic documents in large batches, process and index them, and upload them to Oracle Content Management for storage and/or further processing.

Here's some information that will help you get started:

- [Learn About Content Capture](#)
- [Understand the Content Capture Process](#)
- [Learn About the Main Content Capture Components](#)
- [Learn About Roles and Security](#)

# 1

## Learn About Content Capture

The content capture features of Oracle Content Management provide you with one system to capture, index, store, and manage your mission-critical business content. You can [scan and import](#) documents in bulk, and process them automatically before they're uploaded to Oracle Content Management. Documents consist of one or more images obtained from a scanner or imported from a file, or they can be non-image, electronic files such as Microsoft Word or PDF files. When you import non-image files, the defined capture flow determines whether they are retained in their original format, converted to an image format, or prevented from being imported.

The batches of documents that you create are scalable, allowing you to reorganize documents, automate their grouping to suit your business needs, read barcodes for billing or filing purposes, index documents to make them easily searchable, and convert them to standard formats for your organization. You create content capture workflows, or [procedures](#), which automate the processing and routing of physical and electronic documents in bulk.

The primary drivers for capturing content are batches and documents. Documents are [scanned](#) or [imported](#) and maintained in [batches](#). A batch consists of scanned images or electronic document files (such as PDF or Microsoft Office files) which are organized into documents and assigned metadata values ([indexed](#)). Each document shares a set of metadata values. Oracle Content Management provides a variety of content capture [processors](#) which import documents, convert them to PDF and/or TIFF, auto-recognize bar codes, automatically separate documents, populate metadata values, and deliver the final output to Oracle Content Management.

The content capture process involves the following main components:

- [Capture](#)
- [Conversion](#)
- [Classification](#)
- [Release](#)
- [Commit](#)

## Capture

Scanning or importing documents into batches within a content capture procedure can be done in a variety of ways:

- High volume scanning using a production document imaging scanner
- Ad hoc remote scanning or import, such as from a business application
- Automated import, such as from an email account or monitored folder

End-users can manually [scan](#) hardcopy documents or [import](#) electronic documents into batches using the Content Capture Client software (based on [client profiles](#) created by [procedure](#) managers). Alternatively, using settings stored in an import job, the import processor can also automatically import images and other electronic documents directly from email, network folders, or list files.

## Conversion

Depending on your business needs, you may need to convert non-image input documents and attachments to a different format. For example, PDF expense reports attached to imported email messages may need to be converted to an image format to allow their bar codes to be read. In this case, the TIFF conversion processor converts PDF files to TIFF images. The TIFF conversion processor automatically converts documents or attachments and merges them within a batch using settings stored in a conversion job. The PDF conversion processor converts documents to PDFs of the same content type as of the source documents.

## Classification

**Classification** is the process of separating batches into their logical documents and assigning document profiles. The client profile specifies a set of possible [metadata fields](#) and [attachment types](#) available to each document. Classification also involves assigning a [status](#) to a batch.

Classification can occur manually or automatically in a variety of ways:

- [Document Separation](#)
- [Metadata Assignment](#)
- [Attachment Type](#)
- [Batch Status](#)

## Document Separation

- Manually by Content Capture Client users. For example, users can select a client profile configured for a specific number of pages per document. They can also insert separator sheets between documents prior to scanning to identify a new document. While visually inspecting a batch, Content Capture Client users can create new documents by splitting larger documents into multiple, smaller documents.
- Manually by users during file import in the Content Capture Client.
- Automatically, when the import processor imports documents based on job settings.
- Automatically, during bar code recognition by the recognition processor. If a batch is sent to the recognition processor, the processor automatically performs bar code recognition and document classification.

## Metadata Assignment

Documents are assigned a set of metadata values based on a document profile, which is called [indexing](#). This profile identifies the metadata fields available for indexing a particular type of document. Metadata values can be assigned in various ways:

- Manually, by users in the metadata pane of the Content Capture Client.
- Automatically, when the import processor processes documents based on job settings.

- Automatically, during processing by the recognition processor, based on job settings.
- Automatically, during processing by the asset lookup processor, based on job settings.

Metadata fields can be configured in a variety of ways. You can configure an input mask and a display format or provide a regular expression for validation. Metadata values can be auto populated, selected from choice lists (or derived from bar codes) and dependent choice lists. Procedure managers configure these metadata field definitions in the procedure and then use them in client profiles or processor jobs.

## Attachment Type

An attachment is an image or non-image file associated with a primary document. Procedure managers define [attachment types](#), which can be assigned to document profiles. These attachment types may be used to classify attachments with documents that have been assigned to a document profile. Content Capture Client users can view attachments, change an attachment type, create attachments, and modify image attachments.

## Batch Status

Procedure managers define [batch statuses](#) to suit their business needs. The user assigns them to a batch manually at any time during the content capture process, or automatically by one of the processors.

## Release

Oracle Content Management uses a lock-and-release method to ensure that only one user or processor has access to any content capture batch at any given time. A batch automatically becomes locked to you when you create or open (expand) the batch. You need to [release](#) or unlock the batch to make it available to others. When you're done working with a batch, you release or unlock it. Releasing a batch automatically synchronizes its documents and metadata with Oracle Content Management and routes the batch for further processing (commit, recognition, or conversion), if this is configured in its client profile.

## Commit

When a batch is committed, all of its documents and their metadata are uploaded to Oracle Content Management and then removed from the batch. This allows the documents to be located and accessed in Oracle Content Management via their metadata or contents. Some of the documents may not be committed. For example, documents without their required fields populated are skipped. If all documents in a batch are committed, the batch is also deleted from the procedure.

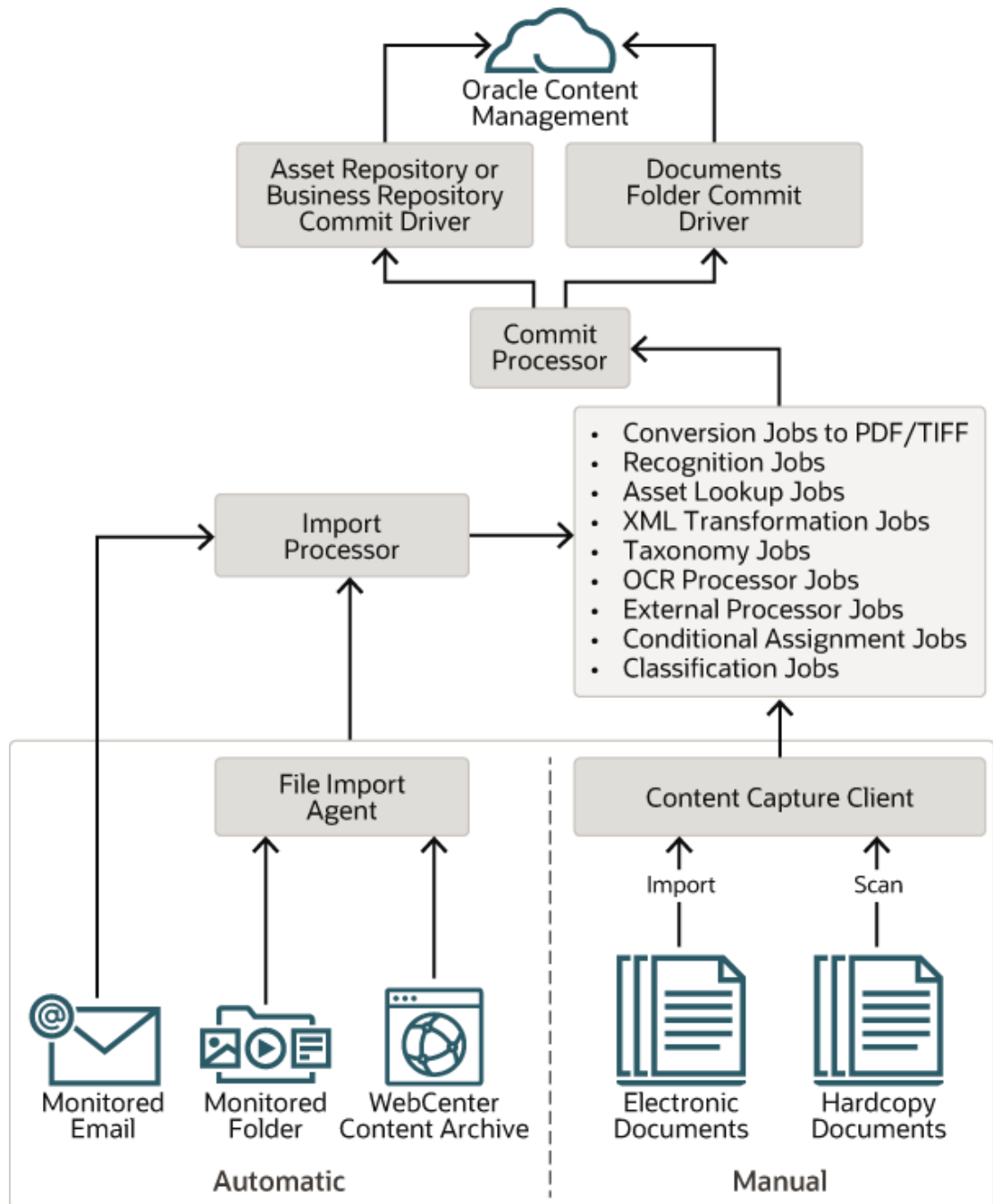
During the commit process, non-image files that weren't converted to an image format remain in their original format.



# 2

## Understand the Content Capture Process

Let's have a look at the basic process of capturing content and uploading it to Oracle Content Management.



## Sources

Content can be captured from various sources:

- manually, by [scanning](#) hardcopy (printed) documents using the Content Capture Client,
- manually, by [importing](#) electronic documents using the Content Capture Client,
- automatically, from a [monitored file folder](#) (through the file import agent),
- automatically, from an inbox or folder of a [monitored email server account](#).
- from an [archive of the on-premise Webcenter Content files](#).

## Processors

Regardless of the source, each captured document is routed through a number of processors before it's uploaded to Oracle Content Management for storage and/or further processing:

- The **import processor** provides automated bulk importing from sources such as a file system folder, a delimited list text file, or the inbox/folder of an email server account. The import job monitors the source and imports content at a specified frequency (for example, once a minute, hour, or day).
- The **TIFF conversion processor** automatically converts non-image documents and attachments to TIFF or JPEG format. You can choose to merge documents and attachments in various ways during conversion. For example, the conversion processor can convert document files such as PDFs or Microsoft Office documents to TIFF images for bar code processing.
- The **PDF conversion processor** converts documents, images, and attachments to PDFs.
- The **recognition processor** automatically recognizes bar codes, organizes documents, and indexes them.
- The **commit processor** executes commit profiles to automatically output and upload documents in a batch to Oracle Content Management, and then removes the batches from the procedure.

A commit profile specifies how to output the documents and their metadata, and it includes metadata field mappings, output format, error handling instructions, and commit driver settings.

- The **asset lookup processor** enables client users to search for supported assets in the Oracle Content Management repository.
- The **XML transformation processor** enables client users to transform XML documents into a desired style based on an XSLT file.
- The **taxonomy lookup processor** enables users to select taxonomy categories or automate taxonomy searches using a Content Capture field value.
- The **external processor** enables you to integrate existing, or new, capabilities with Content Capture. These capabilities can include types of document conversions, perhaps to Microsoft PowerPoint or other image formats. Or, the external processor could assign metadata values based on document content or

sender's email address. In general, it's a means to extend the functionality of Content Capture as a document flows through a procedure.

- The **conditional assignment processor** provides a basic conditional logic that gives you the flexibility to manipulate metadata field values and change document profiles.
- The **optical character recognition (OCR)** enables you to convert image documents into PDF or text.
- The **Classification Jobs** processor enables you to automate detection of languages and classification of documents when the documents are received. After classification jobs are committed, asset languages are set in Oracle Content Management.

Each processor, if you've configured to use them all, works in coordination with the others. Many tasks in a batch flow begin with the import processor, and then pass on to the PDF or TIFF conversion processor for converting documents to the configured formats. The recognition processor subsequently takes over for recognizing bar codes, organizing documents in specified ways, and indexing them. And finally, the commit processor delivers (uploads) the output to Oracle Content Management.

All captured documents are uploaded and stored in Oracle Content Management as separate content items with the metadata assigned during the content capture process. You can access and manage these items just as any other items in Oracle Content Management.

## Procedures

**Procedures** are defined content capture workflows, from the initial sourcing all the way to final upload to Oracle Content Management. Each procedure represents a complete content capture system, providing a centralized location to configure metadata, processing rules, configuration profiles, and batch data for a particular environment. Content Capture Client users create and access batches within a procedure to which they've been granted access.

You can create multiple procedures for your organization, so you can efficiently manage all your content capture and processing needs, for example by department or location. You can also share common configuration elements between procedures for optimal reuse. And you can also copy a procedure for easy adaptation for other environments.

## Batches

A **batch** contains one or more documents, which may be related (for example, multiple documents for a customer) or unrelated (for example, documents divided by separator sheets).

- A document may consist of scanned images or an electronic file such as a Microsoft Word or a PDF file.
- A document may or may not contain attachments such as images or an electronic file.

When you work with a batch, you can lock it. You will see a lock icon if a batch is locked by you or another user. Releasing a batch removes the lock icon and, depending on the client profile settings, frees the batch for another user or a system processor to work on.

## Client Profiles

You **scan** or **import** groups of pages in batches using a client profile that the procedure manager has defined for you. A **client profile** is a group of settings that determine how to scan, import, or index the documents in a batch. A client profile does the following:

- It controls such things as scanner settings, how documents are created and separated in the batch, whether metadata fields are available, whether and how bar codes are processed, and what happens next to batches after you release them.
- It determines whether you can capture documents only, capture and [index](#) documents, or index documents only.
- It determines whether non-image electronic files (for example, PDF documents) should be retained in their original format, converted to an image format, or prevented from being imported.
- It identifies the set of metadata fields to complete for a selected document.

If your client profile includes indexing, you can assign metadata values to documents such as a customer ID and name. Documents of different types in a batch typically have different sets of metadata fields available. You can assign metadata values to documents in index-only batches, but cannot append, insert, or replace pages.

When you're done working on the documents in a batch, you release the batch, which unlocks it from your exclusive use (if there are no release processes defined). If you release a batch and selected an available release process, the next action performed on the batch depends on that release process. What happens next depends on the client profile settings:

- The batch may be removed from the batch pane list and committed to Oracle Content Management, or it may be placed in a queue for further processing such as PDF/TIFF conversion or bar code recognition.
- The batch may remain in the list but unlocked (no lock icon is shown). This allows you or another user to lock the batch and make further changes.

# 3

## Learn About the Main Content Capture Components

There are three main components to capturing content for Oracle Content Management:

- the [Capture Procedures page](#) in the Oracle Content Management web interface,
- the [Content Capture Client](#), and
- the [Content Capture File Import Agent](#).

### Capture Procedures Page

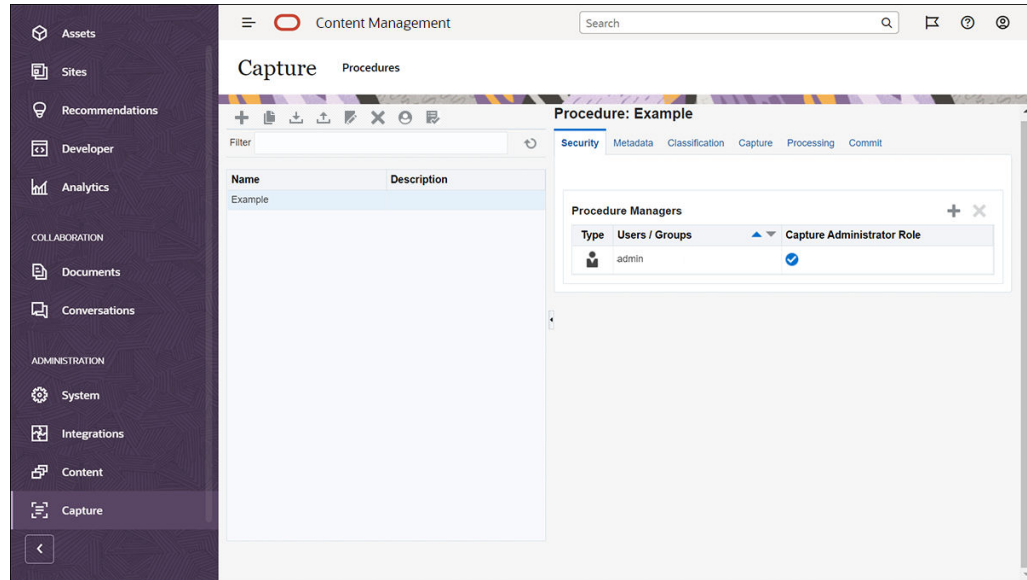
The Capture Procedures page in the Oracle Content Management web interface is where content procedure managers set up and configure content capture workflows, or [procedures](#). Each procedure represents a complete content capture system, providing a centralized location to configure metadata, processing rules, configuration profiles, and batch data for a particular environment. Content Capture Client users create and access batches within the procedure to which they've been granted access.

You can create multiple procedures for your organization, so you can efficiently manage all your content capture and processing needs, for example by department or location. You can also share common configuration elements between procedures for optimal reuse. And you can copy a procedure for easy adaptation for another environment.

Each procedure has six main configuration areas:

- **Security**—This specifies which users have access to the procedure and what their roles are.
- **Metadata**—This configures the [metadata fields](#) and user-defined or dependent choice lists available to Content Capture Client users as they index and process documents in a batch.
- **Classification**—This defines the [batch statuses](#), [attachment types](#), and [document profiles](#) available in the content capture procedure.
- **Capture**—This defines the [client profiles](#), which automate the content capturing process for client users, as well as [import processor jobs](#), which define how documents are imported and organized within the procedure.
- **Processing**—This defines [recognition processor jobs](#), which process bar codes in documents, as well as [conversion jobs to PDF](#) or [TIFF](#), which automate how image and non-image documents should be converted and how attachments are processed.
- **Commit**—This defines how captured and processed documents in a completed batch are uploaded to Oracle Content Management and what happens if any errors are encountered.

See [Setting Up Procedures](#) for more information.

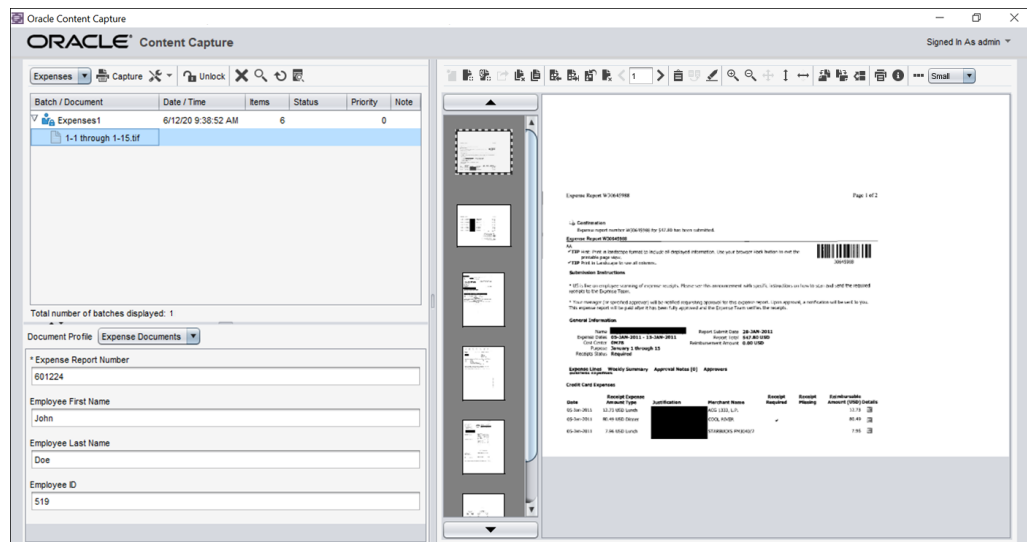


## Content Capture Client

The Content Capture Client is an application that you install on your local computer to perform these tasks:

- [Scan](#) and [import](#) documents, using the industry-standard TWAIN interface to scan from desktop scanners or other TWAIN-compliant input devices
- [Review and edit documents](#)
- [Index documents](#) (assign metadata to them)
- [Release documents](#) so that they can be further processed.

You can [download](#) the Content Capture Client from the Oracle Content Management web interface. After you start the Content Capture Client and log in to Oracle Content Management, you can select any of the client profiles you've been granted access to. A client profile defines all configuration settings for scanning, importing, and indexing documents in a batch.



The Content Capture Client provides a single window with three distinct work areas, or panes:

- **Batch pane**—The batch pane in the upper left is fixed, while the other panes change, depending on your selection in the batch pane. This is where you [manage your batches](#). When you select a batch in the batch pane, its information is displayed in the right pane to view or edit. For example, change the batch status or priority, or include a note as a reminder or for others to view. The lock information is shown below the batch information.
- **Document pane**—When you select a document or a document attachment in the batch pane, the document pane is displayed on the right. It shows the documents in the batch, their thumbnail images, and document action icons in a top toolbar. You can [review and edit](#) documents as needed.
- **Metadata pane**—The metadata pane in the lower left displays metadata fields for [indexing documents](#). The metadata pane is available only if indexing is configured for the selected client profile.

See [Scanning and Importing Documents](#) for more information.

## Content Capture File Import Agent

A common system integration model delivers content from internal services to Content Capture via local shared file systems; however, when the content capture functionality shifts into a Cloud environment a file system based integration is no longer possible due to the Oracle Cloud security. The file import agent is designed to continue to provide those simple integration models.

The file import agent is a small command-line application that runs on any computer and serves as the source for importing content from a monitored file system location such as a folder or network drive. It monitors and captures the content in that location and feeds it to the import processor for further processing and routing according to the rules defined in the procedure.

You can [download](#) the file import agent from the Oracle Content Management web interface. See [Setting Up Automated File Import](#) for more information.

# 4

## Learn About Roles and Security

Access to many features in Oracle Content Management is controlled by roles and privileges that service administrators grant to each user. To access the content capture functionality, you must have either of these roles in Oracle Content Management:

- **CECCaptureAdministrator** (for procedure managers)
- **CECCaptureClient** (for Content Capture Client users)

See Roles in *Administering Oracle Content Management* for more information on roles and privileges.

There are basically three types of users in the context of capturing content:

- **System administrators** configure the content capture functionality within the overall Oracle Content Management system, map users or groups to the content capture roles, and monitor capture processing.
- **Procedure managers** design and customize workflows, or [procedures](#), which are used to process physical and electronic documents in bulk for various business scenarios. The content capture flows are accessible through client profiles.

Procedure managers automatically have read/write access to procedures they create. They can add, edit, copy, and delete procedures, and configure profiles and processor jobs. To access any other procedure, its manager must grant others access to it on the Security tab.

- **Users** work with the Content Capture Client to [scan or import documents](#) into Oracle Content Management. They use client profiles to process documents, which involves reorganizing and regrouping of documents, converting them into a supported format, recognizing barcodes, and indexing to make them searchable in Oracle Content Management, where the processed documents are automatically stored. Users must have the required privileges to sign in to and access the Content Capture Client, and they can only see and select those client profiles to which they have been granted access. These end-users create batch-related content within a procedure, including batches, documents, attachments, and pages.

### Note:

Procedure managers are typically assigned both the manager and user roles, so they can configure procedures and test them in the client.



# Part II

## Setting Up Procedures

Procedures are defined content capture workflows, from the initial sourcing all the way to final upload to Oracle Content Management. Each procedure represents a complete content capture system, providing a centralized location to configure metadata, processing rules, configuration profiles, and batch data for a particular environment.

Oracle Content Management allows you to create any number of procedures to suit all your content capture needs. A procedure includes document, client, and commit profiles, and all configurations associated with them. It can include as many client, document, and commit profiles as your organization requires. You can reuse configurations across multiple profiles. In the client environment, if users' role permits, they can choose client profiles and suitable document profiles to process document batches.

A procedure includes metadata based on client users' business type. This data could be customer or employee ID, phone number, date of birth, or an entirely different set of items. You configure a procedure to convert documents in to formats such as PDF, TIFF, or JPEG. You also create bar codes definitions for indexing, filtering, and search.

When you configure **document profiles**, you associate metadata and attachment format types with them. In an import job, you can choose a document profile to assign to imported documents. Or, you can configure a recognition job to dynamically determine the document profile. When you configure bar code definitions, document organization settings, you need to associate them with a relevant document profile, too.

In a **client profile**, you configure what client users can do in the client environment and how. You also associate one or more document profiles with it. That is, some users' job includes only capturing documents, some are responsible for generating indexes for document batches, and some do both. In client profiles, you also specify batch prefixes, batch priority, criteria for filtering batches (priority, status, prefix, and so on). To restrict client profile use, you can assign them users so that only users with sufficient rights can access client profiles in the client environment.

In **commit profiles**, you configure the Oracle Content Management commit driver settings. You can also restrict commit operations to a document profile so that users can check in only those documents to the repository that meet the criteria specified in the document profile.

### Note:

The configuration tabs in the Capture Procedures page are ordered corresponding to the flow of data through the *capture*, *processing*, and *commit* steps; however, when configuring a procedure, the most efficient path is achieved by working in the reverse order since the initial steps must link to already defined subsequent steps.

### Create Procedures

- [Get to Know the Capture Procedures Page](#)
- [Create a New Procedure](#)

- [Manage Your Procedures](#)

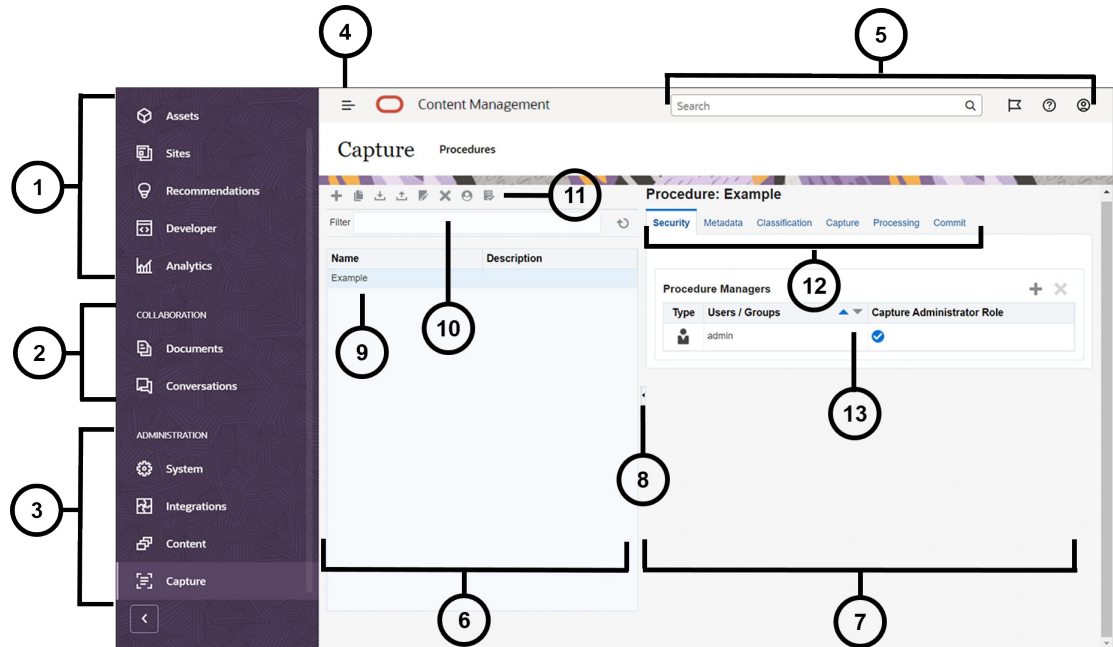
### **Configure Procedures**

- [Configure Procedure Security](#)
- [Configure Metadata](#)
- [Configure Classification](#)
- [Configure Capture Settings](#)
- [Configure Processing Settings](#)
- [Configure Commit Profiles](#)








# 5

## Get to Know the Capture Procedures Page

Your Capture Procedures page is where you configure the infrastructure that determines the document metadata and how tasks such as importing, indexing, bar code recognition, and grouping of documents are automated in the client environment. Let's take a look at what you can do on this page.



Item	Description
1	The <b>navigation panel</b> is where you can switch between Oracle Content Management features. The options you see on this panel depend on the user role you've been given. For example, only enterprise users will see options for <b>Assets</b> . Click <b>Home</b> to display a page that includes links to recent items, documentation, guided tours, and other helpful links.
2	The <b>collaboration section</b> provides access to your documents and conversations.
3	If you have administrative privileges, you'll see the <b>administration section</b> , where you can set up system-wide options; integrate Oracle Content Management with other services; configure repositories, localization policies, and other features related to digital asset management; and <a href="#">set up content capture procedures</a> .
4	Click the <b>show/hide</b> icon to open or close the navigation panel.
5	The <b>user area</b> is where you can change your preferences or find the desktop and mobile apps. Click your user picture to change your defaults. If you have notifications from conversations, the flag will show the number of notifications.
6	The left side of the page is for <b>procedures management</b> , where you create, edit, delete, import, and export procedures.
7	The right side of the page is for <b>procedures configuration</b> , where you customize each procedure for specific content capture environments.
8	Click the icon to <b>show or hide</b> the procedures management side of the page.
9	The <b>procedures list</b> shows all procedures that you've created or have access to.

Item	Description
10	In the <b>Filter</b> field, you can specify keywords to <a href="#">filter the procedures</a> in the list. This feature is useful when you have a large number of procedures.
11	<p>The <b>procedures toolbar</b> is where you create, edit, copy, export, and import procedures. The last icon on the toolbar lets you specify if you use a screen reader.</p> <ul style="list-style-type: none"> <li>•  : <a href="#">Create a new procedure</a> in which you'll configure how client users will capture and process content that will be stored in Oracle Content Management.</li> <li>•  : <a href="#">Copy a procedure</a>. Use this option if you want to create a new procedure based on an existing procedure.</li> <li>•  : <a href="#">Export a procedure</a> from a test environment and import it to a production environment.</li> <li>•  : <a href="#">Import a procedure</a>. Use this feature if you want to migrate procedures between test and production environments.</li> <li>•  : <a href="#">Edit a procedure</a>. Use this feature if you want to modify a procedure name, description, or configuration.</li> <li>•  : Use this feature when you want to <a href="#">delete a procedure</a>.</li> <li>• Validate a procedure: Use this feature to diagnose errors, if any, in various elements of your procedure.</li> <li>•  : Click this accessibility icon to specify if you're using a screen reader.</li> </ul>
12	<p>When you select a procedure on the left, a number of <b>configuration tabs</b> become available, which you use to define the procedure settings:</p> <ul style="list-style-type: none"> <li>• On the <b>Security</b> tab, you configure users' access to procedures.</li> <li>• On the <b>Metadata</b> tab, you define <a href="#">choice lists</a> and their <a href="#">dependent choice lists</a>. These choices offer client users the flexibility to set their metadata preferences during document processing.</li> <li>• On the <b>Classifications</b> tab, you <a href="#">define batch statuses</a> that client users assign to their document batches. On this tab, you also <a href="#">define the types of the documents that are supplementary</a> to the primary documents. Lastly, you can <a href="#">define document profiles</a> that include the metadata fields of the documents that users process in the client environment.</li> <li>• On the <b>Capture</b> tab, you <a href="#">create client profiles</a> that govern what users can see in a batch, how a batch should be processed, how to handle non-image and image documents, and so on. On this tab, you also create jobs to <a href="#">define the source</a> from which documents should be imported into Oracle Content Management.</li> <li>• On the <b>Processing</b> tab, you <a href="#">define recognition jobs</a> in which you specify whether bar codes should be recognized for purposes of billing or indexing to enable quick search. You can also define how documents should be organized during processing. On this tab, you also <a href="#">define conversion jobs to PDF</a> and <a href="#">to TIFF</a> to automate how image and non-image documents should be converted and how attachments are processed. Other jobs that you can define are <a href="#">asset lookup jobs</a>, <a href="#">XML transformation jobs</a>, <a href="#">taxonomy jobs</a>, <a href="#">Configure External Processor Jobs</a>, <a href="#">Configure Conditional Assignment Jobs</a>, and <a href="#">OCR processor jobs</a>.</li> <li>• On the <b>Commit</b> tab, you configure a commit driver (<a href="#">Documents Folder</a>, <a href="#">Asset Repository</a>, or <a href="#">Business Repository</a>) so the processed documents are uploaded and stored in Oracle Content Management.</li> </ul>
13	This is where you configure the options for each of the functional areas in the tabs. What you see here depends on the configuration tab you're on and what selections you've made.

# 6

## Create a New Procedure


A procedure represents a complete content capture environment, containing metadata, configuration profiles, and physical data for a particular environment. As a procedure manager, you can create and maintain several procedures to serve the client users' varied needs. In your procedures, you configure settings that enable the client users to capture and process a variety of document sets in bulk, each requiring unique processing. The users are required to process various business documents according to the different business standards that apply to those documents. For instance, expense reports may need to be processed differently from medical bills. You work with the client users to identify how documents should be organized, if a document set should contain blank pages, if it should include attachments, if barcodes should be read for business processing, if documents should be indexed, and how each batch of documents should be committed, and so on.



### Note:

If you are using Oracle Content Management Starter Edition, you can only create a single procedure in Content Capture. If you want to create more than one procedure, you need to upgrade to Oracle Content Management Premium Edition. For more information, see [Starter vs. Premium Edition](#).

If you are the first procedure manager to use the Procedures page, you'll see an empty list. To add a procedure:

1. On the Capture Procedures page, click  in the procedures pane on the left.
2. In the **Create New Procedure** dialog, enter a name for the procedure and click **OK**.

The procedure configuration tabs are displayed on the right. Notice that the **Security** tab displays your user name in the **Procedure Managers** table, configured by the system administrator during installation and initial configuration. You have procedure manager access to the procedure and can grant other managers access to it.

You work with these tabs when configuring your procedure. If your procedure is not open, click it in the left navigation pane to open its configuration pages on the right.

Procedure Tab	Task
Security	On this page, you can grant procedure access to other people. See <a href="#">Configure Procedure Security</a> .
Metadata	On this page, you can perform these tasks: <ul style="list-style-type: none"><li>• <a href="#">Configure Metadata Fields</a></li><li>• <a href="#">Configure User Defined Choice Lists</a></li><li>• <a href="#">Configure Dependent Choice Lists</a></li></ul>

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<b>Procedure Tab</b>	<b>Task</b>
Classification	On this page, you can perform these tasks: <ul style="list-style-type: none"><li>• <a href="#">Add, Edit, or Delete Batch Statuses</a></li><li>• <a href="#">Add, Edit, or Delete Attachment Types</a></li><li>• <a href="#">Configure Document Profiles</a></li></ul>
Capture	On this page, you can perform these tasks: <ul style="list-style-type: none"><li>• <a href="#">Configure Client Profiles</a></li><li>• <a href="#">Configure Import Processor Jobs</a></li></ul>
Processing	On this page, you can perform these tasks: <ul style="list-style-type: none"><li>• <a href="#">Configure Conversion Jobs to PDF</a></li><li>• <a href="#">Configure Conversion Jobs to TIFF</a></li><li>• <a href="#">Configure Recognition Processor Jobs</a></li></ul>
Commit	On this page, you can configure <a href="#">commit profiles</a> .

---

# 7

## Manage Your Procedures

On the Procedure page, you can create your procedures and edit them later if requirements change. If you're going to manage several procedures, you can use the filter feature on this page to easily find them by context. If you want to create a new procedure that is based on an existing one, use the copy feature. You can also move procedures to another location using the export and import features.

Here is what you can do when you've already created some procedures:

- [Filter a Procedure](#)
- [Edit a Procedure](#)
- [Delete a Procedure](#)
- [Copy a Procedure](#)
- [Validate a Procedure](#)
- [Export or Import a Procedure](#)

### Filter a Procedure

If you manage many procedures, you may find it useful to limit the procedure list by filtering it. Filtering makes it easy for you to quickly find a procedure when you need it.

To filter a procedure:


1. On your Capture Procedures page, navigate to the procedures pane on the left.
2. In the **Filter** field, enter the full name of the procedure, or use % as a wildcard to match one or more characters. For example, enter %**capture**% to display procedures with *capture* in their names or descriptions. Filters are case-sensitive.

The procedures that match the specified filter are displayed in the table below the **Filter** field.

### Edit a Procedure

You can edit a procedure name and description any time after you have created your procedure.

To edit a procedure:

1. On your Capture Procedures page, navigate to the procedures pane on the left.
2. Select the procedure you want to edit and click .
3. In the **Edit Procedure Name and Description** dialog, change the procedure name and how you describe the procedure.


The changes reflect in the procedures table.

You can edit the configuration settings on the tabs that are displayed on the right side when a procedure is open.

## Delete a Procedure

When you delete a procedure, all of its batch data and configurations, including metadata, profiles, and processor jobs, are removed. If you delete a procedure while its batches are being processed, then these batches are also deleted.


To delete a procedure:

1. On your Capture Procedures page, navigate to the procedures pane on the left.
2. Select the procedure you want to delete and click . When prompted, confirm that you want to delete the procedure.

## Copy a Procedure

You can copy a procedure if you want to use it as a starting point for a new procedure and then modify the configuration as needed. This allows you to quickly set up procedures that are similar.

To copy a procedure:


1. On your Capture Procedures page, navigate to the procedures pane on the left.
2. Select the procedure you want to copy and click .
3. In the **Copy Procedure** dialog, change the procedure name and description.

This procedure is displayed in the list of procedures on the left.

## Validate a Procedure

You can diagnose errors, if any, in your procedures by running a validation through the Validate a Procedure icon on the procedure toolbar.

You can validate multiple procedures by selecting them simultaneously in the procedures pane on the left side. To validate a procedure:

1. On your Procedures page, navigate to the procedures pane on the left.
2. Select the procedure you want to validate and click the  icon on the toolbar. You can run validation on different elements of your procedure.

Validation issues are displayed in the **Messages** column of the Validate Procedure Issues dialog. Some examples of validation are: if correct repository type is chosen in the commit profile, if an imported procedure has errors such as missing content types and mappings, character mismatch between the names of the asset types as configured in the repository and as configured in the procedure, and so on. Since the messages could be lengthy, the complete message displays below the table under **Validation Message** in the dialog once you select the message.

3. After reviewing the issues, close the dialog.



 **Note:**


The email validation may report a valid email if the password was just changed (in the last minute or two).

## Export or Import a Procedure


You can export and import procedures between different environments such as development, test, and production. When you import a procedure, make sure its identifier is unique.

To export and import a procedure:

1. On your Capture Procedures page, navigate to the procedures pane on the left.

2. Select the procedure you want to export and click  on the toolbar.

The XML configuration file for your procedure is downloaded to your local computer. You can modify the procedure name in the file if you want.

3. In your other system, open the Capture Procedures page and click  on the toolbar.
4. In the **Import Procedure** dialog, click **Choose File** and select the XML file of the procedure you want to import.
5. Enter a meaningful name and description for the procedure in the **Name** and **Description** fields respectively, and then click **Process**.

The message that the import is completed is displayed.

6. Click **Close**.



The procedure is included in the procedures list on the left.

# 8

## Configure Procedure Security

You can grant another manager an access to your procedure on the **Security** tab.

To configure procedure security:

1. In the procedures pane on the left, select the procedure you want to configure.  
The configuration pages for the selected procedure appear on the right.
2. Click the **Security** tab.  
The Procedure Managers table lists managers with access to the procedure, including yourself. To sort the **Users/Groups** column, click one of the triangles in the column.  
A check mark indicates an access level of Procedure Manager.
3. Click  to display the Add Security Member dialog.  
In the **Procedure Managers** table, you can delete a manager's access by selecting the manager and then clicking the table's .
4. In the left field below, select **Search Groups** or **Search Users** to find members belonging to the selected role.
5. In the adjacent text field, optionally search for a specific group or user name by entering a partial or full name. You can use the '\*' character as a wildcard. Leave the text field blank to return all members. Click **Search**.
6. From the search results, select one or more members (holding down the Ctrl key to select multiple members) and click **Add**.  
Each added member is included in the table.

# 9

## Configure Metadata

The metadata fields you create in your procedure become available in the Content Capture Client environment through the document profiles to which you associate them. Client users, who have the required rights, choose document profiles relevant to their capturing tasks. And, they use the metadata and choice lists to standardize specific metadata field values and prevent data entry errors. On the Metadata tab, you can also configure asset synchronizations and asset lookups. When you enable lookups for a client profile on the Capture tab, client users that use this profile can leverage asset lookups to search content relevant to their business.

Here is what you do when you're configuring metadata in a procedure:

- [Configure Metadata Fields](#)
- [Configure User Defined Choice Lists](#)
- [Configure Asset Type Choice Lists](#)
- [Configure Dependent Choice Lists](#)
- [Configure Asset Synchronizations](#)
- [Configure Asset Lookups](#)

### Configure Metadata Fields



You define the metadata fields of your procedure to make them available in the Content Capture Client during document indexing and batch processing. You can configure metadata fields in a variety of ways. Metadata fields can be made mandatory, which means they must be completed to allow a document to be successfully committed. Metadata values can also be auto populated, derived from bar codes read by the recognition processor, or selected from choice lists.

Here are the tasks you do when you are configuring metadata fields:

- [Add or Edit a Metadata Field](#)
- [Delete a Metadata Field](#)
- [Configure a Metadata Field's Input Mask](#)
- [Configure a Metadata Field's Display Format](#)
- [Set Metadata Fields to Auto Populate](#)
- [Configure Regular Expression Validation](#)
- [Configure Metadata Fields to Enable Asset Type Choice List Creation](#)

### Add or Edit a Metadata Field

To add or edit a metadata field:

1. Log in to the Oracle Content Management web interface and click **Capture** in the left navigation menu (under **Administration**). If you don't see this option, you don't have the required access privileges.
2. In the procedures pane on the left, select the procedure you want to configure. The configuration pages for the selected procedure are displayed on the right.
3. Open the **Metadata** tab of your procedure.
4. In the **Metadata Fields** table, click  to add a field. To edit a field, select it in the table and click .
5. In the **Field Name** field, enter a name for the metadata field.
6. In the **Data Type** drop-down list, select a type for the field. You can choose: **Alpha Numeric**, **Category Reference**, **Content Item Reference**, **Digital Asset Reference**, **Numeric**, **Date**, **Float**, **Language**, or **Path**.

Data Type	Description
Alpha Numeric	Data that is both letters and numbers.
Category Reference	Holds/assigns a taxonomy category.
Content Item Reference	Holds/assigns a reference of a content item in Oracle Content Management.
Digital Asset Reference	Holds/assigns a reference of a digital asset in Oracle Content Management.
Numeric	Data that is in the form of numbers.
Date	Contains date values, time values, or date and time values
Float	Data that is a number not an integer. It includes a fraction represented in decimal format.
Language	Holds a valid language code supported by Oracle Content Management.
Path	<p>The Path data type can neither be multiline nor can its value be validated by choice lists or taxonomies. Its only Auto Populate type is Default Value. The Path type doesn't have an input mask. If you select the Path data type, the <b>Invalid Character Handling</b> section is displayed with these choices:</p> <ul style="list-style-type: none"> <li>• <b>Remove:</b> Invalid characters are removed from the string.</li> <li>• <b>Replace with Underscore:</b> Invalid characters are replaced with underscores.</li> <li>• <b>Blank Path:</b> The path variable is cleared of any value instead of accepting an invalid value. For any non-string fields included in the path, the formatting options associated with the field definition are used to produce the string value. For instance, if the field type is Date and has a format of YYYY-MM-DD, the value of May 15th would appear like 2022-05-15.</li> </ul>

 **Note:**

7. Select the **Multiline** check box if you want the **Default Value** autopopulate type to support multiple lines of text such as address 1 on line 1, address 2 on line 2, and so on. Once you select this check box, the text box for the **Default Value**

autopopulate type is changed into a text area that supports multiple lines. (Other fields on this page that are not relevant for the text area are disabled.)


8. To make the field mandatory, select the **Required** checkbox. A document's required fields must contain values to be committed by the commit processor.
9. To make a metadata field uneditable in the Content Capture Client, select the **Locked** check box.
10. [Configure an input mask.](#)
11. [Configure a display format.](#)
12. In the choice list fields, identify previously created sources and choice lists for the metadata field. See [Add or Edit a User Defined Choice List](#).
13. In the **Taxonomy** drop-down list, select a suitable option from those available to you.
14. [Configure auto populating.](#)
15. [Configure and test a regular expression validation.](#)
16. When done, click **Submit**.

After adding a metadata field, you can use it throughout the procedure. Editing a metadata field changes it wherever it is used.

## Delete a Metadata Field

Deleting a metadata field permanently removes it from the procedures in which this field is used. If you delete a metadata field that is in use in a client profile or a batch processor, errors may occur at different stages of batch processing. Before deleting a metadata field, ensure that it is not mapped to metadata fields in a commit profile.

To delete a metadata field from a selected procedure:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Metadata** tab of the procedure.
3. To delete a metadata field, select it in the **Metadata Fields** table and click .
4. Click **Yes** to confirm that you want to delete this metadata field.  
The metadata field is removed from the procedure.

## Configure a Metadata Field's Input Mask

An input mask is a filter that controls what you can enter in a metadata field. For example, a mask might allow you to enter numbers but not alphabetic characters. The application doesn't accept a character that does not conform to the mask.

To configure an input mask:

1. [Add or edit a metadata field.](#)  
To apply an input mask, the metadata field's data type must be **Alpha Numeric**, **Numeric**, or **Float**.

2. On the **Metadata Field** page, in the **Input Mask** field, enter any of the available mask characters listed in the tables after the steps. Any other characters you include are treated as literals.
3. Click **Submit**.

The settings of the metadata field are saved and available for use. You can now test the input mask through the client.

**Table 9-1 Alphanumeric Input Mask Characters**

Mask Character	Description
#	Requires a number to be entered.
' (single quote)	Escape character to skip any of the special formatting characters.
U	Accepts any letter and converts it to uppercase.
L	Accepts any letter and converts it to lowercase.
A	Accepts any letter or number.
?	Accepts any letter.
*	Accepts any character.
H	Accepts any hexadecimal character (0-9, a-f, or A-F).

**Table 9-2 Alphanumeric Input Mask Examples**

Input Mask	Description	Example Format
###-##-####	Social Security Number	123-45-6789
UU	State	AZ

**Table 9-3 Numeric and Float Input Mask Characters**

Mask Character	Description
0	Requires a digit to be entered.
#	Requires a digit to be entered. If you enter zero as a value, it is considered absent. For example, 12.0 is considered 12. But if you enter 12.5, it is considered 12.5.
.	Include as a decimal separator or monetary decimal separator.
-	Include as a minus sign.
,	Include as a grouping separator.
;	Include to separate positive and negative subpatterns.

 **Note:**

A `DecimalFormat` pattern contains a positive and negative subpattern; for example, `"#,##0.00;(#,##0.00)"`. Each subpattern has a prefix, numeric part, and suffix. The negative subpattern is optional; if absent, then the positive subpattern prefixed with the localized minus sign ('-' in most locales) is used as the negative subpattern. That is, `"0.00"` alone is equivalent to `"0.00;-0.00"`. If there is an explicit negative subpattern, it serves only to specify the negative prefix and suffix; the number of digits, minimal digits, and other characteristics are all the same as the positive pattern. This means that `"#,##0.0#;(#)"` produces precisely the same behavior as `"#,##0.0#;(#,##0.0#)"`.

To allow the user to enter decimal values, you must create a format that forces at least one decimal (`#.0#`). In the client, to change a number's sign, enter the number first, then press the + or the - key.

**Table 9-4 Numeric and Float Input Mask Examples**

Input Mask	Description	Example Format
<code>#,###.0##</code>	Decimal Value	1,234.567
<code>#,##0.00</code>	Currency	2,500.00

## Configure a Metadata Field's Display Format

When you define the display format in a procedure, the data entered using the client displays in this format irrespective of what you specify in the client.

To set up a display format that changes metadata value display:

1. [Add or edit a metadata field.](#)

To apply a display format, the data type of the metadata field must be **Numeric**, **Date**, or **Float**.

2. On the Metadata Field page, next to the **Display Format** field, click **Select Display Format**, choose from the available formats for the data type listed in the table, and then click **Submit**.

Input Format	Data Type	Description
Currency	Float	Number formatted using the system locale currency.
General Date	Date	A medium date followed by a medium time. Date display is determined by the system locale settings.
Short Date	Date	Date using the system short date format. Date display is determined by the system locale settings.
Medium Date	Date	Date using the system medium date format. Date display is determined by the system locale settings.
Long Date	Date	Date using the system long date format. Date display is determined by the system locale settings.
Short Time	Date	Time using the 24-hour format; for example, 17:45.

Input Format	Data Type	Description
Medium Time	Date	Time in 12-hour format using hours and minutes and the AM/PM designator.
Long Time	Date	Time using the system long time format; includes hours, minutes, seconds.
General Number	Numeric, Float	Number with no grouping separator (for example, 7500).
Fixed Number	Numeric, Float	At least one digit to the left and two digits to the right of the decimal separator (for example, 7500.16).
Standard Number	Numeric, Float	Number with grouping 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	Date	Select from one of the following date formats: yyyy-MM-dd yyyy-MM-dd HH:mm yyyy-MM-dd HH:mm:ss MM-dd-yyyy MM-dd-yyyy HH:mm MM-dd-yyyy HH:mm:ss dd-MM-yyyy dd-MM-yyyy HH:mm dd-MM-yyyy HH:mm:ss MM/dd/yyyy MM/dd/yyyy HH:mm MM/dd/yyyy HH:mm:ss yyyy/MM/dd yyyy/MM/dd HH:mm yyyy/MM/dd HH:mm:ss dd/MM/yyyy dd/MM/yyyy HH:mm dd/MM/yyyy HH:mm:ss

The metadata field settings are now saved. You can use and test the metadata field display format in the client.

## Set Metadata Fields to Auto Populate

You can configure metadata fields to automatically contain certain values. For example, you might want to automatically populate a date field with a batch's scan date instead of having users enter it. Or, you might provide a default value for a field that users can change.

To configure a metadata field to auto populate:

1. [Add or edit a metadata field.](#)
2. In the **Auto Populate Type** field of the Metadata Field page, select a type for the metadata field. The available auto populate types depend on the selected metadata field's type listed in this table:

Auto Populate Type	Data Type	Description
Batch Name	Alpha Numeric	Populates the metadata field with the assigned batch name.



Auto Populate Type	Data Type	Description
Batch Priority	Alpha Numeric, Numeric, Float	Populates the metadata field with the priority assigned to the batch.
Batch Status	Alpha Numeric	Populates the metadata field with the status (if any) to the batch.
Computer Name	Alpha Numeric	Populates the metadata field with the name of the computer used when the document was created.
Current Date	Date	Populates the metadata field with the current date.
Default Value	Alpha Numeric, Numeric, Date, Float, Category Reference, Language, Path	Populates the metadata field with the value specified in the <b>Default Value</b> field. If you selected the <b>Multiline</b> check box at the time of adding a metadata field, a text box is displayed for the default value type in which you can enter multiple lines of text such as address 1 on line 1, address 2 on line 2. A similar box is displayed in the Batch pane in the Capture Client environment for the document profile to which this metadata configuration is assigned.
Document Profile	Alpha Numeric	Populates the metadata field with the document profile name assigned to the selected document.
Profile Name	Alpha Numeric	Populates the metadata field with the client profile used to capture the batch.
Scan Date	Date	Populates the metadata field with the date on which the document was captured.
User ID	Alpha Numeric	Populates the metadata field with the ID of the user to whom the batch was locked when the document was created.

3. If you selected **Default Value** as the auto populate type, enter or select a value in the **Default Value** field. In case of some data types, you can select the category you want to set as default in the **Category** dialog, which is displayed when you click **Choose Category**. Then click **Submit**.

The metadata field settings are now saved. Use and test the auto-populate setting in the client.

## Configure Regular Expression Validation

Regular expressions in metadata fields apply only to alphanumeric type fields. For more information, see documentation relating to using and formatting regular expressions, such as the following:

<http://docs.oracle.com/javase/tutorial/essential/regex/>

To configure and test a regular expression:

1. [Add or edit a metadata field](#).
2. On the Metadata Field page, enter an expression in the **Regular Expression Validation** field.
3. To test the regular expression, enter a sample value in the **Sample Value** field, then click **Validate**.

A result of **Valid** or **Invalid** displays next to the **Results** read-only field.

4. Click **Submit**.

The metadata field settings are now saved. You can use and test the metadata field's regular expression in the client.

## Configure Metadata Fields to Enable Asset Type Choice List Creation

To configure metadata fields for asset type choice lists:

1. [Add or edit a metadata field.](#)
2. On the Metadata Field page, from the **Data Type** drop-down list, select **Alpha Numeric**, **Content Item Reference**, **Digital Asset Reference**, **Date**, **Float**, or **Numeric**.

Data Type	Choice List Source	Parent Choice List Field	Choice List
Alpha Numeric	Asset Type	Disabled	Asset Type choice lists of alpha numeric, numeric, date, and float type
Content Item Reference	Asset Type selected by default. Can't be changed.	Disabled	Content Item choice lists of alpha numeric, numeric, date, and float type
Digital Asset Reference	Asset Type selected by default. Can't be changed.	Disabled	Asset Type choice lists of all data types: alpha numeric, numeric, date, and float
Date	Asset Type	Disabled	Asset Type choice lists of the Date type
Float	Asset Type	Disabled	Asset Type choice lists of the Float type
Numeric	Asset Type	Disabled	Asset Type choice lists of the Numeric type

3. Click **Submit**.

The metadata definition is ready. You can now create asset type choice lists based on this metadata definition.

## System-Provided Metadata Fields

Fields described in the tables below are the system values provided by Content Capture relative to the context of a particular action.

**Table 9-5 System-Provided Metadata Fields for a Folder Import Job**

System Attribute	Description and value for example path for file being imported (/import/expenses/20200426/Customer1.pdf)	Sample Value
File name	The full file name	Customer1.pdf
Base file name	The file name without the extension	Customer1
File extension	The extension of the file	.pdf

**Table 9-5 (Cont.) System-Provided Metadata Fields for a Folder Import Job**

System Attribute	Description and value for example path for file being imported (/import/expenses/20200426/Customer1.pdf)	Sample Value
Folder path	The full path of the folder	/import/expenses/20200426
Folder name	The name of the folder	20200426
Full file path	The full file path	/import/expenses/20200426/ Customer1.pdf
File modified date/time	File modified date/time - system value	
Source	Host name of the computer on which the <a href="#">file import agent</a> is installed	<host name>

**Table 9-6 System-Provided Metadata Fields for a List File Import Job**

System Attribute	Value for example path for list file or actual document being imported	Sample Value
File extension	The extension of the file	.txt
Base file name	The file name without the extension	output
File name	The full file name	output.txt
Folder name	The name of the folder	Documents
Folder path	The full path of the folder	C:\Users\example\ Documents
Relative folder path	The path relative to the folder being monitored by the import agent	/Documents
Full file path	The full file path	C:\Users\example\ Documents\output. txt
Source	Host name of the computer on which the <a href="#">file import agent</a> is installed	<host name>

**Table 9-7 System-Provided Metadata Fields for an Email Import Job**

System Attribute	Description	Value
From Name	Name alias of <i>from</i> address	John Doe
From Address	Sender's email address	john.doe@example .com
Reply To Name	Name to which the reply is sent	John Doe
Reply To Address	Email address to which the reply is sent	john.doe@example .com
Recipient Names	Collection of recipient names for the message	Administrator
Recipient Addresses	Collection of recipient address for the message	administrator@exa mple.com
Folder	Folder name from which the message was obtained	Inbox

**Table 9-7 (Cont.) System-Provided Metadata Fields for an Email Import Job**

System Attribute	Description	Value
Language	If the source email system has included the language of the email from the sender, Content Capture exposes that value for mapping. This option is only available if the source email server provides the language. It may not appear in the list of system attributes.	English (United States)
Received Date	Date and time message was received	September 9, 2022 3:29:26 PM
Sent Date	Date and time message was originally sent	September 9, 2022 3:29:23 PM
Subject	Subject of the message	Server Upgrade
Email Importance	Low, normal and high priority value of the message	1
MessageId	Unique ID of the message	5NAPGAGAGA3Rz6875mpSIOBBOZAAA
Source	Account email address configured for the email import job.	john.doe@example.com

**Table 9-8 System-Provided Metadata Fields Common Across All Import Jobs**

System Attribute	Description	Value
Import Date/Time	Date and time at which the batch was imported	September 9, 2022 1:42:20 PM
Import Job Name	Name assigned to the import processor job	Legal Documents
Default Value	Default value assigned as specified	09092022

**Table 9-9 General System-Provided Metadata Fields**

Field	Description	Sample Value
Batch Creation Date	Batch creation date (MM/DD/YY)	9/6/2022
Batch Id	Number value for batch Id	1
Batch Creation User Id	Id of the user who created the batch	John.Doe
Batch Last Modified Date	Last modified date (MM/DD/YY) in the Content Capture	9/6/2022
Batch Last Modified User	User who has modified the batch	John.Doe
Batch Name	Name of the Batch	Sample_Batch
Batch Priority	Numeric value of the batch priority	0
Batch Status	One of the batch statuses configured in Content Capture	Approved
Commit Date/Time	Current date (MM/DD/YY) when a batch is being committed	9/6/2022
Document Id	Internal alphanumeric Document Id	cdbfea12-be1b-4c8e-848f-4e7aa32dcb0c

**Table 9-9 (Cont.) General System-Provided Metadata Fields**

Field	Description	Sample Value
Document Last Modified Date	Last modified date (MM/DD/YY) of a document in the Content Capture	9/6/2022
Document Last Modified User Id	Id of the user who last modified the document	John.Doe
Document Profile Name	Name of the document profile to which document is assigned	MyDocuments
Document Title	Name of the document. If the document is an attachment, then it is the title of the parent document. File extension is not included in the name.	parentdocumentname
System Date Day	Day of the month in number	value 6 from 06\09\2022 (6 Sept 2022)
System Date Month	Month of the year in number	value 9 from 06\09\2022 (6 Sept 2022)
System Date Year	Year in number	value 2022 from 06\09\2022 (6 Sept 2022)
Timer	Long value in milliseconds	1662443094666 represents Tue Sep 06 2022 11:14:54
Source	Contains either user's workstation host name, import agent host name, or email Id	
Uniqueid	Randomly generated alphanumeric UUID	fd79ebdd-0830-4716-bcad-f871c7545669
Title	Title of the document or attachment. The file extension is not included in the title.	documentname

## Configure User Defined Choice Lists

You can use choice lists to standardize specific metadata field values or speed up indexing and prevent data entry errors. You create choice lists on the **Metadata** tab, then select them in a metadata field or processor job. This allows you to use the same choice list in multiple areas.

You can use *user-defined choice lists* to enter and maintain values in the content capture database. You can import choice list values into the content capture database from a text file as well as export choice list values to a text file.

Here are the main tasks you do when you are configuring user defined choice lists:




- [Add or Edit a User Defined Choice List](#)
- [Import Values From a Text File Into a Content Capture Choice List](#)
- [Export Content Capture Choice List Values to a Text File](#)
- [Delete a User Defined Choice List or Items](#)

- [Uses of User Defined Choice Lists](#)

## Add or Edit a User Defined Choice List


A user-defined choice list that you configure in your procedure is stored in Oracle Content Management.

For example, you might create a choice list to allow users to select a customer correspondence type of **Complaint**, **Satisfaction**, **Suggestion**, or **Other**.

1. On the procedure **Metadata** tab, under **User Defined Choice Lists**, select **Content Capture** in the table and click .
2. On the Choice List Type page, click  to add a choice list, or edit one by selecting it and clicking .
3. On the Capture Choice List page, enter a name in the **Choice List Name** field (for example, **Correspondence Type**) and select a type in the **Data Type** field (**Alpha Numeric**, **Numeric**, **Date**, or **Float**).

 **Note:**

To display the choice list values in a metadata field, the choice list must have the same data type as the metadata field.

4. To add a choice list item, click  in the **Choice List Items** table.
5. On the Choice List Item Properties page, enter a choice list value in the **Item Value** field.  
To display one value to users but commit another, enter a different value in the **Display Value** field of the item. To display the same value to users, click **OK** without entering a value in the **Display Value** field. Repeat steps 4 and 5 to add additional choice items.
6. Using the up and down or sorting ascending and descending arrow buttons, order choice list items as you want them displayed in the choice list and then click **Submit**.

The new choice list is displayed in the Defined Choice Lists table. If you want to use the choice list, see [Uses of User Defined Choice Lists](#).





If you want to use the choice list in a metadata field, first [add or edit a metadata field](#). Then:

- a. On the Metadata Field page, in the **Choice List Source** field, select **Capture Source**.
- b. In the **Choice List** field, select the choice list you created.

## Import Values From a Text File Into a Content Capture Choice List

You can import values from a UTF-8 text file into a user defined choice list. In UTF-8 text files, each choice list item record is delimited with a CR (carriage return)/LF (line feed). Each record line within the text file is imported as a choice list item. To import different values for the Item Value and Display Value, remember to use a TAB character to separate the values within an import record line.

To import values from a text file into a choice list:




1. [Add or edit a user defined choice list](#).
  - a. On the **Metadata** tab of the procedure, select **Content Capture** in the **User Defined Choice Lists** table and click .
  - b. In the **Defined Choice Lists** table, click  or  to add or edit a choice list.
2. In the **Choice List Items** table, click .
3. On the Import Choice List Items page, locate the file to import, and click **Open**.
4. Select the **Check for duplicates** field to check for and eliminate duplicate values and click **Process**. Keep in mind that importing large choice lists takes longer when this option is selected.

The choice list items are imported and displayed along with errors encountered in the Import Status area. You can define dependencies between choice lists and also use them in profiles or batch processor jobs. See [Uses of User Defined Choice Lists](#).

## Export Content Capture Choice List Values to a Text File

You can export a user defined choice list to a text file. The values of a selected choice are written to a delimited text file.

To export choice list values to a text file:




1. [Edit a user defined choice list](#).
  - a. On the **Metadata** tab of the procedure, select **Content Capture** in the **User Defined Choice Lists** table and click .
  - b. In the **Defined Choice Lists** table, select a choice list and click .
2. On the Content Capture Choice List page, click . You are asked to open or save the `export.txt` file. Choose save options.

The text file is written to the specified location.

## Delete a User Defined Choice List or Items

Deleting a choice list makes it unavailable in any client profile or processor in which it is used.

To delete a user defined choice list or items:

1. To delete a choice list, select it in the Defined Choice Lists table and click , confirming your action.
2. To delete a choice list item, select the choice list in the Defined Choice Lists table and click .
3. In the Choice List Items table, select an item and click , confirm, and then click **Submit**.

## Uses of User Defined Choice Lists

After creating one or more user defined choice lists, you can then:

- [Define dependencies](#) between them.
- Use them in content capture profiles or batch processor jobs as listed in this table:

Content Capture Component	Choice List Type	How It Is Used
Client profiles	Choice List Dependent Choice List	Use choice lists in metadata fields. See <a href="#">Add or Edit a Metadata Field</a> . Create dependent choice lists, where a selection in the parent field determines the values displayed in the child choice list field. Create a dependency, then select it in a client profile (see <a href="#">Add or Edit a Dependent Choice List</a> ).
Recognition processor	Choice List	Assign a bar code value that matches a choice list value to a metadata field. See <a href="#">Add or Edit Bar Code Definitions</a> .



## Configure Asset Type Choice Lists

You create asset type choice lists on the **Metadata** tab. Here is all that you can do with asset type choice lists:


- [Add or Edit Asset Type Choice Lists](#)
- [Delete Asset Type Choice Lists](#)

## Add or Edit Asset Type Choice Lists

To create an asset type choice list, you can select any asset type and repository you have access to. Keep in mind that the asset type you choose should be supported in Content Capture. Asset Type choice lists do not participate in dependent choice list configurations.

1. On the **Metadata** tab of your procedure, go to the **Asset Type Choice Lists** table, and click  to add an asset type choice list, or edit one by selecting it and clicking .
2. On the **Asset Choice List** page, enter a name in the **Choice List Name** field (for example, **Digital Asset Type**).




3. From the **Repository** drop-down list, select the repository from which content items that will make the choice list should be used.
4. From the **Asset Type** drop-down list, select the asset types created in Oracle Content Management.
5. From the **Item Value** drop-down list, select the asset type that is stored in the data value. This can be any field in the asset type that matches one of the field types that are supported in Content Capture. The asset type field selected as the item value determines the data type (numeric, alphanumeric, etc.) of the list, and thus only content capture fields of the same data type can reference that choice list.
6. (Optional) From the **Display Value** drop-down list, choose the value that will be displayed to the user for selection. This could be the same value as the item value. You can also leave it blank which implies it is the same as the item value.
7. (Optional) In **Select Date Format**, select from the available options.
8. (Optional) From the **Sort Order** drop-down list, choose **Ascending** or **Descending**.
9. Click  on the top-right side of the **Quick Preview** table to preview matching data. If there are more than five asset items, then the matching data for the first five items is displayed.
10. Click **Submit** to complete the configuration.  
The new choice list is displayed in the Asset Type Choice List table.

## Delete Asset Type Choice Lists

When you no longer want to use an asset type choice list, you can delete it so that it's not available for use in a client profile.

To delete an asset type choice list:

1. On the **Metadata** tab, select the choice list to delete in the **Dependent Choice Lists** table, and click .
2. When prompted, click **Yes** to confirm the deletion.

## Configure Dependent Choice Lists

In a choice list dependency, a parent field is linked to two or more child choice lists, one of which is displayed after the user makes a selection in the parent field.

You create a dependent choice list and its associated choice lists on the **Metadata** tab and then select the dependent choice list in a client profile, as described in [Add or Edit a Dependent Choice List](#). Before you start creating this type of choice list, take a look at [Important Points About Choice List Dependencies](#).

## Important Points About Choice List Dependencies

- You can create choice list dependencies between user defined choice lists.
- Create all choice lists you plan to link before creating a choice list dependency. At a minimum, you need a parent choice list, and two or more child choice lists.
- Each item in a child list can be related to multiple parent items. For example, *Supplies* could be a child item to *Household* and *Automotive* subproducts.

- You can create multi-level dependencies (for example, great grandparent, grandparent, parent, and child choice lists).
- Only one choice list dependency may be assigned to a client profile. Multiple parent/child dependencies must be defined within a single Dependent Choice List definition.

## Add or Edit a Dependent Choice List

To add or edit a dependent choice list:

1. On the **Metadata** tab, [create user defined choice lists](#).

You need at least three choice lists, including one to serve as parent and two or more to serve as child choice lists.

For example:

Parent or Child	Choice List Name	Choices
Parent	Products	<ul style="list-style-type: none"> <li>• Automotive</li> <li>• Household</li> </ul>
Child	Automotive Subproducts	<ul style="list-style-type: none"> <li>• Cars</li> <li>• Motorcycles</li> </ul>
Child	Household Subproducts	<ul style="list-style-type: none"> <li>• Bathroom</li> <li>• Kitchen</li> </ul>



2. On the **Metadata** tab, [create metadata fields](#) to contain the choice lists.

In our example, we created a **Products** field to serve as the parent field and a **Subproducts** field to serve as the child.

- a. On the Metadata Field page for the parent field, choose a **Choice List Source**.
  - b. In the **Choice List** field, select the choice list you created. In our example, we chose **Products** as the choice list.
  - c. On the Metadata Field page for the child field, choose the **Parent Choice List Field**. In our example, we chose **Products** as the parent metadata field.
  - d. To prevent users from typing in an entry instead of selecting a choice from the list, select the **Locked** check box and submit your changes.
3. On the **Classification** tab, [create a document profile](#) that uses the metadata fields you created in step 1.

In our example, we created a document profile called **Products** that contained the **Products** and **Subproducts** metadata fields.

4. On the **Metadata** tab, create the dependent choice list and click **Submit**.


- a. In the **Dependent Choice Lists** table, click  to create a dependent choice list. You can edit an existing dependent choice list by selecting it and clicking .
- b. On the Dependent Choice List page, enter a name for the dependency, such as **Product/subproduct dependency**.

- c. In the **Defined Dependent Choice Lists** table, add fields for the first dependent choice by identifying fields for a parent choice list item (**Household**) and the child list that displays when the user selects it (**Household Subproducts**):
    - **Parent Choice List Source:** Capture Source
    - **Parent Choice List:** Products
    - **Parent Choice List Item:** Household
    - **Child Choice List Source:** Capture Source
    - **Child Choice List:** Household Subproducts
  - d. Add fields for the second dependent choice, identifying another parent choice list item (**Automotive**) and the child list that displays when the user selects it (**Automotive Subproducts**).
5. On the **Capture** tab, [add or edit a client profile](#) that uses the document profile and choice list dependency you created.
    - a. On the General Settings page, select a profile of type **2 - Capture and Index** or **3 - Index Only** and then enter a name and batch prefix.
    - b. On the Document Indexing Settings page, select the dependency you created in the **Dependent Choice List** field and select the document profile you created in the **Document Profiles** field.
    - c. On the Security page, grant a user the login access to the client profile and save the client profile.
  6. Test the choice list dependency in the client.
    - a. In the client, select the client profile you created and capture a batch.
    - b. Expand the batch and select a document.
    - c. In the metadata pane, try out the choice list dependency.

## Delete Dependent Choice Lists

Deleting a choice list dependency means it is no longer available for use in a client profile. Its associated choice lists and metadata fields are not affected.






To delete a dependent choice list:

1. On the **Metadata** tab, select the dependency to delete in the Dependent Choice Lists table, and click .
2. When prompted, click **Yes** to confirm the deletion.

## Configure Asset Synchronizations

You can synchronize Oracle Content Management with another database where your content is maintained. This could be an on-premise or a cloud-based database. The file import agent synchronizes content for you based on the asset synchronizations you've configured.

To configure asset synchronizations:







1. On the **Metadata** tab of your procedure, go to the Asset Synchronizations table, and click  to create an asset synchronization, or edit one by selecting it and clicking . You can delete an asset synchronization by clicking .
2. On the Asset synchronization page, enter a name in the **Synchronization Name** field (for example, **Vendor Asset Synchronization**).
3. Select the **Online** check box to make this asset synchronization available during processing.  
You can activate or deactivate an asset synchronization by clicking **Online/Offline** on the Asset Synchronizations table of the **Metadata** tab.
4. In the **Frequency** field, enter the time duration honoring which the [file import agent](#) will synchronize content items.
5. In the **Source Database** section:
  - a. From the **Database** drop-down list, choose the database schema of the database in which content is maintained.
  - b. From the **Table** drop-down list, choose the database table that you want to use for synchronization.
6. In the **Target Type** section:
  - a. From the **Repository** drop-down list, choose the Oracle Content Management repository that should be synchronized with the database you chose in the previous step.
  - b. From the **Asset Type** drop-down list, select an asset type that should be synchronized.
7. Edit the **Asset Field** and **Data Source Value** field mappings as necessary. These fields show values from asset type and the database table that you selected in the previous steps. Asset fields shown in this section are defined in the Oracle Content Management repository. The columns in the data source value are of the table you selected in the **Source Database** section. To successfully complete the asset synchronization, you must map those asset fields that have asterisk (\*) next to them. These are the required asset fields. You also need to map all primary keys of the table.  
 Click  to open the Asset Field Mapping dialog and make the required changes. Only the relevant data source values are shown for the asset fields. You can select from these values as required.
8. In the **Restricted Asset Name Value Handling** section, choose the next action if the asset name is assigned a value containing invalid characters:
  - **Remove invalid characters:** Characters that are considered invalid in asset names are: ; " : ? < > % { } \ / \* |
  - **Skip record synchronization:** Logs the record details in the `capture.log` file of the file import agent.
9. Click **Submit** to complete the configuration.

## Configure Asset Lookups

You can leverage the asset type choice lists as a means of achieving asset lookups for content capture metadata. You can create, modify, and delete asset lookup configurations based on Oracle Content Management assets. A lookup definition provides for a single asset query based on a content capture metadata field and corresponding list of fields to be returned into content capture metadata fields.


A single lookup definition can be referenced by multiple other profiles that need its lookup combination. You can create multiple lookups and associate them with the client profile, allowing a desktop user to retrieve data in different ways. However, they may only include one lookup per search field. For example, they can have a lookup by Vendor Name and one by Purchase Order, but they cannot have two lookups that use the Vendor Name. This displays an extra asset field to the user, but no value is stored in a content capture metadata field.

To create an asset type lookup:

1. On the **Metadata** tab of your procedure, go to the **Asset Lookup** table, and click  to create an asset lookup, or edit one by selecting it and clicking . You can delete an asset lookup by clicking .
2. On the Asset Lookup page, enter a name in the **Asset Lookup Name** field (for example, Vendor Asset Lookup).
3. From the **Capture Search Field** drop-down list, select the content capture field whose value will be used to search for the asset. This field is from the content capture metadata.
4. From the **Repository** drop-down list, select the repository from which asset lookups to make the choice list should be used.
5. From the **Asset Type** drop-down list, select the asset type.
6. From the **Asset Search Field** drop-down list, select the field from that type will be searched against. This field is from the Oracle Content Management asset type definition.
7. If you want that the asset lookup should look for exact words the client user specifies, then select the **Perform exact match** check box. The **Perform exact match** check box is enabled if you select a string in **Asset Search Field**. However, it is disabled for a long string. The exact match is always performed if a date, number, or float data type is selected in **Asset Search Field**.
8. In the **Returned Value** table, define the field values that will be returned from the asset when a match is found. The fields are displayed in the same order they are defined in this table.
  - a. Click  to display the Asset Lookup Return Value dialog. You can edit an existing return value by clicking  and delete it by clicking .
  - b. Select a value from the **Capture Field** drop-down list. This value is from the content capture metadata.

 **Note:**

If you select a field of the Digital Asset Reference type, then the **Reference is to discovered Asset** check box is disabled to signify direct reference. If you select a field whose type is Content Item Reference, then this check box is available for selection. If you select this check box, the **Asset Field** is disabled.

- c. If you selected a capture field of a type other than the Digital Asset Reference type, then select a value from the **Asset Field** drop-down list. This value is from the Oracle Content Management asset type definition.
  - d. Click **OK** to complete the configuration.  
When a client user performs a lookup, the fields that you configured in the Asset Lookup Return Value dialog are displayed in the lookup result.
9. Click  on the top-right side of the **Quick Preview** table to preview matching data based on the value you selected in the **Asset Search Field** drop-down list. If there are more than ten assets, then the first ten assets are displayed.
  10. Click **Submit** to complete the configuration.  
The new asset lookup is displayed in the Asset Lookup table.

# 10

## Configure Classification

On the **Classification** tab, you define batch statuses that client users assign to their document batches. Some of the commonly used statuses are: Ready, Incomplete, Processed, and Approved. On this tab, you also define the attachment types of the documents that are supplementary to the primary documents. You also configure document profiles and associate with them the metadata fields of the documents that users process in the client environment.

Here is what you can do on the **Classification** tab:

- [Add, Edit, or Delete Batch Statuses](#)
- [Add, Edit, or Delete Attachment Types](#)
- [Configure Document Profiles](#)


### Add, Edit, or Delete Batch Statuses

The batch status feature enables you to assign statuses to batches. When you *add a status* to a procedure, the status can be assigned to batches in profiles and processor jobs. You can also *edit the status* any time after you've created it. Keep in mind that changes that you make to a batch status are applied throughout a procedure. If you *delete a batch status*, it is no longer available in client profiles, processors, and for users to assign to batches.

You can use batch statuses in these ways:

- In a client profile, you can assign a default status that gets assigned to batches when they are created. See [About Client Profiles](#).
- Client users can change a batch status, selecting from the available statuses, or search for batches based on their status.
- Some batch processors can change batch statuses after successful or failed processing.
- Batch status can be output as metadata upon commit.

To configure a batch status:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Classification** tab of your procedure.
3. In the **Batch Statuses** table, click .
4. In the **Add/Edit Status** dialog, enter a meaningful name for the status and click **OK**.  
The new status is displayed in the Batch Statuses table.


To delete a batch status, select it in the **Batch Statuses** table and click .

## Add, Edit, or Delete Attachment Types

An attachment is an image or non-image file associated with a primary document. You can create a list of possible attachment types. The client users can create and view attachments, change attachment types, and modify image attachments.

- You can assign attachment types to document profiles.  
If a document is assigned to the default document profile, then all the attachment types defined in the respective procedure are available for the document.
- When converting non-image attachments to image format using the TIFF conversion processor, you can restrict processing of attachments to specific attachment types. And, when merging documents, you can specify to include only source document's attachments that match the document profile's attachment types of the target document.
- When configuring hierarchical separator page definitions in a recognition processor job, you can define a separator page to indicate that the document is an attachment by setting the **Attachment Type** field.
- When configuring recognition processing, you can specify to include only attachments that match the document profile's attachment types.

### To configure attachment types:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Classification** tab of your procedure.
3. In the **Attachment Types** table, click .
4. On the **New Attachment Type** page, enter a meaningful name and optionally a description for the new attachment type.
5. If this attachment type is mandatory for document processing, select the **Required** check box.
6. Click **Submit**.  
The newly created attachment type is displayed in the **Attachment Types** table.  
To delete an attachment type, select it in the **Attachment Types** table and click



## Configure Document Profiles

A document profile includes a set of metadata fields that are used for indexing a specific type of document. For example, for a procedure configured for capturing Correspondence, Purchase Order, and Customer Agreement documents, you would likely create a document profile for each of these document types, and each would contain a different set of metadata fields. To enable users to scan batches that contain multiple document types, select each document profile in the client profile. This way users can choose the document profile that corresponds to the document and index it accordingly.



A document profile also specifies the set of attachment types that are available for documents classified to the document profile.



When specifying document profiles for use by a client profile, you can select one or more document profiles, all profiles, or the **Default** value. The default document profile contains all metadata fields and attachment types defined for the procedure, and it is useful for troubleshooting purposes.

Here are the main tasks associated with document profiles:

- [Add or Edit a Document Profile](#)
- [Delete a Document Profile](#)
- [Uses of Document Profiles](#)

## Add or Edit a Document Profile


To add or edit a document profile:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Classification** tab.
3. In the **Document Profiles** table, click  to create a profile. To edit a profile, select it first and then click .
4. On the Document Profile page, do the following and save your changes:
  - a. In the **Document Profile (Type) Name** section, enter a name and description.
  - b. In the **Fields to Appear in Capture Client for Indexing** section, under **Metadata Fields**, in the **Available Metadata Fields** box, select the fields you want to include in the profile and move them to the **Selected Metadata Fields** box. Order the metadata fields in the sequence suitable for indexing.
  - c. In the **Attachment Types Associated with Document Profile** section, under **Attachment types**, in the **Available Attachment Types** box, select the attachment types you want to include in the profile and move them to the **Selected Attachment Types** box. Sequence the attachment types in the order in which a user will read attachments.

## Delete a Document Profile

You can delete those document profiles that the client users would not use. When you delete a document profile, it doesn't display in the metadata pane of the Content Capture Client.

To delete a document profile:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Classification** tab.  
The Document Profiles table lists profiles defined for the procedure.
3. Select a profile you want to delete, then click  and confirm the deletion.

The deleted document profile is no longer available in the Document Profiles table.

## Uses of Document Profiles

After creating a document profile for each document type to be indexed, you can select them wherever metadata fields are assigned.

**Table 10-1 Document Profile Use in Content Capture Components**

<b>Content Capture Component</b>	<b>Function</b>
Client profile	Select one or more document profiles on the <b>Document Indexing Settings</b> page to allow users to select a document profile, complete its metadata fields, and modify an attachment type. See <a href="#">Configure Document Profiles in Client Profiles</a> .
Import processor	Select the document profile for indexing imported documents. See <a href="#">Configure Metadata Assignment During Import</a> .
Recognition processor	Select the document profile for indexing recognized documents. You can even dynamically determine the document profile. See <a href="#">Specify a Static or Dynamically Determined Document Profile</a> .
Commit profile	Restrict the documents that the commit profile processes by selecting one or more document profiles. When the commit profile runs, documents that are assigned the selected document profiles are committed. See <a href="#">Restrict a Commit Profile Based on Document Profile</a> .

# 11

## Configure Capture Settings

On the **Capture** tab, you configure client profiles to automate document capturing for client users. In client profiles, you associate all other settings you configure on other tabs of your procedure. You can create several client profiles in a procedure to meet varied business requirements of the client users. On this tab, you also configure how documents are imported and organized. And, how email attachments are used in the reorganized documents.

Here is what you can do on the **Capture** tab:

- [Configure Client Profiles](#)
- [Configure Import Processor Jobs](#)

## Configure Client Profiles

A client profile contains the settings that end-users choose while scanning, importing, and/or indexing documents in the Content Capture Client. Client profiles control such things as how documents are created and separated in batches, whether metadata fields are available, and what happens when users release batches. You build client profiles using procedure elements.

See these topics to understand what client profiles are and how you configure them:

- [About Client Profiles](#)
- [Add or Edit a Client Profile](#)
- [Configure a Client Profile's Type](#)
- [Filter the Batch List Displayed to Users](#)
- [Configure Image Capture and Storage](#)
- [Configure Blank Page Detection](#)
- [Configure Non-Image File Capture Settings](#)
- [Configure Document Creation](#)
- [Configure Separator Sheet Use](#)
- [Use a Dependent Choice List in a Client Profile](#)
- [Enable an Asset Lookup in a Client Profile](#)
- [Configure Document Profiles in Client Profiles](#)
- [Grant or Remove Security Access to Client Profiles](#)
- [Configure a Client Profile's Post-Processing](#)
- [Add, Edit, or Delete a Release Process](#)

## About Client Profiles

Some users only capture documents, some are responsible for generating indexes for document batches, and some do both. You configure client profiles according to these requirements. In client profiles, you specify batch prefixes, batch priority, criteria for filtering batches (priority, status, prefix, and so on). To restrict client profiles' use, you can assign them users so that only users with sufficient rights can access client profiles in the client environment. You also associate one or more document profiles with each client profile.

To configure a client profile, you identify settings on the profile's pages.

**Table 11-1 Client Profile Configuration**

Page	Main Configuration
<b>General Settings</b>	<p>Select key profile settings such as:</p> <ul style="list-style-type: none"> <li>Whether users use the client profile to capture (scan or import), capture and index documents, or index documents only (see <a href="#">Configure a Client Profile's Type</a>).</li> <li>The client profile name that displays to client users.</li> <li>How batches captured with this client profile are named.</li> <li>A default status for batches created using this profile.</li> <li>The Batch Control options such as <b>Status</b>, <b>Priority</b>, <b>Notes</b> allow the administrator to control the ability to change these values for the profile users.</li> </ul>
<b>Batch Filter Settings</b>	<p>Optionally filter the batch display. Specify which batches are visible to users in the batch pane list when this client profile is selected and how they are listed (see <a href="#">Filter the Batch List Displayed to Users</a>).</p>
<b>Image Settings</b>	<p>Specify image color and quality settings, detect blank pages, and handle imported non-image files. This tab is available only when the <b>Profile Type</b> field is set to <b>1 - Capture Only</b> or <b>2 - Capture and Index</b> on the <b>General Settings</b> page. For example, specify:</p> <ul style="list-style-type: none"> <li>How captured images with this client profile are formatted. See <a href="#">Configure Image Capture and Storage</a>.</li> <li>How blank pages are detected during capture. See <a href="#">Configure Blank Page Detection</a>.</li> <li>Whether and how non-image documents are imported. See <a href="#">Configure Non-Image File Capture Settings</a>.</li> </ul>
<b>Document Indexing Settings</b>	<p>Configure document separation, dependent choice list, and document profile options as needed. This tab is available only when the <b>Profile Type</b> field is set to <b>2 - Capture and Index</b> or <b>3 - Index Only</b> on the <b>General Settings</b> page. For example, specify:</p> <ul style="list-style-type: none"> <li>How documents are created within batches (<a href="#">Configure Document Creation</a>) and separated (<a href="#">Configure Separator Sheet Use</a>).</li> <li>How separator sheets are detected (<a href="#">Configure Separator Sheet Use</a>).</li> <li>Dependent choice list (see <a href="#">Use a Dependent Choice List in a Client Profile</a>).</li> <li>Asset lookups (see <a href="#">Enable an Asset Lookup in a Client Profile</a>)</li> <li>Which document profiles (sets of metadata fields and attachment types) are available for users to complete metadata fields and select attachment types for documents (see <a href="#">Configure Document Profiles in Client Profiles</a>).</li> </ul>

**Table 11-1 (Cont.) Client Profile Configuration**

Page	Main Configuration
<b>Security</b>	Grant or remove access to the client profile for client users, based on their previously assigned role (see <a href="#">Configure Procedure Security</a> ).
<b>Post-Processing</b>	Define the release processes available for users when releasing batches (see <a href="#">Configure a Client Profile's Post-Processing</a> ).
<b>Summary</b>	Review selected settings for the client profile.

## Add or Edit a Client Profile



You can add a new client profile or edit an existing one on the **Capture** tab.


- It is recommended that you do not make major changes to a client profile after users have begun capturing batches using the profile. Instead, you may want to change the client profile to an index-only profile, which will allow users to index and release existing batches but prevent them from capturing additional batches.

For more extensive changes to client profiles, make a copy of the production profile where you can make changes safely until the new profile is ready to be used in production.

- Periodically save the client profile when you are making changes to it. Run the client to view and test the profile changes. After editing a client profile, its metadata fields, or its document profiles, sign out and back in to the client to see procedure changes reflected in the client.

To add or edit a client profile:

- In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
- Open the **Capture** tab of your procedure.
- In the **Client Profiles** table, click  or select a profile and click .

To create another identical profile, you can copy an existing client profile by clicking  and modifying it as required.

- On the client profile, on each page, select applicable settings (see the table in [About Client Profiles](#)).
- Click **Submit** to save and close the profile.



## Deactivate or Delete a Client Profile

You can make a client profile accessible or inaccessible to the client users by activating or deactivating the profile. By default, client profiles are active (online). You can take a client profile offline for troubleshooting purposes or to phase out a profile before deleting it. Before you delete a profile, consider deactivating it for a period of time.

Deleting a client profile does not affect batches previously captured using the profile. Because users see all batches locked to them regardless of batch filter settings, they may be

able to choose another client profile and continue to view, edit, and release batches they created using the deleted client profile.

**To deactivate or delete a client profile:**

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Capture** tab.
3. In the **Client Profiles** table, select the profile you want to first deactivate and then delete.
4. Click  to deactivate the profile.  
You can activate or deactivate a client profile by clicking **Online/Offline** on the **Capture** tab.
5. Select the deactivated profile and click . When prompted, confirm that you want to delete this profile.

## Configure a Client Profile's Type

The client profile type you select determines how users use the profile and whether they capture documents and complete metadata values. The profile type also affects how documents are created within batches.

To configure a client profile type:

1. [Add or edit a client profile](#) and select the **General Settings** page.
2. In the **Profile Type** field, choose one of the following profile types: [Capture Only](#), [Capture and Index](#), or [Index Only](#).
3. Click **Submit** to save the client profile.

## Capture Only

Choose the **1 - Capture Only** profile type when you want users to scan or import documents but not index them. This type is commonly used for batches that are indexed later by the recognition processor in a post-processing step. When users select a Capture Only profile, the metadata pane does not display in the client window.

- When users *scan a batch*, the client scans all papers loaded in the scanner and creates a single document. Client users can separate the single document into multiple documents using the **Create New Document** option. Or a batch processor such as recognition processor can perform document separation.
- When users *import a batch*, the import option they select determines whether a single document or multiple documents are created.
- Although client users cannot index documents, they can separate documents by using the **Create New Document** option.
- With a Capture Only profile, indexing and document creation options do not apply. Settings on the **Document Indexing Settings** page are not available.

## Capture and Index

Choose the **2 - Capture and Index** profile type when you want users to capture documents and index them. When users select a profile, the metadata pane displays in the client window at the time of opening a batch.

- When users *scan a batch* using a Capture and Index profile, the **Document Creation Option** selected on the **Document Indexing Settings** page determines how documents are created, as described in [Configure Document Creation](#). For example, a document creation option of **One Page (Simplex)** creates a new document after each page is captured. Users can use the **Create New Document** option to separate documents, or they use blank page separator sheets to automatically separate and define documents in the batch.
- When users *import a batch* using a Capture and Index profile, the import option they select determines whether a single document or multiple documents are created. Users can use the **Create New Document** option to separate documents in the batch.

## Index Only

Choose the **3 - Index Only** profile type when you want users to index documents from previously captured batches. For example, batches created using a high-speed, production scanner can be processed by multiple indexing users using the client. When users select an Index Only profile, the metadata pane displays in the client window, but capture options in the batch pane are hidden, preventing them from scanning or importing to add pages to batches.

You might create an Index Only profile when:

- Different groups of users scan versus index batches
- Indexing users complete or verify indexing
- Batches need correction but the indexing users do not have scanner access

## Filter the Batch List Displayed to Users

You have a range of options for defining the batches users can see and access in the client's batch pane list. For example, you might configure the client profile to allow users to view any batch in the procedure, or restrict the batch list to batches users captured on their own workstations that have a certain prefix and contain errors.

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

- Batches locked to a user are *always* listed. Although not all may be visible if the user has set a limit on the maximum number to display in the client preferences.
- Whether users see batches that are unlocked or locked to other users depends on batch filter settings in the client profile. For example, you can limit the batch list to batches with a certain prefix, in a certain state (such as error or processing), or with a selected status or priority.
- Users can further filter the batch list in the client using search options. For example, they might filter the batch list to display a limited set of batches, such as high priority batches or older batches only or search for batches containing one or more documents that encountered an error.

**To display batches to users in the client window:**

1. [Add or edit a client profile](#) and select the **Batch Filter Settings** page.
2. In the page settings, specify filter settings that restrict the list of batches that display and save your changes. Follow these guidelines and filter descriptions listed in the table given below.
  - **AND conditions apply between filters.** In this case, users see only batches that meet all selected filters (AND condition). If you specify a batch status and batch priority, only batches with that batch status and priority are displayed.
  - **OR conditions apply within a filter.** In this case, users see batches that meet any of the selected filters (OR condition). If you select 1, 2, and 3 in the **Priorities** field, batches with an assigned priority of 1, 2, or 3 are displayed.

**Table 11-2 Batch Filtering**

Filter	Example Use
Additional Batch Prefixes	<p>Users always see batches created with the selected profile's batch prefix, subject to other filters.</p> <ul style="list-style-type: none"> <li>• To see batches that match the profile's batch prefix, re-enter the batch prefix here.</li> <li>• To also see batches with other prefixes in addition to the profile's own prefix, list them here to include the profile's prefix. Enter a ; (semi-colon) to separate prefixes.</li> <li>• Leave this field blank, so that users see batches created by any profile in that procedure, regardless of prefix.</li> </ul>
Processing States	<p>Restrict display to batches with one or more selected processing states. Processing states are internal system states that cannot be redefined.</p> <ul style="list-style-type: none"> <li>• Use the <b>Ready</b> state to display batches that are unlocked and ready for users to select and work on. For example, use this state to display unlocked Index Only type batches to indexing users.</li> <li>• Use the <b>Locked</b> state to display batches locked to any user.</li> <li>• Use the <b>Error</b> state to display batches with one or more documents that encountered an error. For example, use this state to display batches needing correction by qualified users.</li> <li>• Use the <b>Processing</b> state to display batches currently undergoing processing by one of the batch processors.</li> </ul>
Batch Statuses	<p>Restrict display to batches with one or more batch statuses created on the <b>Classification</b> tab. For example, select a <i>Rescan</i> or <i>Needs Review</i> batch status to display batches needing attention to qualified users.</p>
Priorities	<p>Restrict display to batches with one or more priorities. For example, select priority 10 to display batches needing immediate attention to users.</p>
Batch Visibility	<p>Restrict display by user and location.</p> <ul style="list-style-type: none"> <li>• Select <b>User and Workstation</b> to display only batches that the current user captured on his or her current workstation. For example, you might select this setting in the case of business users who should not open other users' batches.</li> <li>• Select <b>User</b> to display batches that the current user captured on one or more workstations. For example, in a common scenario where every user is responsible for scanning and indexing, all users go to one scan workstation to log in and scan their batches, and then they go to their own workstation to index them.</li> <li>• Select <b>All Users</b> (default) to display batches to users, regardless of the workstation on which they were captured or by whom.</li> </ul>



**Table 11-2 (Cont.) Batch Filtering**

Filter	Example Use
Days Old	Enter numbers in the <b>From</b> and <b>To</b> fields to display batches that are between the specified number of days old. For example, you might display batches that are between 7 and 45 days old.
Primary Sort, Secondary Sort	<p>Specify how batches should be sorted, and select ascending or descending order. You can specify a primary and secondary sort by:</p> <ul style="list-style-type: none"> <li>• <b>Batch Name</b></li> <li>• <b>Batch Item Count</b></li> <li>• <b>Batch Date</b></li> <li>• <b>Batch Priority</b></li> <li>• <b>Batch Status</b></li> </ul> <p>For example, sort batches so that those with the highest priority display at the top and those with the same priority display with the oldest date first.</p>

 **Note:**

This setting specifies the default sort order for the client profile and the user can change the sort order after the batches are displayed.

## Configure Image Capture and Storage

When users capture documents in the Content Capture Client, the image settings come from two sources:

- *Client profile settings*, which are described in this topic. These settings apply to all batches captured with the client profile. In some cases, users can override these settings.
- *Scanner settings*, which are specific to the selected scanner and selected by users. The user selects these settings after clicking **Capture Settings** in the batch pane. Once selected, these settings are saved with the client profile.

### To configure image and non-image capture settings in a client profile:

1. [Add or edit a client profile](#) and select the **Image Settings** page.
2. Configure image settings.
  - a. In the **Default Color** field, specify a default color (**Black and White**, **Grayscale**, or **Color**), balancing image quality with image size considerations.

If you leave the field set to **<Not Specified>**, the scanner's selected color (selected by the client user or the scanner's default setting) is used.

Select the **Prevent Default Override** field to prevent client users from changing the scanner's color settings. Not all scanners may honor this setting.
  - b. In the **Default DPI** field, specify a default DPI (**100**, **150**, **200**, **240**, **300**, **400**, or **600**), balancing image quality with image size considerations.

If you leave the field set to **<Not Specified>**, the scanner's selected DPI (selected by the client user or the scanner's default setting) is used.

Select the **Prevent Default Override** field to prevent users from changing image resolution in scanner settings in the client. Not all scanners may honor this setting.

- c. In the **Blank Page Byte Threshold** field, optionally [configure blank page detection](#).
- d. To specify default image brightness and contrast, select the **Apply Default Brightness and Contrast** field and move the sliders to adjust the values up or down. Client users may be able to override these settings if allowed in their scanner-specific settings window.

 **Note:**

Image results can vary among different scanner models. So, applying a default brightness and contrast works best when the same scanner model is being used with the client profile.

3. [Configure non-image settings](#).
4. Click **Submit** to save the client profile.

## Configure Blank Page Detection

Image documents that users capture may contain blank pages. You can configure Content Capture to automatically delete blank pages from batches. To do this, you need to identify how a blank page should be detected, that is, you need to specify a threshold file size so any image whose size is less than or equal to this threshold is considered a blank page, and therefore, deleted.

For information about the differences in configuring separator sheet and blank page detection, see [Configure Separator Sheet Use](#).

### To configure blank page detection:

1. When you [add or edit a client profile](#), select the **Image Settings** page.
2. In the **Blank Page Byte Threshold** field, enter a file size value (in bytes). Users can override this threshold setting in the client's Preferences window by entering a number in the **Minimum number of bytes scanned before deleting a page** field.

For black and white (200 x 200 DPI images), the recommended value is 1500. At this setting, Content Capture can usually differentiate between a blank page and a page with a small amount of text.

3. Click **Submit** to save the client profile.

## Configure Non-Image File Capture Settings

Scanned paper documents or imported image files are converted into image documents in Content Capture. However, when users import *non-image files* such as Microsoft Word or PDF documents, non-image file settings in the client profile determine how they are handled.

To configure non-image file handling in a client profile:

1. [Add or edit a client profile](#) and select the **Image Settings** page.

- In the **Non-Image File Import Action** field, select the action to occur when a user selects a non-image file to import.
  - Do Not Import:** When selected, a message displays to the user that non-image files cannot be imported and no batch is created.
  - Import in Native Format:** When selected, non-image files are captured in their original format. Users can index non-image documents, but cannot edit their individual pages.
  - Convert to Image Format:** When selected, non-image files are converted to images using the non-image conversion settings selected on this page.
- If needed, specify a maximum number of pages to display to client users in the **Non-Image File Preview Page Limit** field.

This setting is useful for maximizing client performance. It applies only to non-image documents stored in their native format. The default is 25 pages. Specify 0 to skip specifying a maximum number of pages to preview.
- If needed, complete the **Non-Image Conversion** field settings.

These settings are available when **Convert to Image Format** is selected in step 2. They let you specify the color, JPEG image quality and DPI resolution to use for images during file conversion.
- Click **Submit** to save the client profile.

## Configure Document Creation

When you configure a client profile, make sure you specify how documents within batches are created. For instance, are documents captured with a fixed number of pages such as one-sided or two-sided documents? Are separator sheets to be used to indicate the end of one document and start of the next? Or will the user be prompted to specify how to create documents based on the batch contents?

To set a document creation option in a client profile:

- [Add or edit a client profile](#) and select the **Document Indexing Settings** page.

 **Note:**

Document creation options do not apply to capture-only profiles. See [Capture Only](#).

- In the **Document Creation Option** field, select one of these options and save your changes:
  - One Page (Simplex):** This option creates one-page documents, and it 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.

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.
  - 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 each document.

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.

- **Variable Number of Pages:** This option creates documents with a variable number of pages.
  - If users insert separator sheets between documents and the profile is configured to use separator sheets, the client scans all pages into the same document until it detects a separator sheet, in which case it starts a new document, scans all pages until the next separator sheet, and so on. The Content Capture Client discards the separator sheet pages, and places all the documents in a single batch. In the **Separator Sheet Byte Threshold** field, you configure how separator sheets are detected, as described in [Configure Separator Sheet Use](#).
  - If users *do not* insert 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.
- **Prompt User:** This option prompts users with the Document Creation Options dialog each time they begin scanning, asking them how to create documents within the batch. Users can choose a fixed number of pages (one page or two pages) or a variable number of pages.

## Configure Separator Sheet Use

You can configure a client profile to use separator pages to determine when documents should be separated. For images whose file size is less than or equal to the byte threshold value you specify, new documents are created and the separator sheet is deleted.

To configure a client profile to detect separator sheets:

1. [Add or edit a client profile](#) and select the **Document Indexing Settings** page.

To detect separator sheets, set the **Profile Type** field to **2 - Capture and Index** and set the **Document Creation Option** field to either **Variable Number of Pages** or **Prompt User**. If other settings are selected in these fields, the **Separator Sheet Byte Threshold** field setting has no effect.

In addition, if you select **Prompt User** in the **Document Creation Option** field, client users can override the separator sheet threshold you specify in this separator sheet field.
2. In the page settings, specify a value in the **Separator Sheet Byte Threshold** field.

For black and white (200 x 200 DPI images), the recommended byte value is 1500. At this setting, a blank separator page and a page with a small amount of text are usually differentiated.

The **Blank Page Byte Threshold** field also sets the threshold at which blank pages are detected. In that case, however, the detected blank pages are deleted, so they are not treated as separator sheets.

 **Note:**

If both fields contain a value other than 0, only the **Separator Sheet Byte Threshold** field is used. The **Blank Page Byte Threshold** field is ignored. For information about deleting blank pages, see [Configure Blank Page Detection](#).

3. Click **Submit** to save the client profile.

## Use a Dependent Choice List in a Client Profile

A dependent choice list includes two or more child choice lists linked to a parent field. One of which is displayed after the user makes a selection in the parent field. You can apply multiple choice lists but only one dependent choice list definition to a client profile through metadata field definitions.

To use a dependent choice list in a client profile:


1. On the **Metadata** tab, [create two or more choice lists](#), then create a [dependent choice list](#) that links them.
2. On the **Capture** tab, [add or edit a client profile](#).
3. In the **Dependent Choice List** field on the **Document Indexing Settings** page, select the dependent choice list you created in step 1.
4. Click **Submit** to save the client profile.

In the client, test the dependent choice list as a user would use it.

## Enable an Asset Lookup in a Client Profile

To be able to enable an asset lookup in a client profile, you must first [create an asset lookup](#) on the Metadata tab.

To enable asset lookup in a client profile:

1. On the **Capture** tab, [add or edit a client profile](#).
2. On the **Document Indexing Settings** page, go to the **Asset Lookup** table, and click .
3. In the **Enable Asset Lookup** dialog, from the **Asset Lookup** drop-down list, select a lookup you created on the **Metadata** tab.
4. In the **Asset Returned Limit** box, enter a number to specify the number of assets to be returned during lookup. The default value is 10.
5. Select the **Always Display Assets** check box, if required.
6. Click **OK** to complete the configuration.

In the Content Capture Client, test the asset lookup as a user would use it.

## Configure Document Profiles in Client Profiles

A document profile specifies the set of metadata fields you can use to index a specific type of document and the set of attachment types available for a document. When you are

configuring a client profile, select document profiles for all types of documents to be indexed or both captured and indexed with the profile.

See [Add or Edit a Document Profile](#).

To configure document profiles in a client profile:

1. [Add or edit a client profile](#) and select the **Document Indexing Settings** page.  
To access this page, you must select indexing options **2 - Capture and Index** or **3 - Index Only** in the **Profile Type** field on the General Settings page.
2. In the page settings, complete the **Document Profiles** field.
  - Select one or more document profiles listed.
  - Select **All** to make all defined document profiles available for user selection.
  - Select **Default** to make all metadata fields and attachment types defined for the procedure available in a single profile. This option is useful for troubleshooting purposes.
3. Click **Submit** to save the client profile.

## Grant or Remove Security Access to Client Profiles


Content Capture provides these layers of client security:


- The system administrator must assign the appropriate user role (`CECCaptureClient`) to enable the user to sign in to the Content Capture Client.
- Procedure managers may be granted *procedure manager* and *user* roles, allowing them access to the Procedures page for configuration and the Content Capture Client for testing configuration.
- To see and access specific client profiles, the procedure managers assign users the security access to the profiles.

**To grant content capture users the security access to a client profile:**

1. [Add or edit a client profile](#) and select the **Security** page.

The Client Profile Users table lists users and groups with access to the client

profile. You can remove a user group by selecting it and clicking . When you remove access to a client profile from a user or group, the profile no longer displays in the **Client Profile** field of the Content Capture Client for capturing new batches. However, users may still be able to access batches captured with the profile with another client profile selected.

2. To add a client profile user, click  in the **Client Profile Users** table.
3. In the **Add Security Member** dialog, search for and add one or more users or groups. Use the text field to search for a specific member name. You can use the '\*' character as a wildcard within a group name or user name.
4. Add the security member you selected and then click **Submit** to save the client profile.

Log in to the client as the user you just added. If the client profile is online, it should now display in the **Client Profile** field.

## Configure a Client Profile's Post-Processing




Client users either unlock their batches or release them through a release process after they have worked on the batches. The next step of the batch depends on its post-processing configuration you specify using a release process. Either the batch undergoes commit processing based on active commit profiles defined for the procedure. Or, it is placed in a queue for further processing such as [batch flow to conversion job to TIFF](#), [batch flow to conversion job to PDF](#), [batch flow to a recognition processor job](#), [batch flow to an asset lookup job](#), or [batch flow to an XML transformation job](#).

To configure post-processing for a client profile:

1. [Add or edit a client profile](#) and then select the **Post-Processing** page.
2. In the **Available Release Processes** table, [add or edit a release process](#).
3. Click **Submit** to save the client profile.

## Add, Edit, or Delete a Release Process

To add, edit, or delete a release process:

1. [Add or edit a client profile](#) and then select the **Post-Processing** page.
2. In the **Available Release Processes** table, click  to add a release process. You can also edit or delete a release process by selecting it in the table and clicking  or .
3. In the **Release Process Settings** dialog, do the following and then click **OK**:
  - a. Enter a name and description for the release process. The name will appear within the Content Capture Client as a selected release process.
  - b. In the **Batch Processor** field, specify what the next step will be once users release the batches captured with this client profile. You can choose:
    - **Commit Processor**: Select to send batches to this processor for final committing (output). For example, you might select this step after users capture and fully index batches.
    - **Recognition Processor**: Select to send batches to this processor for bar code recognition. For example, you might send batches scanned but not indexed for automatic indexing via bar code recognition.
    - **Conversions to TIFF**: Select to send batches to this processor for converting non-image documents that users import to image format.
    - **Conversions to PDF**: Select to send batches to this processor for converting documents to PDFs.
    - **Asset Lookup Processor**: Select to send batches to this processor to enable asset lookups.
    - **XML Transformation Processor**: Select to send batches to this processor to enable XML transformation of XML documents.
    - **Taxonomy Lookup Processor**: Select to provide taxonomy categories or automate taxonomy searches using a capture field value.

- **Conditional Assignment Processor:** Select to provide a basic conditional logic that gives you the flexibility to manipulate metadata field values and change document profiles.
  - **External Processor:** Select to integrate existing, or new, capabilities with Content Capture. These capabilities can include types of document conversions, perhaps to Microsoft PowerPoint or other image formats. Or, the external processor could assign metadata values based on document content or sender's email address. In general, it's a means to extend the functionality of Content Capture as a document flows through a procedure.
  - **OCR Processor:** Select to convert image documents into PDF or text.
- c. If you specified conversions to TIFF/PDF or recognition processing as the next step, select the conversion or recognition job to run in the **Batch Processor Job** field.
  - d. Optionally, select the **Default** field to specify this release process as the default release process for the client profile.

## Configure Import Processor Jobs

With the import processor feature, you can automate bulk importing of documents from email, network folders, or list files into a capture procedure.

To learn about import processing and how you can configure it to automate bulk importing of documents, see:

- [About Import Processing](#)
- [Add or Edit an Import Processor Job](#)
- [Deactivate or Delete an Import Processor Job](#)
- [Configure Blank Page Detection in an Import Processor Job](#)
- [Configure Email Message and Email Attachment Importing](#)
- [Set Up Google Mail \(OAuth\) for Email Import](#)
- [Configure List File Importing](#)
- [Import Attachments During List File Importing](#)
- [Configure File Importing from a Folder](#)
- [Configure Metadata Assignment During Import](#)
- [Configure Post-Processing of an Import Processor Job](#)

## About Import Processing

The import processor lets you automate bulk importing of documents (image and non-image) into Oracle Content Management from email, network folders, or list files.

### Key Import Processor Job Settings

You can apply the import processor's automated import of images and other electronic documents into Content Capture to such applications as multifunctional devices, images scanned using third-party software, and documents sent as email attachments.

Depending on the files you want to import, you can create these import processor jobs:



- **Email Source:** For an email source processor job, import processor imports files attached to incoming email messages into Content Capture. It can also import the email body and the entire email message.
- **Folder Source:** For a folder source processor job, import processor monitors an import folder and imports all files it finds with a specified file mask.
- **List File Source:** Import processor monitors an import folder and reads a list (text) file containing records that identify each file to import, zero or more attachment files to import, and optionally, metadata values to be assigned to the file.



### Important Points About Import Processing


- Unlike the other batch processors that process batches that are queued, the import processor polls at a specified frequency (ranging from every 30 seconds to once a day), in which it searches the specified source for files to import, and if found, begins processing them.
- You configure settings specific to the selected source (email or folder) on the **Import Source Settings** page: For example,
  - For an email source, you can specify email accounts you want to be monitored and email messages and/or attachments you want to import.
  - For a list file job, you can identify the folder and list files you want to be read.
  - For a folder import job, you can identify the folder and file types you want to import.

## Add or Edit an Import Processor Job

- Do not make major changes to the procedure elements of an import processor job while it is online. For example, if you modify or remove metadata fields used by the job, errors will occur because the data in the batch no longer matches the job's settings.
- When you edit processor job settings, run the client to view imported batches. In the client, you must refresh the batch list to see newly imported batches.

### To add or edit an import processor job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Capture** tab of your procedure.
3. In the **Import Processor Jobs** table, click  to create a new job. To edit an existing job, select it and click .

You can also copy an import processor job by selecting it, clicking , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

4. Select settings on the General Settings page.
  - a. Enter a name in the **Import Job Name** field and a prefix in the **Batch Prefix** field. Imported batches are named using this prefix, followed by a number that increments with each new batch.
  - b. In the **Import Source** field, specify a source for imported files: **Email Source**, **Folder Source**, or **List File Source**.

The source you select determines the settings shown on the Import Source Settings page.

For This Import Source Type	See
Email Source	<ul style="list-style-type: none"> <li>• <a href="#">Configure Email Message and Email Attachment Importing</a></li> <li>• <a href="#">Set Up Google Mail (OAuth) for Email Import</a></li> </ul>
Folder Source	<a href="#">Configure File Importing from a Folder</a>
List Source	<ul style="list-style-type: none"> <li>• <a href="#">Configure List File Importing</a></li> <li>• <a href="#">Import Attachments During List File Importing</a></li> </ul>

- c. For **Folder Source** or **List File Source**, in the **Import Frequency** field, specify the time interval at which the import processor job checks for files to import. You can choose every 30 seconds, every 1, 5, 15, or 30 minutes, every 1 hour, or every day. If you specify every day, specify a time in the **Time Hr** and **Min** fields that display.
  - d. Complete other settings on the page, such as specifying a default batch status or priority to assign to batches when they are created.
5. On the Image Settings page, complete settings relating to how imported image files are formatted and validated.
    - a. Select the **Preserve Image Files** option to preserve image files and allow the import processor to import images without performing any image processing. Selecting this option automatically disables all the other options on this page. You won't be able to edit preserved image file documents (for example, append pages, delete pages, or move pages).
    - b. In the **Image Down-Sample** field, specify how to convert images, by retaining their image format (**None**), converting color to grayscale (**Down-sample color to 8 bit grayscale**), or converting either to black and white (**Down-sample color or grayscale to black and white**).

Some of the common raster image file formats for which down sampling will be applied are:

- JPG (.jpg, .jpeg)
  - PNG (.png)
  - TIFF (.tiff, .tif)
  - RAW (.cr2)
  - BMP (.bmp)
- c. In the **JPEG Image Quality** field, specify a value between 0 and 99, where 99 is the highest quality and 85 is the default setting. This field does not apply to black and white images.
  - d. In the **If Image Validation Fails** field, specify an action if an image page fails decompression validation:
    - **Fail the batch:** The entire batch goes in to the error state, and it is sent to the Content Capture Client.
    - **Isolate the file:** Creates a new batch that contains only the failed document. Other documents that didn't fail are processed successfully.

- **Delete the batch:** This option is available if you've chosen **Email Source** as the import source on the General Settings page.
  - **Skip the file:** This option is available if you've chosen **Email Source** as the import source on the General Settings page.
- e. In the **Blank Page Byte Threshold for black and white** and the **Blank Page Byte Threshold for color or grayscale** fields, enter a file size value (in bytes). Any image whose size is less than or equal to the threshold is considered a blank page and therefore deleted.

 **Note:**

For black and white (200 x 200 DPI images), the recommended value is 1500. At this setting, a blank page and a page with a small amount of text are usually differentiated.

6. On the Document Profile page, configure settings related to assigning metadata to imported documents. See [Configure Metadata Assignment During Import](#).
7. On the Import Source Settings page, configure source-specific settings.
  - For an email source job, see [Configure Email Message and Email Attachment Importing](#).
  - For a folder source job, see [Configure File Importing from a Folder](#).
8. On the Post-Processing page, specify what happens after import processing completes. See [Configure Post-Processing of an Import Processor Job](#).
9. Review settings on the Import Job Summary page and click **Submit**.

You can now test the import processor job you created and set the frequency to every 30 seconds and monitor the folder or email account to view processing activity.

## Deactivate or Delete an Import Processor Job


When you delete an import job, the import processor no longer monitors for files at the specified frequency. If import jobs are online, they run at the interval specified in the **Import Frequency** field on the General Settings page of the job. You can temporarily stop the job from running (take it offline) or change a deactivated job to run again.

To deactivate or delete an import processor job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Capture** tab.
3. In the **Import Processor Jobs** table, select the job you want to first deactivate and click



You can also deactivate or activate an import processor job by deselecting or selecting the **Online** field on the General Settings page.

4. Select the deactivated job and click .
5. When prompted, click **Yes** to confirm that you want to delete this import processor job.

## Configure Blank Page Detection in an Import Processor Job

Often users import image documents that contain blank pages. You can configure Content Capture to automatically detect and delete blank pages from documents. All you need to do is, specify a threshold file size so any image whose size is less than or equal to this threshold size is considered a blank page.

To configure blank page detection:

1. [Add or edit an import processor job](#) and then select the **Image Settings** page.
2. In the **Blank Page Byte Threshold for black and white** and the **Blank Page Byte Threshold for color or grayscale** fields, enter a file size value (in bytes). These fields are applicable only for imported image files and not for non-image files. If blank images should be preserved, select the **Preserve image files** option instead.
3. Click **Submit** to save the import processor job.

You can verify the result of this configuration in the client. Blank images will be post-processed as valid images.

## Configure Email Message and Email Attachment Importing

The import processor imports files attached to incoming email messages along with email message elements such as subject and body text, into Content Capture. Each imported email message becomes a batch, with email elements such as attachments, message body, or entire email message created as separate documents within the batch.

See also: [Capture Files from a Monitored Email Account](#)

To configure email import processor job settings:


1. To [add, edit, or copy an import processor job](#), select **Email Source** in the **Import Source** field on the General Settings page.
2. To configure email import, select the **Import Source Settings** page.
3. On the **Email Accounts** tab, configure the email server the import processor job should connect to.


 **Note:**

- If you update the email account's password or switch the type of security authentication, or if the administrator changes the authentication type, then you must reconfigure or re-validate your email import job.
- If multi-factor authentication is enabled in your import job, then you must use the Microsoft exchange web service type: OAuth: Authorization code flow plus Exchange Online Keys.
- Basic Authentication in Exchange Online is being deprecated for IMAP and EWS protocols. For more information, see [Deprecation of Basic authentication in Exchange Online](#). We recommend switching to OAuth authentication at the earliest.

Connection Protocol	Available Options	Value
<b>Standard IMAP email server</b>	<b>Standard IMAP email server</b>	Enter a DNS name or IP address. For example, <code>emailserver.example.com</code> . This email server must support TLS 1.2 or higher and accept connections via port 993.
<b>Microsoft Exchange Web Services</b>	<b>Exchange Service Type: Basic Authentication. Email account credentials only.</b>	Enter the Microsoft exchange web service URL in the following format: <code>https://&lt;hostname&gt;/ews/exchange.asmx</code> . For example, <code>https://outlook.office365.com/ews/exchange.asmx</code> .

Connection Protocol	Available Options	Value
Microsoft Exchange Web Services	Exchange Service Type: OAuth. Email account credentials plus Exchange Online keys	<ul style="list-style-type: none"> <li>• <b>Microsoft Email Exchange Service URL</b> field: Enter the exchange web service URL to use in the following format:            https://&lt;hostname&gt;/ews/exchange.asmx. For example, https://outlook.office365.com/ews/exchange.asmx.</li> <li>• <b>App Client ID, App Client Secret, and App Tenant ID:</b> To get the values for the client ID, client secret, and tenant ID, register a new application using the Azure portal. When you register the application, add <b>EWS.AccessAsUser.All</b> API permission of <b>Office 365 Exchange Online</b> under <b>Configuration permissions</b> on the <b>API permissions</b> page under <b>Manage</b>. For details, see <a href="#">Register an application with the Microsoft identity platform</a>.</li> <li>• <b>EWS.AccessAsUser.All</b> in the <b>App Scope:</b> Enter the required values.</li> <li>• Add user accounts and configure other job settings.</li> </ul>

Connection Protocol	Available Options	Value
Microsoft Exchange Web Services	<p><b>Exchange Service Type: OAuth: Authorization code flow plus Exchange Online Keys.</b></p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p> <b>Note:</b></p> <p>This option is compatible with multi-factor authentication.</p> </div>	<ul style="list-style-type: none"> <li>• <b>Microsoft Email Exchange Service URL</b> field: Enter the exchange web service URL to use in the following format:  <code>https://&lt;hostname&gt;/ews/exchange.asmx</code>. For example, <code>https://outlook.office365.com/ews/exchange.asmx</code>.</li> <li>• <b>App Client ID, App Client Secret, and App Tenant ID:</b> To get the values for the client ID, client secret, and tenant ID, register a new application using the Azure portal. When you register the application, add these permissions under <b>Configuration permissions</b> on the <b>API permissions</b> page under <b>Manage</b>: <ul style="list-style-type: none"> <li>– <b>User.Read</b> API permission of <b>Microsoft Graph</b></li> <li>– <b>EWS.AccessAsUser.All</b> API permission of <b>Office 365 Exchange Online</b></li> </ul>                     For details, see <a href="#">Register an application with the Microsoft identity platform</a>.                 </li> <li>• Add user accounts and configure other job settings.</li> </ul>

Connection Protocol	Available Options	Value
Microsoft Graph API	Exchange Service Type: OAuth. Email account credentials plus Exchange Online keys	<ul style="list-style-type: none"> <li>• <b>App Client ID, App Client Secret, and App Tenant ID:</b> To get the values for the client ID, client secret, and tenant ID, register a new application using the Azure portal. When you register the application, add <b>mail.readwrite</b> API permission of <b>Office 365 Exchange Online</b> under <b>Configuration permissions</b> on the <b>API permissions</b> page under <b>Manage</b>. For details, see <a href="#">Register an application with the Microsoft identity platform</a>.</li> <li>• <b>user.read</b> and <b>mail.readwrite</b> in the <b>App Scope:</b> Enter the required values.</li> <li>• Add user accounts and configure other job settings.</li> </ul>
Microsoft Graph API	Exchange Service Type: OAuth: Authorization code flow plus Exchange Online Keys. <div data-bbox="771 1108 1107 1339" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 10px; margin-top: 10px;"> <p> <b>Note:</b> This option is compatible with multi-factor authentication.</p> </div>	<ul style="list-style-type: none"> <li>• <b>App Client ID, App Client Secret, and App Tenant ID:</b> To get the values for the client ID, client secret, and tenant ID, register a new application using the Azure portal. When you register the application, add these permissions under <b>Configuration permissions</b> on the <b>API permissions</b> page under <b>Manage</b>:               <ul style="list-style-type: none"> <li>– <b>Mail.Read</b> API permission of <b>Microsoft Graph</b></li> <li>– <b>mail.readwrite</b> API permission of <b>Office 365 Exchange Online</b></li> </ul>               For details, see <a href="#">Register an application with the Microsoft identity platform</a>.             </li> <li>• Add user accounts and configure other job settings.</li> </ul>
Google Mail (OAuth)	Google Mail (OAuth)	See <a href="#">Set Up Google Mail (OAuth) for Email Import</a>

4. Configure the email accounts that the job should check for messages:

- a. In the **Email Accounts to Process** table, click .






- d. In the **Exclude attachments matching these mask(s)** field, specify attachment files to exclude based on their file masks. You can enter multiple file masks separated by a comma or semi-colon.
- e. Optionally, select **Always post-process when attachments do not match mask(s)** to always post-process emails when attachments do not match mask(s) specified in fields, **Include attachments matching these mask(s)** and **Exclude attachments matching these mask(s)**. If this field is enabled and the attachments do not match the mask(s) specified, then the email import is considered unsuccessful and post-processed according to the settings you specify under the **Upon Failed Import** field in the **Post-Processing** tab.

 **Note:**

The **Always post-process when attachments do not match mask(s)** field is disabled when both **Import message body file** and **Include when no attachments exist** fields are enabled together.

- f. Under **Document Ordering**, specify the order in which the elements (for example, message body and attachments) from an email message are to be ordered as documents in imported batches.
  - g. Under **Include in Batch Note**, select message elements (such as **Received Date/Time**, **From Address**, **To Address**, **Subject**, and **Message Body**).
  - h. Under **Batch Priority**, optionally assign a priority to each new batch based on its email priority (low, normal, or high). For example, enter 8 in the **High** field to assign high priority emails a batch priority of 8 in Content Capture. Emails not assigned a priority are considered normal priority.
7. On the **Post-Processing** tab, specify what happens to email messages after successful or failed import. You can delete messages, move them to a specified folder within the email account, or in the case of failed import, prevent messages from being deleted. For example, if the job is run regularly, you might prevent successfully imported emails from being imported again by moving them to a specified folder.
8. Complete other import processor job pages as described in [Add or Edit an Import Processor Job](#).

You can now test the email import job. The import processor checks the configured email accounts for messages and searches folders for matching emails. If matching emails are found, the import processor creates a content capture batch and a document for each document being imported from the email message. Optionally, the import processor populates metadata fields with email metadata and deletes successfully imported messages, or it moves them to a folder.

Periodically, Content Capture fetches emails from the email account you configure on the **Email Accounts** tab. However, if you want to trigger an email import at a certain time, select an email import job in the **Import Processor Jobs** table and click the  icon. This icon is disabled if your email import job is offline.

## Configure List File Importing

With a list file import job, the import processor monitors an import folder for matching list files. It imports the document files, metadata values, and attachments identified in the list file.

Make sure the [file import agent](#) is up and running on your computer.

### Note:

The list file source follows standards defined by [RFC 4180](#). So you can use field delimiters in a field value and include new lines and tabs. For instance, if you have a comma-delimited file, you can use a comma in a field value. Similarly, to set multi-line fields in a list file, the fields must be enclosed in quotes (""). You can map multi-line fields to any ALPHA\_NUMERIC field.

To configure list file import processor job settings:

1. Generate a list file, naming it using file name characters that are supported by the operating system on which the file import agent is running.

A list file is a text file containing records of delimited data that identify the names of files to be imported and their location. Each record may also include metadata values to assign to the document or to match against a database file. The list file may also contain one or more attachment records to be imported for a document. See [Import Attachments During List File Importing](#).

2. [Add, edit, or copy an import processor job](#), selecting **List File Source** in the **Import Source** field on the General Settings page.
3. On the General Settings page, complete the **Default Locale**, **Encoding**, and **Default Date Format** fields.

These fields enable the import processor to correctly read list files based on your locale.

4. On the Document Profile page, map capture metadata fields to list file values, identifying field position in the list file using the **Field 1 - Field n** metadata attributes. You can also map system level fields, as described in [Configure Metadata Assignment During Import](#).

For example, to map a **Customer ID** metadata field with the first field in each record in the list file, you would select the **Customer ID** field in the **Metadata Field Mappings** table,

click , and select **Field 1** in the **Metadata Attributes** field of the Metadata Field Mappings dialog.

5. Complete the settings on the Import Source Settings page.
  - a. In the **File Mask(s)** field, specify the type of files to import by entering an extension. Specify \*.\* to import all files. Separate multiple masks with a semi-colon (;) character.
  - b. To monitor and import list files from subfolders within the specified folder, select the **Process subfolders** field.
  - c. From the **Create a New Batch** options, specify whether to create a new batch for each list file or folder imported. When creating a batch per folder, each subfolder processed will create a new batch.

- d. The **Maximum Files Imported Per Batch** field is enabled when you choose the **Per list file** or **Per folder** option. For both options, maximum 500 files can be imported per batch, which is also the default value. If the number of files is greater than the maximum files per batch value, then multiple batches are created.

 **Note:**

- For the **Per list file** option, if the **Maximum Files Imported Per Batch** field value is set to 500, and if there are two list files for processing, wherein the first file has 100 list items and second has 600 list items, then the first batch will consist of 100 documents, second will include 500 documents, and third batch will contain the remaining 100 documents.
- For the **Per folder** option, if the **Maximum Files Imported Per Batch** field value is set to 500, if there are two list files in the same folder, the first file contains 100 list items, and the second file includes 600 list items, then two batches will be created. The first batch will include 500 documents (first 100 from the first list file and the remaining 400 from the second list file) and second batch will contain 200 documents (the remaining 200 from the second list file).
- It's recommended that you modify your existing list file import jobs if you configured any in previous releases and set the **Maximum Files Imported Per Batch** field value for them as well.

- e. In the **Field Delimiter** field, specify how fields are delimited in the list file. Use a delimiter that will not be used in the list file metadata.  
For example, enter | (pipe), , (comma) or ~ (tilde).
- f. In the **Maximum Fields Per Document** field, specify a maximum number of fields in the list file to map to metadata fields.
- g. In the **Document File Field Position** field, enter the list file field position of document file names and locations. For example, enter 1 if the first field in each record in the list file identifies a document file path and name.

 **Note:**

If the specified document file field position does not contain a path to the file to be imported, it is assumed that the file is located in the same folder as the list file being processed.

- h. In the **List File Post-Processing** fields, specify how to change list files after import so they are not imported again if the job is run regularly. In other words, you must change the list file names so that they no longer match the **File Mask(s)** specified for the job. You can delete them, change their extension, or add a prefix to them. You can also move list files to another location of your choice.

- i. In the **Document File Post-Processing** fields, specify if you want to delete document files and their attachments from their specified location after successful import. You can choose to leave the files as they are, that is, do nothing. You can also move document files to another location of your choice.
6. Complete other import processor job pages as described in [Add or Edit an Import Processor Job](#).
7. Test the list file import job.

When the job is activated at the specified frequency, the import processor checks the folder for list files matching the specified file mask(s), imports the document files and their attachments identified in the list file, optionally populates metadata fields with list file data and deletes or renames the list file.

## Import Attachments During List File Importing

When processing a list file, the import processor imports the document files, metadata values, and attachments identified in the list file. The format to define an attachment within the list file is:

```
@Attachment[delimiter][Attachment Type][delimiter][Attachment File]
```

or

```
@Support[delimiter][Attachment Type][delimiter][Attachment File]
```

Usage of the @Attachment command is recommended.

When the import processor processes an attachment record, it imports the attachment for the document specified in the previous record. Therefore, the attachment must not be specified as the first record in the list file. Specifying the attachment as the first record will cause an error.

### Example 11-1 Example:

```
Doc1.TIF|Corp 1|Invoice
@Attachment|PO|PO1.TIF
Doc2.TIF|Corp 2|Invoice
```

In the above example, PO1.TIF is imported as a document attachment for the Doc1.TIF document. Multiple attachment records can be specified for a document.

### Example 11-2 Example:

```
Doc1.TIF|Corp 1|Invoice
@Attachment|PO|PO1.TIF
@Attachment|Contract|Contract1.PDF
@Attachment|Contract|Amendment1.PDF
Doc2.TIF|Corp 2|Invoice
```

If the attachment file is a multiple page TIFF, each page is imported as a separate batch item and assembled into an attachment.

## Configure File Importing from a Folder

With a folder import job, the import processor monitors an import folder and imports all files it finds with a specified file mask.

Make sure the [file import agent](#) is up and running on your computer. To configure folder import processor job settings:

1. [Add, edit, or copy an import processor job](#) and select **Folder Source** in the **Import Source** field on the General Settings page.
2. Configure settings on the Import Source Settings page.

- a. In the **File Mask(s)** field, specify the type of files to import by entering an extension (\*.tif or \*.pdf, for example). Specify \*.\* to import all files. Separate multiple masks with a semi-colon (;) character.
- b. If you want import processor to monitor and import files from subfolders within this folder, select the **Process subfolders** field.
- c. In the **Create a New Batch** field, specify whether to create a new batch with each file imported or with each folder imported. When a batch is created per folder, batches are created for a folder's subfolders as well.

When you choose the **Per folder** option, the **Maximum Files Imported Per Batch** is enabled. Enter a number not exceeding 500.

- d. In the **Ready File** field, optionally enter a file name that must exist in the folder (and each subfolder, if applicable) before the folder is processed. This option delays the processing of a folder until the ready file appears. When processing is completed, the ready file is deleted.
  - e. In the **File Processing Order** fields, specify the primary and secondary sort type and order in which files in the import folder are processed. Sort types options are: **None** (no sort type), **File Name**, **File Extension**, or **File Modified Date**, and sort order options are: **Ascending** or **Descending**.
  - f. In the **File Post-Processing** fields, specify how to change files after import so they are not imported again if the job is run regularly. For this, you must change the file names so that they no longer match the **File Mask(s)** specified for the job. You can delete files, change their extension, or add a prefix to them. You can also perform cleanup on processed subfolders by selecting the **Delete processed subfolder if empty** field.
3. [Complete other import processor job pages](#).
  4. Test the folder import job to make sure it is activated at the chosen frequency.

The import processor checks the folder for files matching the file mask(s). If it finds matches, it imports the files and creates new batches, populates metadata fields, and deletes or renames the files as you specified.

## Configure Metadata Assignment During Import

On the Document Profile page, you can configure how import job values are mapped to content capture metadata fields during import processing.

To configure metadata assignment during import:

1. In an import processor job, select the Document Profile page.

2. In the **Default Document Profile** field, specify a document profile to assign to imported documents. The selected profile classifies the document. For example, if users open the batch in the client, this document profile is selected.
3. In the **Metadata Field Mappings** table, map metadata fields to the values specific to the selected import source.  
  
In the **Metadata Field** column, select a capture field to populate, and click **Edit**. Regardless of the default document profile selected, all metadata fields in the procedure are available for mapping.
4. Complete settings in the **Metadata Field Mappings** dialog.
  - a. Select a metadata value for the import source in the **Metadata Attributes** field. To populate with a default value, select **Default value** in this field, then specify the value in the **Default Value** field.
  - b. In a *folder import job*, select from folder, file, or path-related attributes listed in the *System-Provided Metadata Fields for a Folder Import Job* table in [System-Provided Metadata Fields](#).
  - c. In a *list file import job*, select from the list file or actual document listed in the *System-Provided Metadata Fields for a List File Import Job* table in [System-Provided Metadata Fields](#).
  - d. In an *email import job*, select from email message-related attributes listed in *System-Provided Metadata Fields for an Email Import Job* table in [System-Provided Metadata Fields](#).
  - e. In any import job, select from common system attributes listed in *System-Provided Metadata Fields Common Across All Import Jobs* table in [System-Provided Metadata Fields](#).
5. Map other metadata fields in the **Metadata Field Mappings** table as needed.

## Configure Post-Processing of an Import Processor Job

Post-processing settings let you control what happens after import processing completes a batch.

To configure post-processing for an import processor job:

1. [Add or edit an import processor job](#) and then select the Post-Processing page.
2. In the **Batch Processor** field, select the next step--what happens after batches are created and import processing is complete. Selecting **None** allows the batch to be immediately available to the client.
3. In the **Batch Processor Job** field, select a recognition, conversions to TIFF/PDF, asset lookup, XML transformation, taxonomy, OCR processor, conditional assignment, or external processor job to run. You can make this choice here only if you selected recognition processor, a conversion processor, an asset lookup processor, or an XML transformation processor in the previous step.
4. Click **Submit** to save your changes.

## Set Up Google Mail (OAuth) for Email Import

You can configure the import processor to use Google mail OAuth to import files attached to incoming email messages along with email message elements such as subject and body text, into Content Capture. Each imported email message becomes a batch, with email elements

such as attachments, message body, or entire email message created as separate documents within the batch.


Here is what you need to do to set up Google (OAuth) email import:

- [Obtain the Redirect URL for Creating a Google Mail App](#)
- [Configure a Google Mail App for Email Import](#)
- [Configure Google Mail OAuth for Capture Email Import](#)

## Obtain the Redirect URL for Creating a Google Mail App

To be able to configure a Google Mail app, you need the content capture host name and authorization URL details of the Oracle Content Management instance you want to connect to.

To obtain the redirect URL:

1. Sign in to Oracle Content Management as an administrator and click **Capture** in the left navigation menu.
2. On the Capture Procedures page, select your procedure, and then go to the **Capture** tab.
3. In the **Import Processor Jobs** table, click  to [create a new job](#).
4. On the General Settings page:
  - a. Enter a name in the **Import Job Name** field and a prefix in the **Batch Prefix** field. Imported batches are named using this prefix, followed by a number that increments with each new batch.
  - b. In the **Import Source** field, make sure that you select **Email Source**.
5. On the Import Source Settings page, in the **Connection Protocol** section, select **Google Mail (OAuth)**.  
A Redirect URL is displayed. Copy this URL whose format is `https://<hostname>.<domainname>:<port>/capture/admin/faces/completeAuthorization`. Your URL may or may not have a port. Without a port, the URL would be in this format: `https://<hostname>.<domainname>/capture/admin/faces/completeAuthorization`

### Note:


Don't yet submit your inputs or navigate away from this page. You need to return to this page to [configure Google mail OAuth](#), after you've created a Google Mail app and obtained the Client ID and Client Secret. You'll enter them in the Client ID and Client Secret fields.

## Configure a Google Mail App for Email Import

To configure a Google Mail app:


1. Go to the [Google APIs console](#) in another browser window.



2. On the **Manage resources** page, you will see a list of your projects if you've already created them in the Google Developers Console. If you haven't done so already, do the following:
  - a. Click **CREATE PROJECT**.
  - b. Enter a **Project name**.
  - c. To help you easily identify your project in the console, edit the **Project ID** by clicking **EDIT** and entering a meaningful ID.
  - d. You need to select a location if you've defined any organizational resources or folders. If not, accept the default and click **CREATE**.  
Your project will be created, and you'll be redirected to your project list in the console.
3. On the upper left corner, click , select **APIs & Services** and then select **Dashboard**.

 **Note:**

If you are not viewing the recently created project's dashboard, select your project from the drop-down list in the upper left corner.



4. In the left sidebar, click **Library** to go to the **API Library** page. Then search for the **Gmail API** library and enable it.
5. On the upper left corner, click , select **APIs & Services** and then **OAuth consent screen**. Choose your target users on the OAuth consent screen, and then click **CREATE**.
6. On the Edit app registration page, on the **OAuth consent screen** tab:
  - In the **App name** field, enter your product name, for example, Gmail App.
  - In the **User support email** drop-down list, select your email address for user support.
  - Scroll down to the **Developer contact information** section and in the **Email addresses** field, enter your email address.
  - Click **SAVE AND CONTINUE**.
7. On the **Scopes** tab:
  - a. Click **ADD OR REMOVE SCOPES**.
  - b. In the **Update selected scopes** section, either select check boxes for the following Gmail API scopes, or manually enter these scopes in the **Manually add scopes** box and click **ADD TO TABLE**. Then click **UPDATE**.
    - <https://www.googleapis.com/auth/userinfo.email>
    - <https://www.googleapis.com/auth/gmail.modify>
    - <https://www.googleapis.com/auth/userinfo.profile>
  - c. Click **SAVE AND CONTINUE**.  
The `userinfo.email` and `userinfo.profile` scopes are displayed in the **Your non-sensitive scopes** section and the `gmail.modify` scope is displayed in the **Your restricted scopes** section on the **Scopes** tab.
8. On the **Test users** tab, click **SAVE AND CONTINUE**.
9. On the **Summary** tab, you can review your settings and then click **BACK TO DASHBOARD**.

10. Under **Publishing Status**, in the **Testing** section, click **PUBLISH APP** and then in the **Push to production?** dialog, click **CONFIRM** to publish the app.
11. On the left side bar, click **Credentials** and then do the following:
  - a. On the **Credentials** page, click **CREATE CREDENTIALS**, and then select **OAuth client ID**.
  - b. In the **Application type** drop-down list, select **Web application**.
  - c. Name the client, for example, **Gmail OAuth App Client**.
  - d. In **Authorized redirect URIs**, click **ADD URI** and paste the redirect URL you copied from your capture procedure.
  - e. In **Authorized JavaScript origins**, click **ADD URI** and paste the redirect URL, but remove everything after the domain or after the port if your URI includes a port.
  - f. Click **CREATE**.  
Your Client ID and Client Secret values are displayed in the **OAuth client created** dialog. Make a note of these values and then click **OK**.

Now go back to Content Capture in Oracle Content Management and begin where you left. That is, begin with entering the client ID and secret to [configure Google mail OAuth](#).

## Configure Google Mail OAuth for Capture Email Import


To configure Google Mail OAuth email import processor job settings:

1. Go back to your procedure and [begin where you left](#).
2. On the **Email Accounts** tab, you selected **Google Mail (OAuth)** connection protocol. Now, enter the client ID and secret you copied at the time of [configuring your Google mail app](#) in the **Client ID** and **Client Secret** fields.
3. In the **Email Accounts to Process** table, click .
4. To provide the email processor job an access to the email account, on the Google Mail sign-in page, enter the email address and password of the email ID you are going to use.
5. Confirm your choices by clicking **Allow**.  
The email ID is displayed in the **Email Accounts to Process** table under the **Email Addresses** column. Its status should be **Verified**.  
You can add more Google Mail IDs in this table using the steps you followed so far. To delete an email ID, select its row in the table and then click .
6. On the **Message Filters** tab, specify where and how to search for email messages and/or attachments.
  - a. In the **Folders to Process** field, enter one or more folders to search in the specified email accounts. The default value is the server inbox. To specify multiple folders, separate them with a ; (semi-colon). To specify subfolders, include a path delimiter applicable for the mail server, such as a / (forward slash), as in folder/subfolder.
  - b. By default, Content Capture processes all emails in the specified folder unless a message filter is applied to the job. Optionally, in the **Message Filters** table,



9. Complete other import processor job pages as described in [Add or Edit an Import Processor Job](#).

You can now test the email import job. The import processor checks the configured email accounts for messages and searches folders for matching emails. If matching emails are found, the import processor creates a batch and a document for each document being imported from the email message. Optionally, the import processor populates metadata fields with email metadata and deletes successfully imported messages, or it moves them to a folder.

Periodically, Content Capture fetches emails from the email account you configure on the **Email Accounts** tab. However, if you want to trigger an email import at a certain time, select an email import job in the **Import Processor Jobs** table and click the  icon. This icon is disabled if your email import job is offline.

# 12

## Configure Processing Settings

On the **Processing** tab, you can configure if bar codes on the documents should be recognized for business purposes such as billing or for indexing to make documents easily searchable. On this tab, you set various options for organizing the imported documents. You also configure asset lookup jobs here. It's on this tab that you configure conversion jobs to PDF and TIFF to automate how image and non-image documents should be converted and how attachments are processed. You also associate the document profiles that you create on the **Classification** tab with your conversion, recognition, and asset lookup jobs.

Here are the tasks you do on the **Processing** tab:

- [Configure Recognition Processor Jobs](#)
- [Configure Conversion Jobs to PDF](#)
- [Configure Conversion Jobs to TIFF](#)
- [Configure Asset Lookup Jobs](#)
- [Configure XML Transformation Jobs](#)
- [Configure External Processor Jobs](#)
- [Configure OCR Processor Jobs](#)
- [Configure Classification Jobs](#)
- [Configure Taxonomy Lookup Jobs](#)
- [Configure Conditional Assignment Jobs](#)

## Configure Recognition Processor Jobs

With the recognition processor, you can automate bar code recognition, document separation, and indexing for image documents in a procedure.

To learn about recognition processing and how you configure and manage recognition jobs, see:

- [About Recognition Processing](#)
- [Configure General Recognition Processor Job Settings](#)
- [Configure Jobs Based on Their Document Organization](#)
- [Configure Bar Code, Patch Code, and Separator Page Definitions](#)
- [Specify a Static or Dynamically Determined Document Profile](#)
- [Specify Metadata Field Auto Population](#)

## About Recognition Processing

The recognition processor is designed to accommodate a wide variety of document scenarios and configurations. A common recognition processing scenario is:

1. A recognition job runs as a post-processing step after client users scan and release large batches containing documents.
2. The recognition job detects bar codes and/or patch codes on each page in the batch.
3. Based on the job's selected document organization method, the recognition processor separates the batch's pages into individual documents.
4. The recognition job indexes documents by applying bar code values, default values, or values to document metadata fields.
5. As a post-processing step after recognition processing, the batch is released to the commit processor.

The main concepts underlying the recognition process are:

- [Document Organization Methods](#)
- [Other Key Recognition Processor Job Settings](#)

## Document Organization Methods

To organize documents, the recognition processor requires a batch to contain a single, image formatted document, even though that single document might actually be composed of multiple documents. During batch processing, the recognition processor organizes the batch into logical documents according to the document organization method you choose. For example, you might specify that each document contains a fixed number of pages, or that documents include separator pages between them.

You can configure the recognition job to skip document organization for batches whose documents are already separated but need bar code recognition only. You specify a document organization method on the Document Organization page of recognition job. You can select one of the following methods:

- **Fixed number of pages per document** ([Configure a Job for Documents Containing a Fixed Number of Pages](#))
- **Same bar code value on each page** ([Configure a Job for Documents with the Same Bar Code Value on Each Page](#))
- **Separator pages** ([Configure a Job for Batches with Separator Pages between Documents](#))
- **Hierarchical separator pages** ([Configure a Job for Documents with Hierarchical Separators](#))
- **None: Do not perform document organization** ([Configure a Job for Batches that do not need Document Organization](#))

## Other Key Recognition Processor Job Settings

In addition to [Document Organization Methods](#), other key interrelated recognition job settings that enable the recognition processor to perform automated bar code recognition, document separation, and index are:

- [Settings for Detecting and Identifying Bar Codes and Patch Codes](#)
- [Settings for Separating Documents](#)
- [Settings for Handling Attachments](#)

- [Settings for Classifying Documents](#)
- [Settings for Assigning Metadata Values](#)
- [Post-Processing Settings After Recognition Processing](#)

## Settings for Detecting and Identifying Bar Codes and Patch Codes

When you're creating a recognition job, you can specify how recognition processor detects and identifies bar codes:

- On the Bar Code Recognition page, the **Universal Decoder** is selected by default. You specify which bar codes to detect, other settings specific to bar codes, and patch code detection. The recognition processor searches through all pages, recognizing bar codes set for detection in the job. The following options are available on this page:

**Table 12-1 Universal Decoder Options**

Option	Description
1-D Symbologies	Select from a list of 1-D bar code symbologies that you want recognition processor to search for. 1-D symbologies that you can choose include: <ul style="list-style-type: none"> <li>– Code 128</li> <li>– Code 39</li> </ul>
2-D Symbologies	Select the 2-D bar code symbologies you want recognition processor to search for. 2-D symbologies that you can choose include: <ul style="list-style-type: none"> <li>– PDF417</li> <li>– QR code</li> </ul>
Maximum Bar Codes per Image	Specify the maximum number of bar codes per image between 0 and 10. The decoder will stop processing an image once it detects or exceeds the value specified in this setting. This setting helps to optimize system performance. By default, this option is set to 1.
Minimum Bar Code Height	Specify the height of the shortest bar code that may exist on an image between 0.2 in and 3 in. By default, this option is set to 0.5 in. This setting applies only to 1-D bar code symbologies. This setting helps recognize diagonal barcodes.
Unit of Measure	Select the unit of measure for the <b>Minimum Bar Code Height</b> setting and <b>Maximum Bar Code Width</b> setting from the drop-down list. The options available are <b>inch</b> and <b>cm</b> . The decimal precision is 3.
Maximum Bar Code Width	Specify the maximum width of the widest bar code that may exist on an image between <b>Minimum Bar Code Height</b> and 10 in. By default, this option is set to 2 in. This setting applies only to 1-D bar code symbologies. This setting helps recognize diagonal barcodes.
Minimum Bar Code Characters	Specify the minimum number of characters for a bar code to be considered for processing between 1 and 1000. By default, this option is set to 1.

**Table 12-1 (Cont.) Universal Decoder Options**

Option	Description
Interpret Bar Code Value as Patch Code	<p>Use this setting to map a bar code value to a patch code type.</p> <p>If a specified bar code value is recognized, you can specify to interpret it as a patch code type and not as a bar code value.</p> <p>Specify an alphanumeric bar code value in the <b>Bar Code Value</b> text fields adjacent to each patch code type listed under <b>Patch Code</b>:</p> <ul style="list-style-type: none"> <li>– I</li> <li>– II</li> <li>– III</li> <li>– IV</li> <li>– VI</li> <li>– T</li> </ul> <p>Only the first match in a page will be converted into patch code. The rest of the bar codes will not be converted to patch codes even if their values match the ones specified in the mapping.</p> <p>Bar code value comparison is case-sensitive.</p>

 **Note:**

You are encouraged to select the bar code symbology if you are familiar with it. The symbology improves performance and decreases the risk of detecting unknown bar codes that may interfere with processing.

- On the Bar Code Definition page, you specify one or more bar code definitions, which identify a bar code by its characteristics such as its length in characters. When you are creating a bar code definition, you can choose from the following validation rules:
  - **Length**
  - **Mask**
  - **Regular Expression**
  - **Choice List** (where a bar code on the page must match a value contained in the selected choice list)
  - **None**

As the recognition processor recognizes bar codes and when these codes meet the validation condition, they are assigned to a bar code definition. In a job, you use these bar code definitions in a variety of ways such as when assigning metadata and separating pages. For information on managing bar code definitions, see [Add or Edit Bar Code Definitions](#).

## Settings for Separating Documents

A range of options for defining document separation, including bar code and/or patch code separators are available to you.

The document separation options you specify on the Document Processing page depend on the document organization method you choose (see [Document Organization Methods](#)).



- If you specify that *documents contain a fixed number of pages*, then you also must specify the number of pages per document. When the job reaches this number, it identifies a new document and restarts counting for the next document in the batch. No separators are needed.
- If you specify that *documents include the same bar code value on each page*, you must specify the bar code definition to use for separation. When the job encounters that bar code definition with a different bar code value, it creates a new document. No separators are needed.
- If you specify that *documents are organized based on separator pages*, either single separators or hierarchical separators, you must specify bar code and/or patch code separator rules.
- If you specify that *no document organization be performed*, any previous document separation remains. In certain atypical configurations, you can optionally use separators.

## Settings for Handling Attachments

You can specify if and how to include a source document's attachments in the documents you created, using the options available on the Document Processing page. You can choose from the following options available in the **Source Document Attachments** field:

- Select the **Include all attachments to created documents** (default) option to include all the attachments of the source document in the created documents.
- Select the **Include attachments with matching Document Profile attachment types** option to include all attachments of the source document that match the attachment types specified in the document profile.
- Select the **Do not include attachments** option if you do not want to include source document's attachments to the created documents.

### Note:

The **Source Document Attachments** field is not available on the Document Processing page if **None: Do not perform document organization** option is selected on the Document Organization page.

## Settings for Classifying Documents

When processing documents, the recognition processor determines which document profile it should use to identify the metadata fields available for indexing a document. On the Document Profile page, you specify how a document profile is assigned to documents when they are processed by the recognition job. See [Specify a Static or Dynamically Determined Document Profile](#). The document organization method you choose affects document profile assignment options. You can choose a document profile assignment that is:

- *Static*, by completing the **Default Document Profile** field.  
The recognition job uses the default document profile when the **Do not determine dynamically** field is selected or when no matching dynamically determined document profile is found.
- *Dynamically determined*, based on a bar code or separator page value, depending on document organization.

## Settings for Assigning Metadata Values

You can configure a recognition job to assign metadata values on the Fields page, configure metadata fields from the procedure to auto populate with any of the following values: bar code value, batch name, default value, scan date, or index date.

## Post-Processing Settings After Recognition Processing

You can apply settings available on the Post-Processing page to specify what happens after recognition processing completes:

- *If no system errors occur*, specify the next batch processor, and, if applicable, also specify which job should be run. For example, you might set commit processor as the next step. You can also specify **None** for no post-processing action. (If **None** is selected, the client must process the batch. For example, a client user may review the batch for accuracy and release the batch to the commit processor.) You can also send an email notification and change batch name, status, and priority after successful recognition processing completes.
- *If one or more system errors occur*, specify the next batch processor, and, if applicable, also specify which job should be run. You can select **None** so batches are released to client users for indexing. You can also send an email notification, and change batch name, status, and priority to alert the appropriate people when recognition processing system errors are encountered.



## Configure General Recognition Processor Job Settings


These are the common tasks you perform when working with recognition processor jobs. (See [Configure Jobs Based on Their Document Organization](#) for information on configuring specific types of recognition jobs.)

- [Add or Edit a Recognition Job](#)
- [Deactivate or Delete a Recognition Job](#)
- [Configure Post-Processing and Monitoring of a Recognition Processor Job](#)
- [Configure Batch Flow to a Recognition Processor Job](#)

## Add or Edit a Recognition Job

To add or edit a recognition job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processing** tab.
3. In the **Recognition Processor Jobs** table, click  to create a job. You can edit a job by selecting it and clicking .

You can also copy a recognition job by selecting it, clicking , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

4. On the General Settings page, enter a name for the job.
5. On the Bar Code Recognition page, specify settings specific to bar code recognition and identify bar code types (symbolologies) for the recognition job to detect.  

The bar code symbology improves performance and decreases the risk of detecting unknown bar codes that may interfere with processing.
6. On the Bar Code Definition page, add bar code definitions.  

For background information, see [Settings for Detecting and Identifying Bar Codes and Patch Codes](#). For steps, see [Add or Edit Bar Code Definitions](#).
7. On the Document Organization page, specify how documents in batches are composed.  

See [Document Organization Methods](#).
8. On the Document Profile page, specify a document profile or configure one to be dynamically determined. The settings that display are according to the selected document organization method. You must select a default document profile.  

For background information, see [Settings for Classifying Documents](#). For steps, see [Specify a Static or Dynamically Determined Document Profile](#).
9. On the Document Processing page, specify how documents should be separated and processed. The available settings are according to the document organization method you choose. If documents should be separated by single or hierarchical separators, configure bar code or patch code separator rules.  

For background information, see [Settings for Separating Documents](#). For steps, see [Configure a Separator Page Definition](#).

On this page, you can also specify how attachments should be included if you choose a document organization method in the Document Organization page. See [Settings for Handling Attachments](#).
10. On the Fields page, [set bar codes or other values to auto populate metadata fields](#) for each document.
11. On the Post-Processing page, specify what happens after recognition processing completes.  

See [Configure Post-Processing and Monitoring of a Conversion Job to TIFF](#).
12. Review settings on the Summary page and click **Submit**.
13. [Configure how batches flow to the recognition processor job](#).
14. Test the recognition processor job.



## Deactivate or Delete a Recognition Job

When you delete a recognition job, it becomes unavailable for batches for whom it is set as a post-processing step. Before deleting a recognition job, you might want to take it offline to resolve unexpected issues. Online recognition jobs run when selected in a client profile or processor job's Post-Processing page. You can temporarily stop the job from running (take it offline) or change a deactivated job to run again.

 **Note:**

You cannot delete batch processing jobs if they are configured as a post processing job in another batch processor.

To deactivate or delete a recognition job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processing** tab.
3. In the **Recognition Processor Jobs** table, select a job to first deactivate it and click .  
To deactivate or activate a recognition job, You can also deactivate or activate a job by selecting or deselecting the **Online** field on the General Settings page.
4. In the **Recognition Processor Jobs** table, select the deactivated job and click .
5. When prompted, click **Yes** to confirm that you want to delete this recognition job.

## Configure Post-Processing and Monitoring of a Recognition Processor Job

Post-processing options of a recognition job let you specify what happens after processing completes. You specify the settings configured in this procedure separately for successful and failed batches.

To configure post-processing settings:

1. [Add or edit a recognition processor job](#).
2. Click the Post-Processing page to display the processing options for successful processing (no system errors) and unsuccessful processing (one or more system errors).
3. In the **Batch Processor** and **Batch Processor Job** fields, specify which processing step, if any, occurs after recognition processing completes. *Only those batch processor jobs that you have defined for your procedure are available for selection. For example, if you didn't define a recognition processor job, then the recognition processor option will not be available in the Batch Processor field.* If you choose recognition processor or conversions to TIFF/PDF in the Batch Processor field, then specify the corresponding processor job.  
  
For example, you might send batches with no system errors to the commit processor. You might specify None for batches with system errors, then change their batch status or prefix to facilitate further processing in the client.
4. In the email address fields, optionally enter an address to which an email is sent after processing completes successfully or fails. While you are configuring and testing a recognition processor job, set yourself to receive email notifications upon system errors. And, then later automatically alert an administrator of processing errors.
5. In the remaining fields, specify how to change processed batches.

- Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix **ERR** for follow-up.
  - Change batch status or priority. For example, you might change the status of batches with system errors, then create a client profile with batch filtering set to this status to allow qualified users to manually edit and complete batches that encountered errors.
6. Click **Submit** to save the job.

## Configure Batch Flow to a Recognition Processor Job

To run a recognition job, you must configure batches to flow to the job for processing. You do this by identifying the recognition processor job as the post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). (See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).) For example, you might create a client profile for scanning documents into batches and then releasing them for recognition processing. Or, you might create an import processor job that first imports email messages and their PDF attachments, then sends them to the conversion processor for converting them to image format, and finally sends the documents for recognition processing.

Remember that unless you plan to skip document organization, recognition processor expects batches to contain a single, image formatted document, as described in [Document Organization Methods](#).

## Configure Jobs Based on Their Document Organization

These are the ways in which you can configure recognition jobs for different organization types:

- [Configure a Job for Documents Containing a Fixed Number of Pages](#)
- [Configure a Job for Documents with the Same Bar Code Value on Each Page](#)
- [Configure a Job for Batches with Separator Pages between Documents](#)
- [Configure a Job for Documents with Hierarchical Separators](#)
- [Configure a Job for Batches that do not need Document Organization](#)

### Configure a Job for Documents Containing a Fixed Number of Pages

With this document organization method, batches contain documents with a fixed number of pages. On the Document Processing page of a job, you specify the number of pages per document and the number of pages within a document to read bar codes.

Examples of this organization method include:

- *One page documents* where a bar code exists on each page and each page represents a unique document. In this example, because each page must contain a bar code, Page 3 (where no bar code was found or recognized) would require manual data entry.
- *Two page documents*, such as the front and back sides of a page scanned in duplex mode. While the document's first page typically includes the bar code, the second page would include the bar code if the back side of the page was inadvertently scanned first.
- *Form documents* consisting of a fixed number of pages. For example, an organization's business agreement may always consist of five pages. If the number of pages is

unknown or attachments are scanned with documents, you may need to [use a separator page method](#).

To configure a recognition job for documents containing a fixed number of pages:

1. On the **Processing** tab, [add or edit a recognition processor job](#).
2. On the Document Organization page, select the **Fixed number of pages per document** method.
3. On the Bar Code Recognition page, configure bar codes to be recognized.
4. On the Bar Code Definition page, [configure how bar codes are detected](#).
5. On the Document Profile page, specify the group of metadata fields to apply to the recognition job by selecting a previously created document profile ([Add or Edit a Document Profile](#)) in the **Default Document Profile** field. You can [determine a document profile dynamically](#) using a selected bar code.
6. On the Document Processing page, complete settings specific to **Fixed number of pages per document** jobs, whose organization is set on the Document Organization page.
  - a. In the **Number of Pages Per Document** field, enter the fixed number of pages each document contains.
  - b. Specify a number in the **Number of pages per document to read bar codes** field.

This setting optimizes performance by executing bar code recognition on the first specified number of pages of each document. For example, if the bar code was on page 3 of 10, you would specify 3 so that bar code recognition occurs on the first 3 pages of each document. You can also use this field to ensure that conflicting bar codes in later document pages are disregarded.
  - c. Specify an action in the **If more than one value is found for a bar code within a document** field: use the first value found, overwrite the bar code value, or clear the bar code value.
  - d. Specify [how source document's attachments should be included](#) in the created documents.
7. [Configure metadata assignment settings](#) on the Fields pages.
8. Click **Submit** and test the recognition job's functionality.

## Configure a Job for Documents with the Same Bar Code Value on Each Page

With this document organization method, batches consist of multiple page documents where each page of a document contains the same bar code value. Thus, a change in bar code value between pages indicates the start of a new document. For example, a customer agreement document might contain a customer ID bar code on each page.

On the Document Processing page of a job, you specify which bar code the job uses to determine document separation and a maximum number of pages per document.

To configure a job for documents with the same bar code value on each page:

1. On the **Processing** tab, [add or edit a recognition processor job](#).
2. On the Document Organization page, select the **Same bar code value on each page** organization.

3. On the Bar Code Recognition page, configure bar codes to be recognized.
4. On the Bar Code Definition page, [configure how bar codes are detected](#). At a minimum, [create the bar code definition](#) that will determine document separation.
5. On the Document Profile page, specify the group of metadata fields to apply to the recognition job by selecting a previously created document profile ([Add or Edit a Document Profile](#)) in the **Default Document Profile** field. You can [determine a document profile dynamically](#) using a selected bar code.
6. On the Document Processing page, complete settings specific to the selected document organization (Same bar code value on each page).
  - a. Select the bar code definition you created in step 4 in the **Bar Code That Determines Document Separation** field.
  - b. Specify a number in the **Maximum Number of Pages Per Document** field to limit the number of pages permitted in a document. This is an optional field. Specify 0 to skip specifying the maximum number of pages per document.
  - c. In the **Process Option** field, optionally enable the **optimistic bar code detection** feature. If a bar code cannot be read or is not present on a page and this feature is active, the recognition processor compares values for the previous and next pages and assigns a value accordingly.  
  
 For example, a three page batch contains page 1 with bar code A, page 2 with no bar code, and page 3 with bar code A. When the optimistic bar code detection feature is enabled, the recognition processor groups all 3 pages in the same document. When it is not enabled, pages 1 and 3 are grouped into one document excluding page 2.
  - d. Specify an action in the **If more than one value is found for a bar code within a document** field: use the first value found, overwrite the bar code value, or clear the bar code value.
  - e. Specify [how a source document's attachments should be included](#) in the created documents.
7. [Configure metadata assignment settings](#) on the Fields page.
8. Click **Submit** and test the recognition job's functionality.

## Configure a Job for Batches with Separator Pages between Documents

With **Separator pages** selected as the **Document Organization** method, batches consist of multiple page documents that are separated by a document separator page. (Document organization for hierarchical levels of document separators is covered in [Configure a Job for Documents with Hierarchical Separators](#).) With this organization type:

- The separator page indicates the beginning of a new document. Separator pages can be retained or removed from the document.
- The separator page can contain bar codes and/or patch codes to indicate a new document.
- You create rules that govern how separator pages are detected. For example, you configure document separation to occur when either a specified bar code or a patch code is detected or require that both are detected. See [Configure a Separator Page Definition](#).

To configure a job for batches with separator pages between documents:

1. On the **Processing** tab, [add or edit a recognition processor job](#).

2. On the Document Organization page, select the **Separator pages** method. (This method is the default document organization.)
3. On the Bar Code Recognition page, configure bar code symbologies to be recognized.
4. On the Bar Code Definition page, [configure bar code settings for the documents](#) to process. Configure all bar codes, including the separator page bar code and any others that might provide document profile or metadata values.
5. On the Document Profile page, specify the group of metadata fields to apply to the recognition job by selecting a previously created document profile ([Add or Edit a Document Profile](#)) in the **Default Document Profile** field. You can [determine a document profile dynamically](#) using a selected bar code.
6. On the Document Processing page, complete settings specific to the selected **Document Organization (Separator pages)**.
  - a. Click **Configure** and [configure the separator page](#).
  - b. Specify a number in the **Maximum Number of Pages Per Document** field to limit the number of pages permitted in a document. This is an optional field. Specify 0 to skip specifying the maximum number of pages per document.

This field is helpful in detecting missing separator pages or separator pages that failed recognition. If recognition processor reaches this number, images between the last valid document and the next separator sheet detected remain in the batch for manual indexing. For example, if you know that documents in the job's batches do not exceed 25 pages, enter this number to ensure that multiple documents are not combined if a document separator page is not detected or missing.
  - c. Specify an action in the **If more than one value is found for a bar code within a document** field: use the first value found, overwrite the bar code value, or clear the bar code value.
  - d. Specify [how a source document's attachments should be included](#) in the created documents.
7. Click **Submit** and test the recognition job's functionality.

## Configure a Job for Documents with Hierarchical Separators

Recognition processor's hierarchical separator feature allows you to process and organize documents within a hierarchy of levels. For example, you might use a two level hierarchy with folder and document levels, where documents inherit higher level folder metadata values until the next folder level separator page is detected.

Hierarchical separators are particularly useful in configuring back file conversions, where large volumes of documents stored in folders and boxes are digitized. A third party application can generate the hierarchical separator pages needed, which preparers insert to prepare stacks of documents, folders, and/or boxes for scanning and recognition processing.



 **Note:**

- If a document separator is detected but the metadata values are not obtained, all metadata values are cleared at the applicable level and below to prevent unintentionally applying the wrong metadata values to a document.
- In the case of hierarchical separator pages, a top level separator page must be the first page of the document, while lower level separator pages cannot be the first page, but may or may not be the second page.

To configure a job for batches with hierarchical separators to organize documents:

1. On the **Processing** tab, [add or edit a recognition processor job](#).
2. On the Document Organization page, select the **Hierarchical separator pages** method.
3. On the Bar Code Recognition page, configure bar codes to be recognized.
4. On the Bar Code Definition page, [configure bar code settings for the documents](#) to process. Configure all bar codes, including separator pages and any others that provide document profile or metadata values.
5. On the Document Profile page, specify the group of metadata fields to apply to the recognition job by selecting a previously created document profile ([Add or Edit a Document Profile](#)) in the **Default Document Profile** field. You can [determine a document profile dynamically](#) using a previously created bar code or page separation definition.
6. On the Document Processing page, complete settings specific to hierarchical separator jobs.
  - a. Specify an action in the **If more than one value is found for a bar code within a document** field: use the first value found, overwrite the bar code value, or clear the bar code value.
  - b. [Configure hierarchical separator pages](#) in the Document Hierarchy Separator Pages table.
  - c. If you chose to determine a document profile dynamically using a separator page defined in step 5, a **Document Profile** column displays in the Document Hierarchy Separator Pages table for mapping page separator definitions with document profiles.
  - d. Specify [how a source document's attachments should be included](#) in the created documents.
7. [Configure metadata assignment settings](#) on the Fields page.
8. Click **Submit** and test the recognition job's functionality.

## Configure a Job for Batches that do not need Document Organization

If batches are already organized into documents, you can skip the document organization process and proceed to recognize bar codes and index documents.

- Batches processed with this method are already separated into documents. For example, you might choose this option for batches created by the import processor where each document in a batch represents an email attachment.

- Unlike other organization methods, batches processed with this method may contain image and non-image documents. Because documents must be in image format for recognition processor to read their bar codes or patch codes, any non-image documents encountered are unaffected.

To configure a job for batches that do not need document organization:

1. On the **Processing** tab, [add or edit a recognition processor job](#).
2. On the Document Organization page, select the **None: Do not perform document organization** method.
3. On the Bar Code Recognition page, configure bar codes to be recognized.
4. On the Bar Code Definition page, [configure bar code settings for the documents](#).
5. On the Document Profile page, specify the group of metadata fields to apply to the recognition job by selecting a previously created document profile ([Add or Edit a Document Profile](#)) in the **Default Document Profile** field. You can [determine a document profile dynamically](#) using a selected bar code.
6. On the Document Processing page, complete settings specific to no document organization jobs.
  - a. Optionally, click **Configure** and [set up a separator page definition](#).

 **Note:**

The purpose of detecting a separator for this type of job is to remove it from the document.

- b. Specify a number in the **Number of pages per document to read bar codes** field. Specify 0 to perform bar code recognition on all document pages.

This setting optimizes performance by executing bar code recognition on the first specified number of pages of each document. For example, if the bar code is on page 3 of 10, you would specify 3 so that bar code recognition occurs on the first 3 pages of each document. You can also use this field to ensure that conflicting bar codes in later document pages are disregarded.
  - c. Specify an action in the **If more than one value is found for a bar code within a document** field: use the first value found, overwrite the bar code value, or clear the bar code value.
7. [Configure metadata assignment settings](#) on the Fields page.
  8. Click **Submit** and test the recognition job's functionality.

## Configure Bar Code, Patch Code, and Separator Page Definitions

You can use bar code definitions throughout the job. You can define patch codes for page separation. You can combine patch code detection with bar codes by creating separation page definition rules.

Here is how you configure definitions for bar codes and separator pages for a recognition processing job:

- [Add or Edit Bar Code Definitions](#)
- [Configure a Separator Page Definition](#)

- [Configure Hierarchical Separator Page Definitions](#)



## Configure a Separator Page Definition

As described in [Settings for Separating Documents](#), if you choose to organize documents using separator pages, you must configure one or more rules that define how separators are detected and used.

### Note:

To configure hierarchical separator page definitions, see [Configure a Separator Page Definition](#).


To configure a separator page definition:

1. In your procedure, create a recognition processor job with a document organization method of **Separator pages** or **None: Do not perform document organization**.
2. On the Document Processing page, next to **Separator Page**, click **Configure** to define or edit the separator page by specifying one or more rules in the **Separator Page Definition** dialog that is displayed:
  - a. In the **Name** field, enter a name for the separator page definition. Optionally, select the **Remove separator page** field to remove the separator page from the document. If deselected (the default), separator pages are included in the document.
  - b. Click  in the Rules table. To edit a rule, select it and click .
  - c. In the Separator Page Rule page, create a rule.
    - i. Enter a name in the **Rule Name** field.
    - ii. To indicate the start of a new document, select a patch code (**I, II, III, IV, VI, or T**), a previously created bar code definition, or both.
    - iii. If you specify both a patch code and a bar code or specify multiple bar code definitions, select **Or** or **And** in the **Operator** field to indicate if one or all must be detected on a page for the page to be identified as a separator.

### Note:

In addition to specifying *And* or *Or* conditions *within* rules, you specify *And* or *Or* conditions *between* rules, by selecting **And** or **Or** in the **Operator** field in the Rules table.

- iv. If you want blank pages to be considered as separators, select the **Treat Blank Page as a separator** check box. This option is not available if you select the **AND** operator.
- v. Click **OK**.
- d. Repeat the previous step to create additional rules in the **Rules** table.
- e. Click **Submit** to save the separator page definition and return to Separator Page Definition.

To remove a separator page rule, select it in the Rules table and click .

 **Note:**

To delete a separator page definition, click **Delete** next to **Configure**.

3. To set the page bytes so the page is considered blank, enter a value in the **Blank Page Byte Threshold** field. For example, if you enter 16000 in this field, then the pages of 16000 bytes or lesser are considered blank pages.
4. If you want blank pages to be removed at the time documents are processed in the Content Capture Client environment, select the **Remove Blank Pages** check box.

 **Note:**


The **Blank Page Byte Threshold** field and the **Remove Blank Pages** check box are interdependent. So if you set the blank page byte threshold but do not set blank pages for removal, the pages of the defined bytes won't be removed. Similarly, if you select the Remove Blank Pages check box but do not set the blank page byte threshold, no pages will be removed.

5. Click **Submit** to save the job.

## Add or Edit Bar Code Definitions

A bar code definition identifies a bar code by its validation rule, such as its length in characters. As bar codes are recognized, they are assigned to a bar code definition based on the definition's validation rule which considers the data characteristics of the bar code value. Once defined, you can use a bar code definition throughout a recognition job, including for page separation, auto populating metadata fields, and assigning document profiles. (Bar code definitions are not shared between recognition processor jobs.)

To add or edit a bar code definition:

1. [Add or edit a recognition job](#).
2. On the Bar Code Definition page, click  in the **Bar Code Definitions** table.
3. In the Bar Code Definition dialog, enter a name for the bar code definition.
4. In the **Validation Rule** field, specify how recognition processor should validate the bar code.

**Table 12-2 Validation Rule Types**

Validation Rule Type	Description	Example
None	Specifies no validation.	This option is typically used to allow a script to populate the bar code definition value.
Length	Maps any bar code value where the length of the bar code value matches the definition.  The length does not include unique bar code symbols such as start, stop and check digits (unless included).	To match a value three characters in length, enter:  3
Mask	Specify a filter that controls which values are accepted, such as numbers or alphanumeric characters.	To match an ID number such as 123-45-6789, you might enter:  ###-##-####  Available mask characters are listed in the <b>Input Mask Characters</b> table.
Regular Expression	Specify a regular expression that defines which values are accepted.	To match a value of a, b, or c, you would enter:  [abc]  For more information, refer to documentation relating to using and formatting regular expressions, such as the following:  <a href="http://docs.oracle.com/javase/tutorial/essential/regex/">http://docs.oracle.com/javase/tutorial/essential/regex/</a>
Choice List	A bar code value must match a value contained in the specified choice list.	A job contains documents with bar codes that identify their document type. A document type choice list contains values such as mortgage application, credit report, and credit reference. Any bar code value that is read that matches a choice list value is assigned to the specified bar code definition.

After you select a rule, additional value fields are displayed (**Length** for length-type validation, **Mask** for mask-type validation, **Regular Expression** for regular-expression validation, and choice list fields for choice list validation).

5. Below the **Validation Rule** field specify validation values for the selected validation rule.

If specifying an input mask, enter a mask that describes the bar code value in the **Mask** field displayed. A recognized bar code is assigned to this bar code definition if the value meets the requirements of the mask you specify.

 **Note:**

Avoid configuring bar code definitions that conflict, such as two bar codes with the same length in characters. If necessary, consider using a script to use business logic to assign bar codes.

**Table 12-3 Input Mask Characters**

Mask	Regular Expression They Convert To	Explanation
?	. (period)	Use to match any single character.
#	\d	Use to match any single number. If a job contains documents with an identification number (for example, 123-45-6789), the mask would be ###?##?####.
*	.*	Use to match zero, one, or more characters.
[abc]	[abc]	Matches any single character specified from a group of one or more characters. Be sure to include the brackets ([ ]). To search for a specific bar code such as <i>claim</i> , the format would be [c][l][a][i][m].
[!abc]	[^abc]	Matches any single character not specified. Functions the same as <i>[abc]</i> , except that with the exclamation point, a match results if any character <i>except</i> the characters specified in <i>[abc]</i> is found.
[a-zA-Z]	[a-zA-Z]	Use a hyphen (-) to specify a range of characters. Character ranges must be specified in ascending order ([A-Z], not [Z-A]). For example, [A-Z] results in a match if a character in the A-Z range is found.

6. Click **OK**.

The definition is listed in the Bar Code Definitions table.







## 7. Repeat steps 2 through 6 to create additional bar code definitions.

## Configure Hierarchical Separator Page Definitions

As described in [Settings for Separating Documents](#), if you choose to organize documents using hierarchical separators, you must configure separator page definitions for each hierarchy level that detect patch codes and/or bar codes. (To configure document separation for single level separator jobs or no organization jobs, see [Configure a Separator Page Definition](#).)

To configure page separation for hierarchical separator jobs:

1. In your procedure, add or edit a hierarchical separator page job. See [Configure a Job for Documents with Hierarchical Separators](#).

2. On the Document Processing page, click  in the Document Hierarchy Separator Pages table to add a hierarchical separator page definition. To edit a definition, select it and click .
3. In the Separator Page Definition dialog, create a definition for one of the hierarchy levels.
  - a. In the **Name** field, enter a name for the separator page definition.
  - b. Optionally, select the **Remove separator page** field to remove the separator page from the document or attachment. If deselected (the default), separator pages are included in the document or attachment.
4. In the **Attachment Type** field, select an attachment type from the list of defined attachment types to define a separator page to be included to an attachment. The **Document Profile** field is available only when you select **Determine dynamically using separator page** option in the **Dynamic Document Profile Option** field on the Document Profile page. The **Attachment Type** field is set to **None** and is disabled if you select a document profile in the **Document Profile** field. You can define an attachment type separator page only at the last hierarchy level.
5. Add or edit rules for the separator page definition.
  - a. Click  in the Rules table.
  - b. To edit a rule, select it and click .
6. In the Separator Page Rule dialog, define a rule.
  - a. Enter a name in the **Rule Name** field.
  - b. To indicate the start of a new document or attachment, select a patch code (**I**, **II**, **III**, **IV**, **VI**, or **T**), a previously created bar code definition, or both.
  - c. If you specify both a patch code and a bar code or specify multiple bar code definitions, select **Or** or **And** in the **Operator** field to indicate if one or all must be detected on a page for the page to be identified as a separator.
  - d. Click **OK**.
7. Repeat steps 5 and 6 to create additional rules for the page separator.
  - a. In addition to specifying *And* or *Or* conditions within rules, you specify *And* or *Or* conditions between rules by selecting **And** or **Or** in the **Operator** field in the Rules table. For example, you might require both Rule 1 AND Rule 2 to match for separator detection, although each rule may provide two methods for matching (patch code OR bar code).
  - b. To remove a separator rule, select it in the Rules table and click .
  - c. Click **Submit** to save the separator page definition.  
The separator page definition you created is listed in the Document Hierarchy Separator Pages table.
8. Repeat steps 2 through 7 to create additional page separator definitions.
  - To remove a definition, select it in the table and click .

- Click **Up** or **Down** to move a selected definition in the hierarchy to correctly reflect how the separator pages will be organized within a batch.
9. Click **Submit** to save the job.

## Specify a Static or Dynamically Determined Document Profile

You can configure a recognition job to determine the document profile that identifies the metadata fields available to index a document.

For background information, see [Settings for Classifying Documents](#).

To specify a static or dynamically determined document profile:

1. In a selected procedure, [create a recognition processor job](#).
2. Select the **Document Profile** page to specify settings.
3. In the **Default Document Profile** field, specify a profile.

The recognition job uses the default document profile when the **Do not determine dynamically** field is selected or when no matching dynamically determined document profile is found.



4. In the **Dynamic Document Profile Option** field, specify if and how to dynamically determine a document profile. You can determine the document profile in the following ways:
  - Specify a static one by selecting **Do not determine dynamically** and choosing a profile in the **Default Document Profile** field.
  - Determine dynamically using a bar code definition, by selecting **Determine dynamically using bar code** and completing step 5.
  - Determine dynamically using separator page definition, by selecting **Determine dynamically using separator page** and completing step 6. This option is available only when **Hierarchical separator pages** is selected as the document organization method.
5. If you selected **Determine dynamically using bar code** in step 4, complete configuration.
  - a. In the **Bar Code** field, select a bar code definition whose value will be used as mapped in the table to determine the document profile.
  - b. In the **Document Profile and Bar Code Value Mappings** table, map possible bar code values with the document profile to use.

Click **Edit**. In the Document Profile and Bar Code Value Mappings dialog, specify if the bar code value must match a single value or match any item in a specified choice list. If matching a single value, specify the value. If matching any item in a choice list, specify the choice list source and choice list.

Map additional document profiles to bar code values in the table, if needed.
6. If you selected **Determine dynamically using separator page** in step 4, complete the configuration as follows:
  - a. Click the Document Processing page.

A **Document Profile** column is displayed in the Document Separator Hierarchy Pages table.




- b. Click  or  in the table.
  - c. In the Separator Page Definition dialog, select a profile in the **Document Profile** field for the hierarchy separator page. This field is set to **None** and is disabled if you select an attachment type in the **Attachment Type** field.
  - d. Repeat steps 6b and 6c to assign document profiles to hierarchy separator page definitions.
7. Click **Submit** to save the job.

## Specify Metadata Field Auto Population



During recognition processing, you can auto populate metadata fields using a bar code value, batch name, default value, index date, or scan date.


To configure auto populating:

1. In a selected procedure, [create a recognition processor job](#).
2. Click the **Fields** page. A table listing metadata fields defined for the procedure is displayed.
3. Select a field to auto populate and click .
4. In the Edit Recognition Job dialog, select an auto population method in the **Auto Populate With** field.
5. If auto populating with a bar code value or default value, specify the bar code or default value in the additional field that displays, and click **OK**.
6. Repeat steps 3 through 5 to configure additional fields for auto population.
7. Click **Submit** to save the job.

## Configure Conversion Jobs to PDF

By creating conversion jobs to PDF, you can convert documents to PDFs.

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processing** tab.
3. In the **Conversion Jobs to PDF** table, click , or to edit an existing job, click .

You can also copy a conversion job by selecting it, clicking , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

4. On the **Document Selection** page:
  - a. In the **Job Details** section, enter a name and description for the job name, and to make the job available for processing, select the **Online** check box.
  - b. In the **Document Conversion** section:
    - Select the **Convert Documents** check box.

- To process documents for specific document profiles, select one or more document profiles listed in the **Restrict to Document Profiles** field, or select **All** to process documents for all defined document profiles.
- c. In the **Attachment Conversion** section:
  - Select the **Convert Attachments** check box.
  - To process attachments for specific attachment types, select one or more attachment types listed in the **Restrict to Attachment Types** field, or select **All** to process attachments for all defined attachment types.
- 5. On the **Output Destination** page, in the **Document Destination** section (this section is enabled if you selected the **Convert Documents** check box in the **Document Conversion** section):
  - a. In the **Conversion Output Destination** drop-down list, select a suitable option:
    - **Document**: Replaces the original document with the conversion results. You can also change the document profile if desired in the **New Document Profile** drop-down list.
    - **Document, Preserve Copy**: Replaces the original document with the results, but allows for a copy of the original to be preserved as an attachment in the Content Capture Client. You can also choose a document profile if you select this option. However, you must select an attachment type from the **Preserve Attachment Type** drop-down list.
    - **Attachment**: Stores the results of the conversion as an attachment. You must select an attachment type from the **New Attachment Type** drop-down list. This drop-down list provides those attachment types that you configured in your document profile. If your document profile doesn't include any attachment types, then those that you created on the Classifications tab in the Attachment Types section are available for you to choose from.
  - b. In the **New Document Profile** drop-down list, select the required profile. You have the option of changing the original document's present document profile if its being overwritten.
  - c. The **Preserve Attachment Type** drop-down list is enabled only if you selected the **Document, Preserve Copy** option in the Conversion Output Destination field. If applicable, select the relevant type. You can select **None** if you want to opt out of using a specific attachment type from the Classification tab.
  - d. The **New Attachment Type** drop-down list is enabled only if you selected the Attachment option in the Conversion Output Destination field. If applicable, select the relevant type. This drop-down list provides those attachment types that you configured in your document profile. If your document profile doesn't include any attachment types, then those that you created on the Classifications tab in the Attachment Types section are available for you to choose from. You can select **None** if no attachment types should be considered or if none are available.
- 6. On the **Output Destination** page, in the **Attachment Destination** section (this section is enabled if you selected the **Convert Attachments** check box in the **Attachment Conversion** section):
  - a. In the **Conversion Output Destination** drop-down list, select a suitable option:

- **Attachment:** Replaces the original attachment with the conversion results. You can also change the attachment type, if desired, in the **New Attachment Type** drop-down list.
  - **Attachment, Preserve Copy:** Replaces the original attachment with the results, but allows for a copy of the original to be preserved in the Content Capture Client. You can also choose a new attachment type if you select this option. However, you must select an attachment type from the **Preserve Attachment Type** drop-down list.
- b. In the **New Attachment Type** drop-down list, select the relevant type. This drop-down list provides those attachment types that you configured in your document profile. If your document profile doesn't include any attachment types, then those that you created on the Classifications tab in the Attachment Types section are available for you to choose from. You can select **None** if no attachment types should be considered or if none are available. You have the option of changing the original attachment's present document profile if its being overwritten.
  - c. The **Preserve Attachment Type** drop-down list is enabled only if you selected the **Attachment, Preserve Copy** option in the Conversion Output Destination field. If applicable, select the relevant type. You can select **None** if you want to opt out of using a specific attachment type from the Classification tab.
7. On the **Post-Processing** page, specify what happens after document conversion processing completes, depending on its success.  
See [Configure Post-Processing and Monitoring of a Conversion Job to PDF](#).
  8. Review settings on the **Summary** page and click **Submit** to save the job.
  9. Configure how batches flow to convert documents to PDF. See [Configure Batch Flow to a Conversion Job to PDF](#).
  10. Test the conversions to PDF job you created.

## Configure Post-Processing and Monitoring of a Conversion Job to PDF

Use post-processing options of a conversion job to specify what happens after processing completes.

To configure post-processing and monitoring of a conversion job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processor** tab.
3. In the **Conversion Jobs to PDF** table, [add or edit a conversion job to PDF](#).
4. Click the **Post-Processing** page to display the processing options for successful processing (no system errors) and unsuccessful processing (one or more system errors). The next steps apply to both sections: **When there is no system error** and **When there are system errors**.
5. In the **Batch Processor** and **Batch Processor Job** fields, specify which processing step, if any, occurs after document conversion processing completes. *Only those batch processor jobs that you have defined for your procedure are available for selection. For example, if you didn't define a recognition processor job, then the recognition processor option will not be available in the Batch Processor field.* If you choose recognition processor or conversions to TIFF/PDF in the Batch Processor field, then specify the corresponding processor job.

For example, you might send batches with no system errors to the commit processor. You might specify None for batches with system errors, then change their batch status or prefix to facilitate further processing in the client.

6. In the email address field, optionally enter an address to which to send an email after processing completes successfully or fails. While configuring and testing a conversion processor job, you might set yourself to receive email notifications upon system errors, then later automatically alert an administrator of processing errors.
7. In the remaining fields, specify how to change processed batches.
  - Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix **ERR** for follow-up.
  - Change batch status or priority. For example, you might change the status of batches with system errors, then create a client profile with batch filtering set to this status to allow qualified users to manually edit and complete batches that encountered errors.
8. Click **Submit** to save the job.

## Configure Batch Flow to a Conversion Job to PDF


To run a conversion job to PDF, you must configure batches to flow to the job for processing. You do this by setting the conversions to PDF as a post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).


## Deactivate or Delete a Conversion Job to PDF

When you delete a conversion job to PDF, it no longer remains available for batches for which it is set as a post-processing step. If a job specified for post-processing is not available, an error results for the batch. You may want to change a job to offline for a time before deleting it, allowing you to resolve unexpected issues with its deletion. Online conversion jobs run when they are selected in a client profile or on the Post-Processing page of a processor job. You can temporarily stop a job (take it offline) or change a deactivated job to run again. You cannot delete batch processing jobs if they are configured as a post processing job in another batch processor.

To deactivate or delete a conversion job to PDF:



1. In the procedures pane on the left, select your procedure.


The configuration pages for the selected procedure are displayed on the right.
2. Open the **Processing** tab.
3. To deactivate a job, select it in the **Conversion Jobs to PDF** table and click .

You can also deactivate or activate a conversion job to PDF by selecting or deselecting the **Online** field on the Document Selection page.
4. Select the deactivated job in the **Conversion Jobs to PDF** table and click .
5. When prompted, click **Yes** to confirm that you want to delete this conversion job.

## Configure Conversion Jobs to TIFF

By creating conversion jobs to TIFF, you can convert non-image files to black and white, grayscale, or color files.

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Processing** tab.
3. In the **Conversion Jobs to TIFF** table, click , or to edit an existing job, click .

You can also copy a conversion job by selecting it, clicking , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

4. On the **Document Selection** page:
  - a. In the **Job Details** section, enter a name and description for the job name.
  - b. In the **Documents Conversion** section:
    - Select the **Convert Documents** check box. You can create a job that does not convert documents and only performs a merge by deselecting this check box if it's selected.
    - In **Documents to Convert**, select whether to process all non-image documents or only ones matching a specified file name filter. You can enter an asterisk (\*) as a wildcard character and separate multiple filters with a comma or semi-colon.
    - To process documents for specific document profiles, select one or more document profiles listed in the **Restrict to Document Profiles** field, or select **All** to process documents for all defined document profiles.
  - c. In the **Attachment Conversion** section:
    - Select the **Convert Attachments** check box. You can create a job that does not convert attachments and only performs a merge by deselecting this check box if it's selected.
    - In the **Attachments to Convert** field, select whether to process all non-image document attachments or only ones matching a specified file name filter. You can enter an asterisk (\*) as a wildcard character and separate multiple filters with a comma or semi-colon.
    - To process attachments for specific attachment types, select one or more attachment types listed in the **Restrict to Attachment Types** field, or select **All** to process attachments for all defined attachment types.

 **Note:**

If this **Convert Documents** and **Convert Attachments** check boxes are not selected, the **Output Format**, **PDF Conversion Engine**, and **Output Destination** pages are disabled.

5. On the **Output Format** page, in the **Output Image Format** drop-down list, select a format in which you want to convert non-image documents. The options are: Black and

White (default), Grayscale, and Color. If you select **Color**, specify an image quality in the **Image Quality** field and resolution in the **DPI** field.

Under **Image Settings**, in the **Blank Page Byte Threshold** field, enter a file size value (in bytes). Any image whose size is less than or equal to the threshold is considered a blank page and therefore deleted. Also specify a value in the **Maximum Paper Size Allowed During Conversion** field.

6. Choose a conversion engine on the **PDF Conversion Engine** page. See [Configure PDF Conversion Engine](#).
7. On the **Output Destination** page, in the **Document Destination** section (this section is enabled if you selected the **Convert Documents** check box in the **Document Conversion** section):
  - a. In the **Conversion Output Destination** drop-down list, select a suitable option:
    - **Document**: Replaces the original document with the conversion results. You can also change the document profile if desired in the **New Document Profile** drop-down list.
    - **Document, Preserve Copy**: Replaces the original document with the results, but allows for a copy of the original to be preserved as an attachment in the Content Capture Client. You can also choose a document profile if you select this option. However, you must select an attachment type from the **Preserve Attachment Type** drop-down list.
    - **Attachment**: Stores the results of the conversion as an attachment. You must select an attachment type from the **New Attachment Type** drop-down list. This drop-down list provides those attachment types that you configured in your document profile. If your document profile doesn't include any attachment types, then those that you created on the Classifications tab in the Attachment Types section are available for you to choose from.
  - b. In the **New Document Profile** drop-down list, select the required profile. You have the option of changing the original document's present document profile if its being overwritten.
  - c. The **Preserve Attachment Type** drop-down list is enabled only if you selected the **Document, Preserve Copy** option in the Conversion Output Destination field. If applicable, select the relevant type. You can select **None** if you want to opt out of using a specific attachment type from the Classification tab.
  - d. The **New Attachment Type** drop-down list is enabled only if you selected the Attachment option in the Conversion Output Destination field. This drop-down list provides those attachment types that you configured in your document profile. If your document profile doesn't include any attachment types, then those that you created on the Classifications tab in the Attachment Types section are available for you to choose from. You can select **None** if no attachment types should be considered or if none are available. If applicable, select the relevant type.
8. On the **Output Destination** page, in the **Attachment Destination** section (this section is enabled if you selected the **Convert Attachments** check box in the **Attachment Conversion** section):
  - a. In the **Conversion Output Destination** drop-down list, select a suitable option:

- **Attachment:** Replaces the original attachment with the conversion results. You can also change the attachment type, if desired, in the **New Attachment Type** drop-down list.
  - **Attachment, Preserve Copy:** Replaces the original attachment with the results, but allows for a copy of the original to be preserved in the Content Capture Client. You can also choose a new attachment type if you select this option. However, you must select an attachment type from the **Preserve Attachment Type** drop-down list.
- b. In the **New Attachment Type** drop-down list, select the relevant type. This drop-down list provides those attachment types that you configured in your document profile. If your document profile doesn't include any attachment types, then those that you created on the Classifications tab in the Attachment Types section are available for you to choose from. You can select **None** if no attachment types should be considered or if none are available. You have the option of changing the original attachment's present document profile if its being overwritten.
  - c. The **Preserve Attachment Type** drop-down list is enabled only if you selected the **Attachment, Preserve Copy** option in the Conversion Output Destination field. If applicable, select the relevant type. You can select **None** if you want to opt out of using a specific attachment type from the Classification tab.
9. Complete settings on the **Document Merge Options** page.  
See [Specify How Documents are Merged and Metadata is Assigned](#).
  10. On the **Post-Processing** page, specify what happens after conversion processing completes, depending on its success.  
See [Configure Post-Processing and Monitoring of a Conversion Job to TIFF](#).
  11. Review settings on the **Summary** page and click **Submit** to save the job.
  12. Configure how batches flow to convert documents to TIFF. See [Configure Batch Flow to a Conversion Job to TIFF](#).
  13. Test the conversion job to TIFF you created.

## Configure Blank Page Detection in a TIFF Conversion Job

You configure Content Capture to automatically detect and delete blank pages from non-images documents at the time when these documents are converted to images. To enable Content Capture to accomplish this, you need to specify a threshold file size for an image to be considered a blank page.

To configure blank page detection:

1. When you [add or edit a TIFF conversion job](#), select the Output Format page.
2. Under **Image Settings**, in the **Blank Page Byte Threshold** field, enter a file size value (in bytes) to detect a blank page. If you specify 0, then blank pages are included, not deleted.
3. Click **Submit** to save the conversion job.

## Specify How Documents are Merged and Metadata is Assigned

The TIFF conversion processor lets you specify how documents should merge in a batch during conversion processing and how metadata values are assigned when documents are

merged. The merge and metadata assignment options accommodate common document conversion scenarios.

For example, the import processor might import email messages with PDF attachments, then send them for conversion. Because the email message is common to each attached PDF document and might be important for processing or indexing each one, you would select one of the document merge options that merges a source document (email message, in this case) with all other target documents (PDF).

To specify how documents are merged and metadata is assigned:

1. [Add or edit a conversion job to TIFF](#) and select the Document Merge Options page. Use this tab to specify:
  - If and how documents should be merged in a batch.
  - If a single document is merged with all other documents, where this document should be stored.
  - Which document's metadata values should be assigned to the newly combined document.
  - If the source document's attachments should be included during merge. If yes, how.
2. Select a batch merge option:
  - **Do not merge documents:** Select this option (default) if batches are already organized into documents, or when you want to convert without merging documents. When you select this option, all other fields on the tab are disabled.
  - **Merge all documents:** Select this option to merge all documents in the batch into a single document. The first document in the batch is considered the target document and all other documents are considered source documents and appended to it.
  - **Merge first document with all other documents:** Select this option to merge the first document in the batch with all other documents. The first document is considered the source document and is added to the start or end of the target document based on your **Source Document Page Placement** setting.
  - **Merge last document with all other documents:** Select this option to merge the last document in the batch with all other documents. The last document is considered the source document and is added to the start or end of the target documents based on your **Source Document Page Placement** setting.
3. In the previous step, if you choose **Merge first document with all other documents** or **Merge last document with all other documents**, then the **Source Document Page Placement** field is enabled. Specify whether to add the source document to the start or end of the target document.
4. Select **When Non-image files exist in the batch**. You can choose:
  - **Skip the merge:** Select this option to skip the merge when a non-image document exists in the batch.
  - **Merge only image files:** Select this option when converted documents are to be merged into a single document while unconverted documents remain in place.
5. Specify how metadata values should be applied to merged documents. You can choose:



- **Apply source document's metadata values:** Select this option to apply the source document's metadata values to the target document. If each source document has metadata values, the last one processed provides the target metadata values.
- **Allow target document's metadata values to be overwritten:** Select this option so the source document's metadata values can override the target document's metadata values.

You can select all these fields simultaneously. They are deselected by default; the default behavior when merging first or last documents is to apply the target document's metadata values. The default behavior when merging all documents is to apply the first document's (target's) metadata values.

6. In the **Source Attachments** field, specify if the source document's attachments should be included. Whether all or those attachments that match document profile attachment types should be included.

If you select **Merge all documents** in the **Batch Merge Option** field, then all documents including the first document in the batch are considered to be source documents.

## Configure PDF Conversion Engine

The PDF Conversion Engine page lets you choose between Oracle Outside In and Artifex Ghostscript to convert documents.

To choose a PDF conversion engine:

1. [Add or edit a conversion job to TIFF](#) and select the PDF Conversion Engine page.
2. In the **PDF Conversion Engine** section, the default selection is **Standard: Oracle Outside In**. Alternatively, you can choose **Alternative: Artifex Ghostscript**.

### Note:

The Artifex Ghostscript conversion engine converts PDF and PS documents into TIFF. However, the documents whose format is text, Microsoft Power Point, Microsoft Word, or any other, are processed through the Oracle Outside In engine.

3. Enter one or more file name filters in the **File Name Filter(s)** field to restrict processing to certain file names. By default, this field is set to \*.\* (all files are processed).

## Configure Post-Processing and Monitoring of a Conversion Job to TIFF

Use post-processing options of a conversion job to TIFF to specify what happens after processing completes, depending on processing success.

To configure post-processing and monitoring of a conversion job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Processor** tab.
3. In the **Conversion Jobs To TIFF** table, [add or edit a conversion job to TIFF](#).

4. Click the Post-Processing page to display the processing options for successful processing (no system errors) and unsuccessful processing (one or more system errors). The next steps apply to both sections: **When there is no system error** and **When there are system errors**.
5. In the **Batch Processor** and **Batch Processor Job** fields, specify which processing step, if any, occurs after document conversion processing completes. *Only those batch processor jobs that you have defined for your procedure are available for selection. For example, if you didn't define a recognition processor job, then the recognition processor option will not be available in the Batch Processor field.* If you choose recognition processor or conversions to TIFF/PDF in the Batch Processor field, then specify the corresponding processor job.  
  
For example, you might send batches with no system errors to the commit processor. You might specify **None** for batches with system errors, then change their batch status or prefix to facilitate further processing in the client.
6. In the email address field, optionally enter an address to which success or failure notifications should be sent after processing completes. While configuring and testing a conversion processor job, you might set yourself to receive email notifications upon system errors, then later automatically alert an administrator of processing errors.
7. In the remaining fields, specify how to change processed batches.
  - Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix **ERR** for follow-up.
  - Change batch status or priority. For example, you might change the status of batches with system errors, then create a client profile with batch filtering set to this status to allow qualified users to manually edit and complete batches that encountered errors.
8. Click **Submit** to save the job.

## Configure Batch Flow to a Conversion Job to TIFF



To run a conversion job to TIFF, you must configure batches to flow to the job for processing. You do this by setting the conversion processor job as a post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). (See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).) For example, you might create an import processor job that imports email messages and their PDF attachments and then sends them to the conversion processor for converting them to images. These images are then sent to a recognition processor job for bar code recognition.

## Deactivate or Delete a Conversion Job to TIFF

When you delete a conversion job to TIFF, it no longer remains available for batches for which it is set as a post-processing step. If a job specified for post-processing is not available, an error results for the batch. You may want to change a job to offline for a time before deleting it, allowing you to resolve unexpected issues with its deletion. Online conversion jobs to TIFF run when they are selected in a client profile or on the processor job's Post-Processing page. You can temporarily stop a job (take it offline)

or change a deactivated job to run again. You cannot delete batch processing jobs if they are configured as a post processing job in another batch processor.



To deactivate or delete a conversion job:


1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Processing** tab.
3. To deactivate a job, select it in the **Conversion Jobs to TIFF** table and click .  
You can also deactivate or activate a conversion job by selecting or deselecting the **Online** field on the Document Selection page.
4. Select the deactivated job in the **Conversion Jobs to TIFF** table and click .
5. When prompted, click **Yes** to confirm that you want to delete this conversion job.

## Configure Asset Lookup Jobs

Documents that successfully complete the lookup are updated in their batch regardless of the success of other documents in the batch. The batch only progresses forward if every document in it is looked up successfully. If failed batches go to the Content Capture Client for repair, then the metadata in any document in the batch could be updated. When the batch is re-released from the Content Capture Client, the whole batch of documents is looked up again.

After you've created an asset lookup on the Metadata tab, you can configure an asset lookup job on the Processing tab to include it in the required document profiles. Your asset lookup will be available to client users only after your document profile is included in the client profile, and the client profile is included in the commit profile.

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processing** tab.
3. In the **Asset Lookup Jobs** table, click , or to edit an existing job, click .

You can also copy an asset lookup job by selecting it, clicking , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

4. On the **Document Selection** page:
  - a. In the **Document Selection** section, do the following:
    - Enter a name and description for the job name.
    - To process the asset lookup job for specific document profiles, select one or more document profiles listed in the **Restrict to Document Profiles** field, or select **All** to process documents for all defined document profiles.
  - b. In the **Lookup Execution** section, do the following and then click **Next**:
    - From the **Asset Lookup** drop-down list, select an asset lookup job.

- In the **When more than one record is found** section, choose whether the first record should be displayed to the client user or none of the records should be shown. If you choose the latter, the processing job fails. The client users will be able to see the document in the Content Capture Client if they want to.
  - Select the **Is a successful lookup required** check box, if necessary.
5. On the **Post-Processing** page, specify based on the following what happens after an asset lookup job completes:
    - No system error situations are cases in which all the criteria on the previous page were met. A successful lookup can flow to commit.
    - System errors are any cases in which the lookup fails: no records found, too many records found, and so on. For unsuccessful lookups, the batch returns to the Content Capture Client for repair.
- See [Configure Post-Processing and Monitoring of an Asset Lookup Job](#)
6. Review settings on the **Summary** page and click **Submit** to save the job.
  7. Configure how batches flow to asset lookup jobs. See [Configure Batch Flow to an Asset Lookup Job](#).
  8. Test the asset lookup job you created.

## Configure Post-Processing and Monitoring of an Asset Lookup Job

Use post-processing options of an asset lookup job to specify what happens after processing completes.

To configure post-processing and monitoring of an asset lookup job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processor** tab.
3. In the **Asset Lookup Jobs** table, [add or edit an asset lookup job](#).
4. Click the **Post-Processing** page to display the processing options for successful processing (no system errors) and unsuccessful processing (one or more system errors). The next steps apply to both sections: **When there is no system error** and **When there are system errors**.
5. In the **Batch Processor** and **Batch Processor Job** fields, specify which processing step, if any, occurs after the asset lookup job completes. *Only those batch processor jobs that you have defined for your procedure are available for selection. For example, if you didn't define a recognition processor job, then the recognition processor option will not be available in the Batch Processor field.* If you choose recognition processor or conversions to TIFF/PDF in the Batch Processor field, then specify the corresponding processor job.
6. In the email address field, optionally enter an address to which to send an email after processing completes successfully or fails. While configuring and testing an asset lookup processor job, you might set yourself to receive email notifications upon system errors, then later automatically alert an administrator of processing errors.
7. In the remaining fields, specify how to change processed batches.

- Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix **ERR** for follow-up.
  - Change batch status or priority. For example, you might change the status of batches with system errors, then create a client profile with batch filtering set to this status to allow qualified users to manually edit and complete batches that encountered errors.
8. Click **Submit** to save the job.



## Configure Batch Flow to an Asset Lookup Job

To run an asset lookup job, you must configure batches to flow to the job for processing. You do this by setting the asset lookup job as a post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).

## Deactivate or Delete an Asset Lookup Job

When you delete an asset lookup job, it no longer remains available for batches for which it is set as a post-processing step. If a job specified for post-processing is not available, an error results for the batch. You may want to change a job to offline for a time before deleting it, allowing you to resolve unexpected issues with its deletion. Online asset lookup jobs run when they are selected in a client profile or on the Post-Processing page of a processor job. You can temporarily stop a job (take it offline) or change a deactivated job to run again. You cannot delete batch processing jobs if they are configured as a post processing job in another batch processor.

To deactivate or delete an asset lookup job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Processing** tab.
3. To deactivate a job, select it in the **Asset Lookup Jobs** table and click .  
You can also deactivate or activate an asset lookup job by selecting or deselecting the **Online** field on the Document Selection page.
4. Select the deactivated job in the **Asset Lookup Jobs** table and click .
5. When prompted, click **Yes** to confirm that you want to delete this job.


## Configure XML Transformation Jobs

You can create an XML transformation job to transform an XML file into a desired output, as well as assign capture metadata fields values from the XML. You can do this by configuring the supported combinations of XSLT processor definitions and supplying your custom XSLT file. Additionally, an XPath expression can be mapped to capture metadata fields and XML elements can be extracted from the primary document based on an XPath expression. The


converted XML file can then be used by third-party applications to suit the other parties' business needs.

 **Note:**

You cannot create XML transformation jobs in Oracle Content Management Starter Edition. To use this feature, you need to upgrade to Oracle Content Management Premium Edition. For more information, see *Starter vs. Premium Edition*.

1. In the procedures pane on the left, select your procedure. The configuration pages for the selected procedure appear on the right.
2. Open the **Processing** tab.
3. In the **XML Transformation Jobs** table, click , or to edit an existing job, click



You can also copy an XML transformation job by selecting it, clicking , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

4. On the **Document Selection** page:
  - a. In the **Job Details** section:
    - Enter a name and description for the job.
    - In the **Process Actions** section, select the **Transformation** check box to enable transformation of content in to XML.
    - In the **Process Actions** section, select the **Field Mapping** check box to enable editing of the XPath Field Mapping table.
    - In the **Process Actions** section, select the **Element Extraction** check box to enable element extraction.
  - b. In the **Document Selection** section:
    - Select the **Process Documents** check box if applicable to the choices you made in the previous steps.

 **Note:**

The **Document Destination** section is enabled on the Output page only if this check box is selected.

- To process the XML transformation job for specific document profiles, select one or more document profiles listed in the **Restrict to Document Profiles** field, or select **All** to process documents for all defined document profiles.
- c. In the **Attachment Selection** section:

- i. Select the **Process Attachments** check box if applicable to the choices you made in the previous steps.


 **Note:**

The **Attachment Destination** section is enabled on the Output page only if this check box is selected.

- ii. Restrict to the required attachment types by selecting the check boxes for the available attachment types. You can also select all of them.
5. On the **Transformation Definition** page, in the **Transformation Engine** section:
    - Select compatible **XSLT Version**, **Processor**, and **Processor Version**. Either choose system defaults or choose from the available XSLT versions compatible with Xalan and Saxon-HE processors and their versions.
    - Specify an **Output File Extension** such as XML, HTML, JSON, text.

 **Note:**

If the output file extension doesn't equate to XML, the Field Mapping page is disabled.

6. In the **XML Stylesheet** section:
  - a. To perform a transformation, upload the XSLT through **XML Upload** or type in code in the box.
  - b. In the **Parameters** table, define the parameters that you included in your XSLT. To do this:
    - i. In the **Parameters** table, click .
    - ii. In the **Add XSLT Parameters** dialog, add the parameter name and assign it a value. You can add a text value or assemble a metadata value for your parameters.
    - iii. Repeat steps i and ii to define the required parameters.

 **Note:**


If you don't assign values to parameters that are defined in XSLT, or if you assign values to those parameters that do not exist in the XSLT, you won't be able to save your XML transformation job and notified of the same when you try to save the transformation job.

- c. In the **Transformation Testing** section, upload and test the transformed XML to confirm that it is generated correctly and then click **Next**. You can also preview the content in this section by clicking **Preview** on the top right side of this section.
7. On the **Output Destination** page, in the **Document Destination** section:
    - a. In the **Transformation Output Destination** drop-down list, select from the following:

- **Document:** Replaces the original document with the transformation results. You can also change the document profile if desired in the **New Document Profile** drop-down list.
  - **Document, Preserve Copy:** Preserves the original copy. You can also choose a document profile if you select this option. However, you must select an attachment type from the **Preserve Attachment Type** drop-down list.
  - **Attachment:** Stores the results of the transformation as an attachment. You must select an attachment type from the **New Attachment Type** drop-down list.
  - **Capture Field:** Stores the results of the transformation in a capture field. You must select **Text Field** from the **Capture Field** drop-down list.
- b. In the **New Document Profile** drop-down list, optionally, you can set a new document profile (or retain the current one without setting this field).
  - c. The **Preserve Attachment Type** drop-down list is enabled only if you selected the **Document, Preserve Copy** option in the Transformation Output Destination field. If applicable, select the relevant type. You can select **None** if you want to opt out of using a specific attachment type from the Classification tab.
  - d. The **New Attachment Type** drop-down list is enabled only if you selected the Attachment option in the Transformation Output Destination field. This drop-down list provides those attachment types that you configured in your document profile. If your document profile doesn't include any attachment types, then those that you created on the Classifications tab in the Attachment Types section are available for you to choose from. You can select **None** if no attachment types should be considered or if none are available. If applicable, select the relevant type.
  - e. The **Capture Field** drop-down list is enabled only if you selected the Capture Field option in the Transformation Output Destination field. If applicable, selected a field from the available options.
8. On the **Output Destination** page, in the **Attachment Destination** section (this section is enabled if you selected the **Process Attachments** check box in the **Attachment Processing** section):
    - a. In the **Transformation Output Destination** drop-down list, select from the following:
      - **New Attachment Type:** You have the option of changing the attachment type. This drop-down list provides those attachment types that you configured in your document profile. If your document profile doesn't include any attachment types, then those that you created on the Classifications tab in the Attachment Types section are available for you to choose from.
      - **Preserve Attachment Type:** You have the option of selecting the attachment type. But you must select an attachment type from the **Preserve Attachment Type** drop-down list.
      - **Capture Field:** You must select **Text Field** or **XML Field**.
    - b. The **New Attachment Type** drop-down list is enabled only if you selected the Attachment option in the Transformation Output Destination field. This drop-down list provides those attachment types that you configured in your document profile. If your document profile doesn't include any attachment



types, then those that you created on the Classifications tab in the Attachment Types section are available for you to choose from. You can select **None** if no attachment types should be considered or if none are available. If applicable, select the relevant type.

- c. The **Preserve Attachment Type** drop-down list is enabled only if you selected the **Document, Preserve Copy** option in the Transformation Output Destination field. If applicable, select the relevant type. You can select **None** if you want to opt out of using a specific attachment type from the Classification tab.
  - d. The **Capture Field** drop-down list is enabled only if you selected the Capture Field option in the Transformation Output Destination field. If applicable, selected a field from the available options.
9. On the **Field Mapping** page, define the navigation to specific elements or attributes so that users can extract their values from the XML document:
    - a. Select the **Fail Batch on Parsing Errors** check box if the parsing format that you will select in the next step must be adhered to strictly.
    - b. On the top right of the **XPath Field Mapping** table, click 
    - c. In the **Edit XPath Field Mapping** dialog:
      - i. In the **XPath Expression** field, specify the XPath expression for the selected metadata data field and select the parsing format. The XPath expression is evaluated on the output of the transformation if there is one. If a transformation is not performed, XPath expression is evaluated on the document or attachment.
      - ii. In the **Date Parsing Format** drop-down list, select the parsing format. If the capture field is a number, you will see a **Number Parsing Format** drop-down list instead. If necessary, a custom parsing format may be selected in the drop-down list.
      - iii. Click **OK**. The value that is added to the **XPath Expression** column of the **XPath Field Mapping** table is parsed to a date in the format you selected.
    - d. Click **OK**.
  10. On the **Element Extraction** page, specify the XPath expression to extract XML elements from the primary document and the XML element destination:
    - a. Optionally, select the **Fail Batch when no XML elements found** check box to cause a batch failure when no XML elements are found during element extraction.
    - b. In the **XPath Expression** field, specify the XPath expression based on which XML element(s) will be extracted from the primary document (see the code sample below). Each element will be saved to the selected destination.

```
<?xml version="1.0" encoding="utf-8" ?>
<invoice>
  <invoicenumber>INT-3343</invoicenumber>
  <invoicedate>2020-01-31</invoicedate>
  <purchaseordernumber>1949/2020</purchaseordernumber>
  <duedate>2020-02-14</duedate>
  <address type="shipto">
    <name>Road Runner</name>
    <street>1 Desert road east</street>
```

```

    <zipcode>2014</zipcode>
    <city>SW Am. desert</city>
  </address>
  <address type="billto">
    <name>Wile E. Coyote</name>
    <street>1 Desert road west</street>
    <zipcode>1949</zipcode>
    <city>SW Am. desert</city>
  </address>
  <lineitems>
    <lineitem>
      <quantity>20</quantity>
      <description>Explosive tennis balls</description>
      <unitprice>$5.00</unitprice>
      <amount>$100.00</amount>
    </lineitem>
    <lineitem>
      <quantity>100</quantity>
      <description>Earthquake pills</description>
      <unitprice>$0.50</unitprice>
      <amount>$50.00</amount>
    </lineitem>
  </lineitems>
  <subtotal>$150.00</subtotal>
  <tax>$7.50</tax>
  <total>$157.50</total>
  <terms>15 days</terms>
</invoice>

```

In the above sample:

- The `/invoice/lineitems/lineitem` XPath expression extracts all the `lineitem` elements:

```

<lineitems>
  <lineitem>
    <quantity>20</quantity>
    <description>Explosive tennis balls</description>
    <unitprice>$5.00</unitprice>
    <amount>$100.00</amount>
  </lineitem>
  <lineitem>
    <quantity>100</quantity>
    <description>Earthquake pills</description>
    <unitprice>$0.50</unitprice>
    <amount>$50.00</amount>
  </lineitem>
</lineitems>

```

- The `/invoice/lineitems/lineitem[quantity > 10]` XPath expression extracts all the `lineitem` elements if more than 10 of those items are ordered:

```

<lineitems>
  <lineitem>

```

```
<quantity>20</quantity>
<description>Explosive tennis balls</description>
<unitprice>$5.00</unitprice>
<amount>$100.00</amount>
</lineitem>
<lineitem>
  <quantity>100</quantity>
  <description>Earthquake pills</description>
  <unitprice>$0.50</unitprice>
  <amount>$50.00</amount>
</lineitem>
</lineitems>
```

- The `/invoice/address[@type = 'billto']` XPath expression extracts the billing address element:

```
<address type="billto">
  <name>Wile E. Coyote</name>
  <street>1 Desert road west</street>
  <zipcode>1949</zipcode>
  <city>SW Am. desert</city>
</address>
```

- c. In the **XML Element Destination** field, specify the destination to save the XML elements that were extracted. The options available are:
  - i. **Document** - Selecting this destination will replace the original primary document with the first XML element that matches the XPath expression and subsequent matches will create new documents in the batch with the same metadata fields and values. Optionally, you can set a new document profile in the **New Document Profile** drop-down list (or retain the current one without setting this field).
  - ii. **Document, Preserve Copy** - Select an attachment type for the copy. Selecting this destination will replace the primary document with the first XML element that matches the XPath expression and subsequent matches will create new documents in the batch with the same metadata fields and values. The original primary document will be preserved as an attachment of the selected attachment type. Optionally, you can set a new document profile in the **New Document Profile** drop-down list (or retain the current one without setting this field).
  - iii. **Attachment** - If you selected this option, select a new attachment type in the **New Attachment Type** drop-down list. This will create an attachment of the selected attachment type for every XML element that matches the XPath expression.

 **Note:**

- When one of the document options is selected, the original primary document is replaced with the first XML element. If the XPath expression yields more than one element, new documents are created and added to the batch. All the resulting documents will have the same metadata fields and values.
- If you performed transformation (using the **Transformation** page) before this element extraction step, then the transformed output is used during element extraction. If **xml** is not specified as the file extension in the **Output File Extension** field on the Transformation page, then, the **Field Mapping** and **Element Extraction** pages are disabled as XPath mapping and element extraction can only be performed on XML output. If the destination of transformation is a metadata field or a new attachment, then field mapping and element extraction will use the original document.

11. On the **Post-Processing** page, specify based on the following what happens after an XML transformation job completes:
  - No system error situations are cases in which all the criteria on the previous page were met. A successful transformation can flow to commit.
  - System errors are any cases in which the transformation fails: no records found, too many records found, and so on. For unsuccessful transformations, the batch returns to the Content Capture Client for repair.See [Configure Post-Processing and Monitoring of an XML Transformation Job](#)
12. Review settings on the **Summary** page and click **Submit** to save the job.
13. Configure how batches flow to XML transformation jobs. See [Configure Batch Flow to an XML Transformation Job](#).
14. Test the XML transformation job you created.

## Configure Post-Processing and Monitoring of an XML Transformation Job

Use post-processing options of an XML transformation job to specify what happens after processing completes.

To configure post-processing and monitoring of an XML transformation job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processor** tab.
3. In the **XML Transformation Jobs** table, [add or edit an XML transformation job](#).
4. Click the **Post-Processing** page to display the processing options for successful processing (no system errors) and unsuccessful processing (one or more system errors). The next steps apply to both sections: **When there is no system error** and **When there are system errors**.

5. In the **Batch Processor** and **Batch Processor Job** fields, specify which processing step, if any, occurs after the XML transformation job completes. *Only those batch processor jobs that you have defined for your procedure are available for selection. For example, if you didn't define a recognition processor job, then the recognition processor option will not be available in the Batch Processor field.* If you choose recognition processor or conversions to TIFF/PDF in the Batch Processor field, then specify the corresponding processor job.
6. In the email address field, optionally enter an address to which to send an email after processing completes successfully or fails. While configuring and testing an XML transformation job, you might set yourself to receive email notifications upon system errors, then later automatically alert an administrator of processing errors.
7. In the remaining fields, specify how to change processed batches.
  - Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix **ERR** for follow-up.
  - Change batch status or priority. For example, you might change the status of batches with system errors, then create a client profile with batch filtering set to this status to allow qualified users to manually edit and complete batches that encountered errors.
8. Click **Submit** to save the job.



## Configure Batch Flow to an XML Transformation Job

To run an XML transformation job, you must configure batches to flow to the job for processing. You do this by setting the XML transformation job as a post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).

## Deactivate or Delete an XML Transformation Job

When you delete an XML transformation job, it no longer remains available for batches for which it is set as a post-processing step. If a job specified for post-processing is not available, an error results for the batch. You may want to change a job to offline for a time before deleting it, allowing you to resolve unexpected issues with its deletion. Online XML transformation jobs run when they are selected in a client profile or on the Post-Processing page of a processor job. You can temporarily stop a job (take it offline) or change a deactivated job to run again. You cannot delete batch processing jobs if they are configured as a post processing job in another batch processor.

To deactivate or delete an XML transformation job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Processing** tab.
3. To deactivate a job, select it in the **XML Transformation Jobs** table and click .  
You can also deactivate or activate an XML transformation job by selecting or deselecting the **Online** field on the Document Selection page.
4. Select the deactivated job in the **XML Transformation Jobs** table and click .

5. When prompted, click **Yes** to confirm that you want to delete this job.



## Configure External Processor Jobs


You can create an external processor job to integrate existing, or new, capabilities with Content Capture. These capabilities can include types of document conversions, perhaps to Microsoft PowerPoint or other image formats. Or, the external processor could assign metadata values based on document content or sender's email address. In general, an external processor job is a means to extend the functionality of Content Capture as a document flows through a procedure.

When an external processor job is created, a process step ID is assigned to it. This ID is used by an external processor in the REST API to find the documents waiting to be processed. When a procedure is imported into Content Capture, the step IDs of jobs, including an external processor job, are changed. This change must be noted and the configuration of the external processor that uses it must be updated. If it isn't updated, the external processor will fail to communicate with Content Capture as the REST API resource will not be found.

### Note:

You cannot create external processor jobs in Oracle Content Management Starter Edition. To use this feature, you need to upgrade to Oracle Content Management Premium Edition. For more information, see [Starter vs. Premium Edition](#).

1. In the procedures pane on the left, select your procedure. The configuration pages for the selected procedure appear on the right.
2. Open the **Processing** tab.
3. In the **External Processor Jobs** table, click  , or to edit an existing job, click  .

You can also copy an external processor job by selecting it, clicking  , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

4. On the **Document Selection** page, do the following and then click **Next**:
  - Enter a name and description for the job.
  - Select the **Online** check box to enable the use of your external processor job in your procedure.
  - To process the external processor job for specific document profiles, select one or more document profiles listed in the **Restrict to Document Profiles** field, or select **All** to process documents for all defined document profiles.
  - Select the original file in the **Preserve Original as Attachment Type** drop-down list if you want to preserve it.
5. On the **External Processor** page, set the external processor definition by selecting **Custom External Processor** from the **External Processor Engine**

drop-down list, and then click **Next**. Optionally set the time until failure or accept the default value.

 **Note:**

The default connection type is Processor Pull from Capture.

6. On the **Security** page, find and select security members in the **Add Security Member** dialog and then click **Next**. Only these members can update the documents when they are in this position, or step, of the procedure. When the external processor 'releases' the document back to Content Capture, one of these users or groups must make the request.
  7. On the **Post-Processing** page, specify based on the following what happens after an external processor job completes:
    - No system error situations are cases in which all the criteria on the previous page were met. A successful transformation can flow to commit.
    - System errors are any cases in which the transformation fails: no records found, too many records found, and so on. For unsuccessful transformations, the batch returns to the Content Capture Client for repair.
- See [Configure Post-Processing and Monitoring of an External Processor Job](#)
8. Review settings on the **Summary** page and click **Submit** to save the job.
  9. Configure [how batches flow to external processor jobs](#).
  10. Test the external processor job you created.

## Configure Post-Processing and Monitoring of an External Processor Job

Use post-processing options of an external processor job to specify what happens after processing completes.

To configure post-processing and monitoring of an external processor job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processor** tab.
3. In the **External Processor Jobs** table, [add or edit an external processor job](#).
4. Click the **Post-Processing** page to display the processing options for successful processing (no system errors) and unsuccessful processing (one or more system errors). The next steps apply to both sections: **When there is no system error** and **When there are system errors**.
5. In the **Batch Processor** and **Batch Processor Job** fields, specify which processing step, if any, occurs after the external processor job completes. *Only those batch processor jobs that you have defined for your procedure are available for selection. For example, if you didn't define a recognition processor job, then the recognition processor option will not be available in the Batch Processor field.* If you choose recognition processor or conversions to TIFF/PDF in the Batch Processor field, then specify the corresponding processor job.
6. In the email address field, optionally enter an address to which to send an email after processing completes successfully or fails. While configuring and testing an external

processor job, you might set yourself to receive email notifications upon system errors, then later automatically alert an administrator of processing errors.

7. In the remaining fields, specify how to change processed batches.
  - Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix **ERR** for follow-up.
  - Change batch status or priority. For example, you might change the status of batches with system errors, then create a client profile with batch filtering set to this status to allow qualified users to manually edit and complete batches that encountered errors.
8. Click **Submit** to save the job.

## Configure Batch Flow to an External Processor Job


To run an external processor job, you must configure batches to flow to the job for processing. You do this by setting the external processor job as a post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).


## Deactivate or Delete an External Processor Job

When you delete an external processor job, it no longer remains available for batches for which it is set as a post-processing step. If a job specified for post-processing is not available, an error results for the batch. You may want to change a job to offline for a time before deleting it, allowing you to resolve unexpected issues with its deletion. Online external processor jobs run when they are selected in a client profile or on the Post-Processing page of a processor job. You can temporarily stop a job (take it offline) or change a deactivated job to run again. You cannot delete batch processing jobs if they are configured as a post processing job in another batch processor.

To deactivate or delete an external processor job:

1. In the procedures pane on the left, select your procedure.

The configuration pages for the selected procedure are displayed on the right.
2. Open the **Processing** tab.
3. To deactivate a job, select it in the **External Processor Jobs** table and click .




You can also deactivate or activate an external processor job by selecting or deselecting the **Online** field on the Document Selection page.
4. Select the deactivated job in the **External Processor Jobs** table and click .
5. When prompted, click **Yes** to confirm that you want to delete this job.

## Configure OCR Processor Jobs

With the OCR processor, you can convert image documents into PDF or text.

To configure an OCR processor job:



1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processing** tab.
3. In the **OCR Processor Jobs** table, click , or to edit an existing job, click . You can also copy an OCR processor job by selecting it, clicking , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.
4. On the **Document Selection** page:
  - a. In the **Document Selection** section, do the following:
    - Enter a name and description for the job.
    - In the **Output Format** drop-down list, select **PDF** or **Text**.
  - b. In the **Document Processing** section:
    - i. Select the **Process Documents** check box.

 **Note:**

The **Document Destination** section is enabled on the Output page only if this check box is selected.

- ii. To process the OCR processor job for specific document profiles, select one or more document profiles listed in the **Restrict to Document Profiles** field, or select **All** to process documents for all defined document profiles.
  - c. In the **Attachment Processing** section:
    - i. Select the **Process Attachments** check box if applicable to the choices you made in the previous steps.

 **Note:**

The **Attachment Destination** section is enabled on the Output page only if this check box is selected.

- ii. Restrict to the required attachment types by selecting the check boxes for the available attachment types. You can also select all of them.
5. On the **Output Destination** page, in the **Document Destination** section (this section is enabled if you selected the **Process Documents** check box in the **Document Processing** section):
  - a. In the **Transformation Output Destination** drop-down list, select a suitable option:
    - **Document:** Replaces the original document with the conversion results. You can also change the document profile if desired in the **New Document Profile** drop-down list.
    - **Document, Preserve Copy:** Preserves the original copy. You can also choose a document profile if you select this option. However, you must select an attachment type from the **Preserve Attachment Type** drop-down list.

- **Attachment:** Stores the results of the conversion as an attachment. You must select an attachment type from the **New Attachment Type** drop-down list.
  - **Capture Field:** Select a capture field to hold the text results after the OCR processing.
- b. In the **New Document Profile** drop-down list, select the required profile.
  - c. The **Preserve Attachment Type** drop-down list is enabled only if you selected the **Document, Preserve Copy** option in the Transformation Output Destination field. If applicable, select the relevant type. You can select **None** if you want to opt out of using a specific attachment type from the Classification tab.
  - d. The **New Attachment Type** drop-down list is enabled only if you selected the Attachment option in the Transformation Output Destination field. If applicable, select the relevant type. You can select **None** if no attachment types should be considered or if none are available.
  - e. The **Capture Field** drop-down list is enabled only if you selected the Capture Field option in the Transformation Output Destination field. If applicable, selected a field from the available options.
6. On the **Output Destination** page, in the **Attachment Destination** section (this section is enabled if you selected the **Process Attachments** check box in the **Attachment Processing** section):
    - a. In the **Transformation Output Destination** drop-down list, select a suitable option:
      - **Attachment:** Replaces the original attachment with the conversion results. You can also change the attachment type, if desired, in the **New Attachment Type** drop-down list.
      - **Attachment, Preserve Copy:** Preserves the original copy. You can also choose a new attachment type if you select this option. However, you must select an attachment type from the **Preserve Attachment Type** drop-down list.
    - b. In the **New Attachment Type** drop-down list, select the relevant type. This drop-down list provides those attachment types that you configured in your document profile. If your document profile doesn't include any attachment types, then those that you created on the Classifications tab in the Attachment Types section are available for you to choose from. You can select **None** if no attachment types should be considered or if none are available.
    - c. The **Preserve Attachment Type** drop-down list is enabled only if you selected the **Attachment, Preserve Copy** option in the Transformation Output Destination field. If applicable, select the relevant type. You can select **None** if you want to opt out of using a specific attachment type from the Classification tab.
    - d. The **Capture Field** drop-down list is enabled only if you selected the Capture Field option in the Transformation Output Destination field. If applicable, selected a field from the available options.
  7. On the **OCR Settings** page, select the languages to be supported by OCR.
  8. On the Post-Processing page, specify what happens after OCR conversion processing completes (depending on its success). See [Configure Post-Processing and Monitoring of an OCR Processor Job](#).

9. Review settings on the **Summary** page and click **Submit** to save the job.
10. Configure how batches flow to OCR processor jobs. See [Configure Batch Flow to an OCR Processor Job](#).

## Configure Post-Processing and Monitoring of an OCR Processor Job

Use post-processing options of an OCR processor job to specify what happens after processing completes.

To configure post-processing and monitoring of an OCR processor job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processor** tab.
3. In the **OCR Processor Jobs** table, [add or edit an OCR processor job](#).
4. Click the **Post-Processing** page to display the processing options for successful processing (no system errors) and unsuccessful processing (one or more system errors). The next steps apply to both sections: **When there is no system error** and **When there are system errors**.
5. In the **Batch Processor** and **Batch Processor Job** fields, specify which processing step, if any, occurs after OCR processing completes. *Only those batch processor jobs that you have defined for your procedure are available for selection. For example, if you didn't define a recognition processor job, then the recognition processor option will not be available in the Batch Processor field.* If you choose recognition processor or conversions to TIFF/PDF in the Batch Processor field, then specify the corresponding processor job.  
  
For example, you might send batches with no system errors to the commit processor. You might specify None for batches with system errors, then change their batch status or prefix to facilitate further processing in the client.
6. In the email address field, optionally enter an address to which to send an email after processing completes successfully or fails. While configuring and testing an OCR processor job, you might set yourself to receive email notifications upon system errors, then later automatically alert an administrator of processing errors.
7. In the remaining fields, specify how to change processed batches.
  - Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix **ERR** for follow-up.
  - Change batch status or priority. For example, you might change the status of batches with system errors, then create a client profile with batch filtering set to this status to allow qualified users to manually edit and complete batches that encountered errors.
8. Click **Submit** to save the job.



## Configure Batch Flow to an OCR Processor Job

To run an OCR processor job, you must configure batches to flow to the job for processing. You do this by setting the OCR processor job as a post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).

## Deactivate or Delete an OCR Processor Job

When you delete an OCR processor job, it no longer remains available for batches for which it is set as a post-processing step. If a job specified for post-processing is not available, an error results for the batch. You may want to change a job to offline for a time before deleting it, allowing you to resolve unexpected issues with its deletion. Online OCR processor jobs run when they are selected in a client profile or on the Post-Processing page of a processor job. You can temporarily stop a job (take it offline) or change a deactivated job to run again. You cannot delete batch processing jobs if they are configured as a post processing job in another batch processor.

To deactivate or delete an OCR processor job:



1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Processing** tab.
3. To deactivate a job, select it in the **OCR Processor Jobs** table and click .  
You can also deactivate or activate an OCR processor job by selecting or deselecting the **Online** field on the Document Selection page.
4. Select the deactivated job in the **OCR Processor Jobs** table and click .
5. When prompted, click **Yes** to confirm that you want to delete this job.


## Configure Classification Jobs

You can create classification jobs to automate detection of languages and classification of documents when the documents are received. After classification jobs are committed, asset languages are set in Oracle Content Management. The results can then be used to create appropriate custom digital assets and assign the correct language to the source asset.

### Note:

If your Oracle Content Management instance was created before mid-February 2023, you need to enable **OCI services content sharing** deployment options required for using advanced Content Capture features. For more information, see *Edit Your Oracle Content Management Instance* in *Administering Oracle Content Management*.

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processing** tab.
3. In the **Classification Jobs** table, click , or to edit an existing job, click .

You can also copy a classification job by selecting it, clicking , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

4. On the **Document Selection** page:
  - a. In the **Job Details** section:
    - Enter a name and description for the job.
    - Select the **Online** check box to make the available for processing.
    - Select **Language Detection** and **Document Classification** actions. **Actions** is a required field. One of the two actions must be selected to proceed further. However, for efficiency, it is recommended that you create a single job to automate language detection and document classification.
  - b. In the **Document Processing** section:
    - Select the **Process Documents** check box if applicable to the choices you made in the previous steps.
    - To process the classification job for specific document profiles, select one or more document profiles listed in the **Restrict to Document Profiles** field, or select **All** to process documents for all defined document profiles. Not selecting any is also equivalent to **All**.
  - c. If you selected the Document Classification action check box in the Job Details section, the **Attachment Processing** section is enabled for you:
    - i. Select the **Process Attachments** check box if applicable to the choices you made in the previous steps. This option leverages auto language detection and auto classification for attachments that are received from Content Capture Client.
    - ii. Restrict to the required attachment types by selecting the check boxes for the available attachment types. You can also select all of them.
5. If you selected the Language Detection action in the Job Details section on the Document Selection page, the **Language Detection** page is enabled for you:
  - Selecting primary language is mandatory. Select the required language from the **Primary Language** drop-down list. Primary language has the maximum weightage in the document. This is also the language that is the most prominently used in the document.
  - Set the minimum threshold by dragging the **Minimum Threshold** bar. It isn't mandatory to set the threshold as it will at least be zero. The minimum threshold ties with the primary language. The threshold indicates that if there is no language above this value, the Primary Language field remains blank.
  - Select the required languages from the **Document Language** drop-down list. A document can have multiple languages.
6. If you selected the Document Classification action in the Job Details section on the Document Selection page, the **Document Classification** page is enabled for you. On this page:
  - a. In the **Document Classification** section:
    - Define classifications types out-of-the-box by document understanding in the Document Profile Mappings section, if required.
    - Set the minimum threshold to indicate the confidence score for classification types. This score applies across all classification types. The minimum threshold

applies to the mappings. This threshold must be met and the mapped document profile is assigned.

However, this also pertains to the classification type that has the highest value. For example, document understanding may give the type of invoice with the highest value. If that is mapped and above the threshold, then the document profile is assigned. If there are no matches or the threshold isn't met, then the default document profile is used.

- b. In the **Attachment Classification** section,
  - Define classification types out-of-the-box by document understanding in the Attachment Type Mappings section, if required.
  - Set the minimum threshold to indicate the confidence score for classification types. This score applies across all classification types. The minimum threshold applies to the mappings. This threshold must be met and the mapped attachment type is assigned. However, this also pertains to the classification type that has the highest value. If there are no matches or the threshold isn't met, then the default attachment type is used.
7. On the **Post-Processing** page, specify based on the following what happens after your classification job completes:
  - No system error situations are cases in which all the criteria on the previous page were met. A successful transformation can flow to commit.
  - System errors are any cases in which the transformation fails: no records found, too many records found, and so on. For unsuccessful transformations, the batch returns to the Content Capture Client for repair.
8. Review settings on the **Summary** page and click **Submit** to save the job.
9. Configure how batches flow to your classification job. See [Configure Batch Flow to a Classification Job](#).
10. Test the classification job you created.

## Configure Post-Processing and Monitoring of a Classification Job

Use post-processing options of a classification job to specify what happens after processing completes.

To configure post-processing and monitoring of a classification job:

1. In the procedures pane on the left, select your procedure.

The configuration pages for the selected procedure appear on the right.
2. Open the **Processor** tab.
3. In the **Classification Jobs** table, [add or edit a classification job](#).
4. Click the **Post-Processing** page to display the processing options for successful processing (no system errors) and unsuccessful processing (one or more system errors). The next steps apply to both sections: **When there is no system error** and **When there are system errors**.
5. In the **Batch Processor** and **Batch Processor Job** fields, specify which processing step, if any, occurs after the classification job completes. *Only those batch processor jobs that you have defined for your procedure are available for selection. For example, if you didn't define a recognition processor job, then the*

*recognition processor option will not be available in the Batch Processor field.* If you choose recognition processor or conversions to TIFF/PDF in the Batch Processor field, then specify the corresponding processor job.

6. In the email address field, optionally enter an address to which to send an email after processing completes successfully or fails. While configuring and testing a classification job, you might set yourself to receive email notifications upon system errors, then later automatically alert an administrator of processing errors.
7. In the remaining fields, specify how to change processed batches.
  - Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix **ERR** for follow-up.
  - Change batch status or priority. For example, you might change the status of batches with system errors, then create a client profile with batch filtering set to this status to allow qualified users to manually edit and complete batches that encountered errors.
8. Click **Submit** to save the job.



## Configure Batch Flow to a Classification Job

To run a classification job, you must configure batches to flow to the job for processing. You do this by setting the classification job as a post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).

## Deactivate or Delete a Classification Job



When you delete a classification job, it no longer remains available for batches for which it is set as a post-processing step. If a job specified for post-processing is not available, an error results for the batch. You may want to change a job to offline for a time before deleting it, allowing you to resolve unexpected issues with its deletion. Online classification jobs run when they are selected in a client profile or on the Post-Processing page of a processor job. You can temporarily stop a job (take it offline) or change a deactivated job to run again. You cannot delete batch processing jobs if they are configured as a post processing job in another batch processor.


To deactivate or delete a classification job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Processing** tab.
3. To deactivate a job, select it in the **Classification Jobs** table and click .  
You can also deactivate or activate a classification job by selecting or deselecting the **Online** field on the Document Selection page.
4. Select the deactivated job in the **Classification Jobs** table and click .
5. When prompted, click **Yes** to confirm that you want to delete this job.

# Configure Taxonomy Lookup Jobs

A *taxonomy* is a hierarchy of categories, mapped to your business structure, used to organize your assets and to help users find assets by drilling down into the area they're working on. You can create taxonomy lookup jobs to enable client users to select taxonomy categories or automate taxonomy searches using a capture field value. In the later case, users can configure the category lookup for the target category reference field that you will configure in the taxonomy lookup job in your procedure.

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processing** tab.
3. In the **Taxonomy Lookup Jobs** table, click , or to edit an existing job, click .

You can also copy a taxonomy lookup job by selecting it, clicking , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

4. On the **Lookup** page, in the **Document Selection** section, do the following and then click **Next**:
  - Enter a name and description for the job.
  - Select the **Online** check box to enable the use of your taxonomy lookup job in your procedure.
  - To process the taxonomy lookup job for specific document profiles, select one or more document profiles listed in the **Restrict to Document Profiles** field, or select **All** to process documents for all defined document profiles.
5. In the **Lookup Execution** section, do the following and then click **Next**:
  - a. In **Target Category Reference Field**, select the metadata field to which you want to assign a taxonomy reference. You configured the taxonomy on the Metadata tab by [creating a new metadata field](#) whose data type is **Category Reference**. If a lookup job executes successfully, the Target Category Reference Field is assigned a GUID as the searched taxonomy category value.

 **Note:**

The Target Category Reference Field lists only Category Reference metadata fields in the drop-down list.

- b. In the **Lookup Method** drop-down list, select either **Category Search** or **Path Traverse**.
  - If you select **Category Search**:
    - In the **Comparison Operator** drop-down list, select one of the following:



- \* **Equals:** Taxonomy search value equals the value selected in Capture Search Field.

Sample Data

```
1. Pulsar 150
2. Pulsar 180
Capture Field value = Pulsar
Lookup Result = Empty
Capture Field value = Pulsar 150
Lookup Result = GUID for Pulsar 150
```

- \* **Starts With:** Taxonomy search value starts with the value selected in Capture Search Field.

Sample Data

```
1. 150 Pulsar
2. Pulsar 180
Capture Field value = Pulsar
Lookup Result = Pulsar 180
Capture Field value = Bajaj
Lookup Result = Empty
```

- \* **Contains:** Taxonomy search value contains the value selected in Capture Search Field.

Sample Data

```
1. 150 Pulsar
2. Pulsar 180
Capture Field value = Pulsar
Lookup Result = Pulsar 150 and Pulsar 180
Capture Field value = Bajaj
Lookup Result = Empty
```

- In the **Capture Search Field** drop-down list, select the metadata field whose value should be passed from the Content Capture Client or list job. Only alphanumeric values are available in this list. The value you select is searched in the taxonomy that you configured for the metadata field you selected in Target Category Reference Field. The target reference field is used to search the Capture Search Field. The taxonomy value is returned to the target reference field, and it is also mapped to the metadata field you selected as the value of the target reference field.

 **Note:**

- \* The taxonomy lookup is performed on the *name* field of the taxonomy that is selected for the target category reference in the metadata field.
- \* The result of the lookup job is the GUID Id for the searched taxonomy category and this GUID is assigned to the Target Category Reference Field.

- In the **If multiple categories match** section, choose one of the following:
    - \* **Select first:** Selects the first search result.
    - \* **Select none:** Skips all categories. If this option is selected, no searched category GUID is assigned to the target category reference field. Any existing values in this field are retained.
    - \* **Fail:** Taxonomy lookup fails. A relevant error message is displayed such as "Multiple matches were found for lookup."
  - If you select **Path Traverse:**
    - In the **Capture Path Field** drop-down list, select a metadata field of the type Path. This path is used to traverse the taxonomy. It represents various categories that need to be created or found.
    - You can create missing categories by accepting the default selection of the **Create Missing Categories** check box. If a category is created, a new taxonomy version is created, a *Draft* version, which must be promoted to be used. The **After Category Added** drop-down list provides **Promote** or **Publish** actions to be taken if categories were created. You can select the desired option. If a taxonomy has never been published previously, Content Capture cannot publish it. A message is written in the activity log indicating as such; however, the batch does not fail processing and the taxonomy is left in promoted state. See *Manage Taxonomies* for more information.
    - If you choose not to create missing categories and paths are incomplete, then in the **If incomplete traverse** section is available. The choices are **Select lowest match** or **Select none**. The lowest match refers to the deepest part of the path that presently exists in the taxonomy. Whereas, select none leaves the category reference field unassigned.
6. On the **Post-Processing** page, specify based on the following what happens after an taxonomy lookup job completes:
- No system error situations are cases in which all the criteria on the previous page were met. A successful transformation can flow to commit.
  - System errors are any cases in which the transformation fails: too many records found and so on. For unsuccessful transformations, the batch returns to the Content Capture Client for repair.
- See [Configure Post-Processing and Monitoring of a Taxonomy Lookup Job](#).
7. Review settings on the **Summary** page and click **Submit** to save the job.
8. Configure [Configure Batch Flow to a Taxonomy Lookup Job](#).
9. Test the taxonomy lookup job you created.

## Configure Post-Processing and Monitoring of a Taxonomy Lookup Job

Use post-processing options of a taxonomy lookup job to specify what happens after processing completes.

To configure post-processing and monitoring of a taxonomy lookup job:

1. In the procedures pane on the left, select your procedure.

The configuration pages for the selected procedure appear on the right.

2. Open the **Processor** tab.
3. In the **Taxonomy Lookup Jobs** table, [add or edit an taxonomy lookup job](#).
4. Click the **Post-Processing** page to display the processing options for successful processing (no system errors) and unsuccessful processing (one or more system errors). The next steps apply to both sections: **When there is no system error** and **When there are system errors**.
5. In the **Batch Processor** and **Batch Processor Job** fields, specify which processing step, if any, occurs after the taxonomy lookup job completes. *Only those batch processor jobs that you have defined for your procedure are available for selection. For example, if you didn't define a recognition processor job, then the recognition processor option will not be available in the Batch Processor field.* If you choose recognition processor or conversions to TIFF/PDF in the Batch Processor field, then specify the corresponding processor job.
6. In the email address field, optionally enter an address to which to send an email after processing completes successfully or fails. While configuring and testing a taxonomy lookup job, you might set yourself to receive email notifications upon system errors, then later automatically alert an administrator of processing errors.
7. In the remaining fields, specify how to change processed batches.
  - Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix **ERR** for follow-up.
  - Change batch status or priority. For example, you might change the status of batches with system errors, then create a client profile with batch filtering set to this status to allow qualified users to manually edit and complete batches that encountered errors.
8. Click **Submit** to save the job.

## Configure Batch Flow to a Taxonomy Lookup Job

To run a taxonomy lookup job, you must configure batches to flow to the job for processing. You do this by setting the taxonomy lookup job as a post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).



## Deactivate or Delete a Taxonomy Lookup Job

When you delete a taxonomy lookup job, it no longer remains available for batches for which it is set as a post-processing step. If a job specified for post-processing is not available, an error results for the batch. You may want to change a job to offline for a time before deleting it, allowing you to resolve unexpected issues with its deletion. Online taxonomy lookup jobs run when they are selected in a client profile or on the Post-Processing page of a processor job. You can temporarily stop a job (take it offline) or change a deactivated job to run again. You cannot delete batch processing jobs if they are configured as a post processing job in another batch processor.

To deactivate or delete a taxonomy lookup job:

1. In the procedures pane on the left, select your procedure.

The configuration pages for the selected procedure are displayed on the right.



2. Open the **Processing** tab.
3. To deactivate a job, select it in the **Taxonomy Lookup Jobs** table and click . You can also deactivate or activate a taxonomy lookup job by selecting or deselecting the **Online** field on the Document Selection page.
4. Select the deactivated job in the **Taxonomy Lookup Jobs** table and click .
5. When prompted, click **Yes** to confirm that you want to delete this job.


## Configure Conditional Assignment Jobs

The Conditional Assignment processor provides a basic conditional logic that gives you the flexibility to manipulate metadata field values and change document profiles. In your conditional assignment job, you choose an evaluation process, create actions that you apply to metadata fields or document profiles, and configure conditions in which those actions should be executed.

You can use conditional assignment jobs in various scenarios. For example, you have several content repositories, each for a specific type of content such as, proposals, assignments, and marketing presentations. You want to manage the entire content in a single repository without changing the existing repository infrastructure. You can accomplish this by creating a conditional assignment job that works with [a taxonomy lookup job](#). The taxonomy lookup job can include as many categories as there are content folders. The conditional assignment job can convert the folder names into the corresponding names of the new categories.




Another scenario is, you've imported content from WebCenter Content via an archiver file. Now you want to translate the folder names into document types. To begin with, you need to [create document profiles](#) for document types. Then you create a conditional assignment job in which you configure required actions, assign them to those document profiles, and you configure conditions for the actions to be executed.

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processing** tab.
3. In the **Conditional Assignment Jobs** table, click , or to edit an existing job, click .

You can also copy a conditional assignment job by selecting it, clicking , and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

4. On the **Document Selection** page, do the following and then click **Next**:
  - Enter a name and description for the job.
  - Select the **Online** check box to enable the use of your conditional assignment processor job in your procedure.
  - To process the conditional assignment job for specific document profiles, select one or more document profiles listed in the **Restrict to Document**

**Profiles** field, or select **All** to process documents for all defined document profiles.

- Select the original file in the **Preserve Original as Attachment Type** drop-down list if you want to preserve it.
5. On the **Actions** page:
- a. In the **Evaluation Process** drop-down list, select **Perform All** or **Stop at the first performed action**. Which of the two you should select depends upon the action you'll create in the table below. If all actions are sequentially connected, the former option may be better suited. However, if the conditions you configure in the first action are mandatory, and if they are not met, the process should stop, then you might want to choose the latter. This is one of the numerous scenarios. Your business needs determine what evaluation process you need.
  - b. In the **Actions** table, click  to create an action, or edit one by selecting it and clicking . You can delete an action by clicking .
  - c. In the **Add Action** dialog, specify a meaningful name for this action in the **Name** field.
  - d. In the **Action Type** drop-down list, select one of the items from the table below as required.

If you selected this Action Type	Then do this
Assign a Document Profile	In the <b>Document Profile</b> drop-down list, select the relevant document profile.
Assign Field	<ol style="list-style-type: none"> <li>i. In <b>Target Field</b>, select a metadata field.</li> <li>ii. In <b>Value Type</b>, select a value from the options available for the metadata field. Based on the value you select, relevant fields are displayed to make further choices.</li> </ol>
Assign Fields from Segments	<ol style="list-style-type: none"> <li>i. In <b>Target Field</b>, select from other Path and String fields.</li> <li>ii. In <b>Source Path</b>, select a Capture Path metadata field.</li> <li>iii. <b>Segments:</b> A path is composed of multiple segments or elements. For example, a path of <code>/segment-1/segment-2/segment-3/segment-4</code> has 4 segments. Enter segment numbers you want from the path value. For instance: 2,4 would produce a value of <code>/segment-2/segment-4</code>. Similarly 4,1 produce a value of <code>/segment-4/segment-1</code>.</li> </ol>

If you selected this Action Type	Then do this
Assemble Path	<p data-bbox="967 237 1461 300"><b>i.</b> In <b>Target Field</b>, select a Path or a String field.</p> <p data-bbox="967 317 1461 573"><b>ii.</b> In the <b>Path Assembly</b> field, use the <b>Compound Field Value</b> dialog to assemble a group of fields into a new path value. Select fields from the given list and then order them using the shuttle control. At run time, the values of the fields selected will be assembled into a segmented value such as <i>/value1/value2/value3</i>.</p> <p data-bbox="1015 575 1461 716">For any non-string fields included in the path, the formatting options associated with the field definition are used. See the table row for the Path data type in step 6 in <a href="#">Add or Edit a Metadata Field</a>.</p> <p data-bbox="1015 724 1266 751">Some special ones are:</p> <ul data-bbox="1015 753 1461 909" style="list-style-type: none"><li>• Content Item Reference: The content item name</li><li>• Asset Reference: The asset name</li><li>• Category Reference: The category path</li></ul>




**Note:**

If you're creating a conditional assignment job with the Assemble Path action type and adding a date metadata field into Path Assembly without defining a display format, then the conditional assignment job will default to M/d/yy. If you do not wish to have the date nested in folders, then you can override this behavior by providing another display format that best fits your needs, that is, a format that does not include the "/" and "\" characters.


If you selected this Action Type	Then do this
Expression Parsing	<ol style="list-style-type: none"> <li>i. <b>Target Field:</b> Lists all Capture metadata fields.</li> <li>ii. <b>Source Field:</b> Lists only alphanumeric Capture metadata fields.</li> <li>iii. <b>Regular Expression:</b> Specifies the regular expression which extracts the value from the selected source field and assigns it to the target field. For example, you can enter an email Id such as <code>john.doe@company.com</code> in the Value field for the regular expression to extract <code>john.doe</code> from the source field and assign it to the Name target field.</li> </ol>

e. In the **Conditions** table, add the required conditions:

- i. To add a condition, click  in the **Conditions** table. These conditions are added against the metadata fields and evaluated true or false.
- ii. In the **Add Condition** dialog, select a field, an operator for this field, and the type of comparison to be performed. If you select Capture Field as the comparison type, then select the field to be compared with. If you select Value as the comparison type, then enter a float value (regular numbers).

 **Note:**

The Matches operator is visible only when the selected field is of the type Alphanumeric. When you select the Matches operator, you must also specify a valid regular expression that can be tested.

The actions you create are displayed in the Actions table. You can sort the action evaluation order by clicking  and reordering the available actions in the **Sort Action Evaluation Order** dialog.

6. On the **Post-Processing** page, specify based on the following what happens after a conditional assignment processor job completes:
  - No system error situations are cases in which all the criteria on the previous page were met. A successful transformation can flow to commit.
  - System errors are any cases in which the transformation fails: no records found, too many records found, and so on. For unsuccessful transformations, the batch returns to the Content Capture Client for repair.

See [Configure Post-Processing and Monitoring of a Conditional Assignment Job](#)

7. On the **Summary** page, review the actions and their conditions which you configured on the **Actions** tab and then click **Submit** to save the job.
8. Configure how [batches flow to your conditional assignment job](#).
9. Test the conditional assignment job you created.

## Configure Post-Processing and Monitoring of a Conditional Assignment Job

Use post-processing options of a conditional assignment job to specify what happens after processing completes.

To configure post-processing and monitoring of a conditional assignment job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure appear on the right.
2. Open the **Processor** tab.
3. In the **Conditional Assignment Jobs** table, [add or edit a conditional assignment job](#).
4. Click the **Post-Processing** page to display the processing options for successful processing (no system errors) and unsuccessful processing (one or more system errors). The next steps apply to both sections: **When there is no system error** and **When there are system errors**.
5. In the **Batch Processor** and **Batch Processor Job** fields, specify which processing step, if any, occurs after the conditional assignment job completes. *Only those batch processor jobs that you have defined for your procedure are available for selection. For example, if you didn't define a recognition processor job, then the recognition processor option will not be available in the Batch Processor field.* If you choose recognition processor or conversions to TIFF/PDF in the Batch Processor field, then specify the corresponding processor job.
6. In the email address field, optionally enter an address to which to send an email after processing completes successfully or fails. While configuring and testing a conditional assignment job, you might set yourself to receive email notifications upon system errors, then later automatically alert an administrator of processing errors.
7. In the remaining fields, specify how to change processed batches.
  - Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix **ERR** for follow-up.
  - Change batch status or priority. For example, you might change the status of batches with system errors, then create a client profile with batch filtering set to this status to allow qualified users to manually edit and complete batches that encountered errors.
8. Click **Submit** to save the job.

## Configure Batch Flow to a Conditional Assignment Job



To run a conditional assignment job, you must configure batches to flow to the job for processing. You do this by setting the conditional assignment job as a post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).



## Deactivate or Delete a Conditional Assignment Job

When you delete a conditional assignment job, it no longer remains available for batches for which it is set as a post-processing step. If a job specified for post-processing is not available, an error results for the batch. You may want to change a job to offline for a time before deleting it, allowing you to resolve unexpected issues with its deletion. Online conditional assignment jobs run when they are selected in a client profile or on the Post-Processing page of a processor job. You can temporarily stop a job (take it offline) or change a deactivated job to run again.

To deactivate or delete a conditional assignment job:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Processing** tab.
3. To deactivate a job, select it in the **Conditional Assignment Jobs** table and click .  
You can also deactivate or activate a conditional assignment job by selecting or deselecting the **Online** field on the Document Selection page.
4. Select the deactivated job in the **Conditional Assignment Jobs** table and click .
5. When prompted, click **Yes** to confirm that you want to delete this job.

# 13

## Configure Commit Profiles

In commit profiles, you can configure these types of commit drivers: *Documents Folder*, *Asset Repository*, and *Business Repository*. You can also restrict commit to a document profile so that users can check in only those documents to the repository that meet the criteria specified in the document profile. After batches are successfully committed, they are permanently removed from the procedure.

To learn what commit processing is and how you can configure commit profiles, see:

- [About Commit Processing](#)
- [Add or Edit a Commit Profile](#)
- [Activate and Order Commit Profiles](#)
- [Deactivate or Delete a Commit Profile](#)
- [Restrict a Commit Profile Based on Document Profile](#)
- [Configure Asset or Business Repository Commit Driver Settings](#)
- [Configure Documents Folder Commit Driver Settings](#)
- [Configure Batch Flow to the Commit Processor](#)

### About Commit Processing

The content capture feature enables you to commit your documents and assets into Oracle Content Management. On the Commit tab, you create commit profiles in which you configure the Oracle Content Management commit driver settings. You can also restrict commit operations to a document profile so that users can check in only those documents to the repository that meet the criteria specified in the document profile.



#### Note:

Whenever you commit or check in a file to Oracle Content Management, a new version of your file is created in the repository. If you would prefer the file names to be unique when you commit the files, use options available on the **Document File Naming** tab of the commit profile.

#### About Documents Folder, Asset Repository, and Business Repository Commit Drivers

If your content needs to be committed as documents in Oracle Content Management, then you can make use of the *Documents Folder* commit driver. But, if your content needs to be checked in as assets of various types--asset types that are supported in Oracle Content Management and configured for your repository--use the *Asset Repository* driver instead. You can use this driver if the digital asset type is configured in your Oracle Content Management repository. So, your repository must include digital asset types while content types are optional. However, if you want to only store your content assets, without having them

considered for localization, publishing, and delivery, then choose the *Business Repository* driver.

Here is what digital asset types and content types mean in Oracle Content Management:

*Digital Asset Types:* Oracle Content Management includes several out-of-the-box digital asset types: file, image, and video. For example, an image might include EXIF information from the camera (date, time, location, resolution, and such), system settings (asset creation date, last updated, status, version, and such), and custom metadata. You might want to collect copyright, permitted use, and contact information for each of your images. Digital assets are used in different ways, in different contexts: websites, marketing materials, email campaigns, online stores, blogs. Digital assets are mostly used for content modeling and publishing—as such, they differ from "regular" documents, which are intended more for content collaboration, sharing, and syncing.

*Content Types:* A content type is a framework used for specifying what information is included in a content item. Content types can also have layouts associated with them, which determine how they appear and what information is used in that particular layout. For example, you may only want a subset of information to appear on an employee contact list, but you might want an employee picture, location, and job title appear in another location on your website. When you create a content item using a content type, you can preview how it will look with different layouts.

## About Image and Non-Image Documents

### Image Document Output Formats

- Image files can either be preserved or can be converted to TIFF or PDF formats.
- Images files that are not preserved are committed to Oracle Content Management in their new formats.
- All non-image files and preserved images are committed to the repository as they are.

### Committing of Non-Image Documents

Non-image documents are files such as Microsoft Word, Microsoft Excel, PDF, or EML documents. You can configure your commit profile to retain the native formats of non-image files. On commit, non-image documents are processed differently than image documents:

- Non-image documents remain in their native format and are not converted to TIFF or PDF format.
- Once non-image documents have been successfully committed by all online and applicable commit profiles, they are deleted from the procedure just like image documents.

### About Applying Commit Profiles During Commit Processing

Batches arriving at commit processing are ready to undergo processing by one or more commit profiles defined for the procedure. A batch may be uniform (for example, consisting of all image documents that use the same document profile) or varied (for example, consisting of image and non-image documents assigned different document profiles). Regardless, batch committing follows this general process:

1. For a batch to reach commit, the commit processor must be selected as a post-processing step in the client profile or processor job.
2. All commit profiles defined for the procedure are run on the batch, subject to the following rules:
  - a. Commit profiles run one at a time, following the order you've specified on the **Commit** tab of your procedure.
  - b. Commit profiles must be **Online**. Changing a profile to **Offline** deactivates its use in commit processing for the procedure.
  - c. A commit profile skips processing any documents whose assigned document profile does not match the document profiles assigned to the commit profile. See [Restrict a Commit Profile Based on Document Profile](#).
  - d. As Content Capture processes each document, it verifies that required metadata fields are complete. An error occurs for a document if required fields do not contain values.
  - e. If an error is encountered, commit processing may skip the document, skip the commit profile, or cancel commit processing.
3. Content Capture commits documents in the batch.
  - a. Content Capture 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.
  - b. When there are no remaining documents in the batch, Content Capture deletes the batch.

If a document fails to be committed, it remains in the batch and an error is generated.
4. When a document has been successfully committed by all applicable commit profiles, Content Capture removes the document's files and associated metadata from the batch.

### About Commit Error Handling

Use a commit profile's error handling options to specify what happens when errors are encountered during batch committing. If an error is encountered, you can:

- Skip to the next document

This option skips committing the current document and begins committing the next document in the batch.
- Skip to the next commit profile

This option stops the current commit profile from executing and begins processing the next commit profile (if specified).
- Cancel the commit

This option stops the entire commit process, including any other commit profiles, from executing.

During commit, a record is maintained that indicates if a document/attachment has been successfully committed with a commit profile. When a document/attachment is about to be committed by a commit profile, a check is performed to see if the document/attachment has already been successfully committed. If it has, the document/attachment will not be reattempted.



Regardless of error settings, all documents in which an error is encountered remain in the batch until the error is resolved and they are successfully committed.


## About Documents Remaining After Commit

If uncommitted documents remain in a batch after all commit profiles have been executed, the batch lock is cleared and the batch is put in a ready state so that it can be opened in the Content Capture Client.

# Add or Edit a Commit Profile

To add or edit a commit profile:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Commit** tab.
3. In the **Commit Profiles** table, click  or select a commit profile and click .

You can also copy a commit profile by selecting it, clicking , and entering a new name when prompted. Copying a commit profile allows you to quickly duplicate and modify it.

4. Complete settings on the General Settings page.
  - a. Enter a name in the **Commit Profile Name** field.
  - b. Ensure that the **Online** field is selected. When online, the commit profile is executed whenever a batch for the procedure is processed by the commit processor.
  - c. In the **Destination** field, select **Documents Folder**, **Asset Repository**, or **Business Repository**.
    - If your content needs to be committed as documents in Oracle Content Management, then you can select *Documents Folder*.
    - If your content needs to be checked in as assets of various types that are supported in Oracle Content Management and configured for your repository, select *Asset Repository*.
    - To only store your content assets, without having them considered for localization, publishing, and delivery, select *Business Repository*.
  - d. In the **Error Handling Policy** field, specify what happens if an error is encountered in one or more documents in the batch being committed. See *Commit Error Handling* in [About Commit Processing](#).
  - e. In the **Restrict Commit to Document Profiles** field, select one or more document profiles to restrict the commit profile to only documents assigned those document profiles. See [Restrict a Commit Profile Based on Document Profile](#).

 **Note:**

This field is available only for the **Documents Folder** destination.

- f. Select the default date format and the default locale.

- g. In the **Restricted Field Value Handling** section, choose the next action if a folder or asset name is assigned a value containing invalid characters:
  - **Remove invalid characters:** These characters are considered invalid if used in the names of documents, folders, and assets:
    - Documents and folders: / \ \* " < > | ? :
    - Assets: ; " : ? < > % { } \ / \* |
  - **Cancel commit:** Cancel the commit process.
5. On the Commit Driver Settings page, complete driver-specific settings. See [Configure Documents Folder Commit Driver Settings](#).
6. On the Post-Processing page, enter email address to which system errors should be reported.
7. On the Summary page, review the commit profile settings that you configured on the previous tabs.
8. Click **Submit** to save the commit profile.
9. Configure how batches flow to commit processing. See [Configure Batch Flow to the Commit Processor](#).
10. Activate the commit profile and specify execution order.
 

All the online commit profiles are processed in the order in which they are listed on the **Commit** tab. See [Activate and Order Commit Profiles](#).
11. Test the commit profile by committing a batch (for example, from the client). Search for and view the document in the repository or location specified in the commit profile.


## Activate and Order Commit Profiles

Commit profiles apply to all batches committed from the associated procedure. When you specify commit processor as a post-processing step in a client profile or other processor job, all online commit profiles begin processing in the order in which they are listed on the **Commit** tab. You can limit their processing in several ways:

- You can change a commit profile to *Offline*, as described below, which temporarily deactivates it.
- In the commit profile, you can restrict committing to documents assigned to one of the selected document profiles. This enables you to commit different types of documents into separate content management systems based on the document's assigned document profile. See [Restrict a Commit Profile Based on Document Profile](#).

### To activate and order commit profile processing:

1. In the procedures pane on the left, select your procedure.
 

The configuration pages for the selected procedure are displayed on the right.
2. Open the **Commit** tab.
3. To activate a commit profile, select a commit profile in the **Commit Profiles** table and click .

Active commit profiles display *Online* in the **Status** column, and inactive ones display *Offline*.

4. Use the up and down buttons to order the commit profiles as needed.



 **Note:**

Documents in which an error is encountered remain in the batch until the error is resolved and they are committed again.

## Deactivate or Delete a Commit Profile

Deleting a commit profile makes it unavailable for batches for which commit processing is set as a post-processing step. You might want to change a commit profile to offline for a time before deleting it, so you can resolve unexpected issues with its deletion.


To deactivate or delete a commit profile:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure are displayed on the right.
2. Open the **Commit** tab.
3. To deactivate a commit profile, select it in the **Commit Profiles** table and click .
4. In the **Commit Profiles** table, select the deactivated profile and click .
5. When prompted, click **Yes** to confirm that you want to delete this commit profile.

## Restrict a Commit Profile Based on Document Profile

When a batch reaches commit processing, which is the final post-processing step, the commit processor runs it through all online commit profiles as ordered on the **Commit** tab. However, you can prevent a commit profile from processing a document by restricting the commit profile to processing only documents assigned to specified document profiles.

To restrict a commit profile's execution based on document profile:

1. In the procedures pane on the left, select your procedure.  
The configuration pages for the selected procedure is displayed on the right.
2. Open the **Commit** tab.
3. In the **Commit Profiles** table, select a commit profile and click .
4. In the **Restrict Commit to Document Profiles** field on the General Settings page, select one or more document profiles to commit only those documents assigned the selected document profiles.

## Configure Asset or Business Repository Commit Driver Settings


In a content repository, your content assets become part of the workflow to which they belong and are processed accordingly. For information about how various types of assets are created and managed in Oracle Content Management, see *Manage Asset Types in Managing Assets with Oracle Content Management*. For instance, an Invoice content type can be processed through an automated workflow that first checks if the invoice meets the 'Account Payable' criteria and routes the invoice for the next action, which could be the rejection or approval of the invoice, followed by a request for correction or payment.

To configure asset repository or business repository commit driver settings:

1. [Create a commit profile](#).
2. On the General Settings page, in the **Destination** field, select one of the followings:
  - If you want to commit your content as assets, choose **Asset Repository** as the destination.
  - If you want to only store your content assets, without having them considered for localization, publishing, and delivery, then choose **Business Repository** as the destination.
3. On the Commit Driver Settings page, you select a repository and content types, as well as map assets to the content types for the repository. On the **Repository** tab:
  - a. From the **Repository** drop-down list, select the repository to which your content assets should be committed. Your selection should align with the type of repository you chose in the previous step. *Make sure you select a repository that includes one or more digital asset types.*
  - b. Select the **Not Ready for Use Assets** check box if you would like to create assets whose mandatory metadata is not yet configured in Oracle Content Management. When this option is enabled, you can map any mandatory/required field on the Assets tab via the Asset Mapping dialog for commit processing. Once you complete the required fields in Oracle Content Management, the status of these assets changes from *Not Ready* to *Draft*.

 **Note:**

The **Not Ready for Use Assets** check box is available only for those repositories that are configured to support the creation of assets whose mandatory metadata is not yet ready but can be managed later in Oracle Content Management.

- c. You can skip this step if you don't want to create a parent content item with mapped fields in your content repository. But, if you select a parent content type, the **Parent Content Item** tab is enabled for metadata mapping. From the **Parent Content Type** drop-down list, select the type that represents the content assets you will be committing.
4. On the **Assets** tab, you can map assets to custom digital asset type, auto asset type, and any other types available to you and give them names as well.
    - a. To map assets with asset types, click  on the top-right side of the **Document and Attachment Mapping to Asset Types** table.




The **Add Asset Type Mapping** dialog is displayed.

- b. From the **Capture Object** drop-down list, select the asset to which you want to assign a type.
- c. From the **Asset Type** drop-down list, select a suitable type available to you.

 **Note:**

If you created two separate document profiles (or document types) on the **Classification** tab, in the **Capture Object** type, you can select from specific document profiles or more generic document which implies any document profile. If no attachment types are defined, you can also pick a destination for attachments separately. The **All** option implies that all document and attachment types flow to this asset type. In this case the **Auto Asset Type** option means the best default (File, Image, Video) system-provided asset type. To associate specific asset types, you must delete the **All** option and add one for each document profile.


- d. In the **Asset Action** drop-down list:
  - i. Select a suitable option from the available choices: **Always create** (default), **find by search, else create**, and **find by reference, else create**.
  - ii. In the **Confirmation** dialog, click **OK**.
  - iii. If you selected **find by search, else create**:
    - In the **Search Criteria** table below **Asset Action**, map asset fields with respective capture fields, as required. To do this, click . Then in the **Search Mapping** dialog, perform the mapping by selecting the desired options in the **Asset Field** and **Capture Field** drop-down lists.

 **Note:**

The fields you select in the **Search Criteria** table are used for exact match. If any field is of the multi-value type, then the `contains` operation will be performed.

- In the **When more than one asset is found** section, select one of the following options:
  - **Version most recent**: Versions the most recently created (or updated) asset from the list.
  - **Create new**: Creates a new asset.
  - **Fail commit**: Generates an error and leaves the asset in the batch for the Content Capture Client.
- iv. If you selected, **find by reference, else create** in the **Asset Action** drop-down list, **Capture Field** is displayed below **Asset Action**. Select the required Digital Asset Reference from the drop-down list.

- v. If you selected, **find by search, else create** or **find by reference, else create** in the **Asset Action** drop-down list, the found assets are updated in the **Document and Attachment Mapping to Asset Types** table. But if no assets are found during the search, the new assets are created.
- e. The Asset Type Field Mapping dialog provides options to map capture metadata fields to asset attributes. For example, you can map a date capture value to date asset fields, a float capture value to float asset fields, multiple-value capture fields to string asset fields. You can also map asset and item reference fields if parent content

items are enabled. To map a field, select it and click  on the top-right side of the table. Then, in the **Asset Type Field Mapping** dialog, select from the available fields and click **OK**.


 **Note:**

- References between assets cannot be made at the moment of asset creation because the creation of assets is a serial sequence and thus some of the referenceable assets may not have been created yet. To solve this, the asset references are set after all of the assets have been created. Each asset with a reference is subsequently updated.
- Asset type fields of Text or Large Text can be mapped to compound values of capture metadata. The edit icon opens a different dialog that looks the same as the asset naming dialog. In this dialog, you can select multiple capture metadata fields delimited by some character(s).

Repeat these steps for each asset.

- f. In the **Category Assignments** section, taxonomies that you configured on the Metadata tab are available for selection. Select the taxonomies that would be assigned to the created asset via the reference values that have been stored. If you didn't configure any category reference fields, this section is not displayed. In the **Document and Attachment Mapping to Asset Types** table, for each selected capture object, the asset type and corresponding asset action are displayed.
5. The **Parent Content Item** tab is only enabled if you selected a parent content type on the **Repository** tab of the Commit Driver Settings page. On this tab, you can map *capture metadata* fields of the documents, which you'll be committing to an asset repository, to *parent content type* fields.

On the Commit Driver Settings page, on the **Parent Content Item** tab:

- a. In the **Item Action** drop-down list:
  - i. Select a suitable option from the available choices: **Always create** (default), **find by search, else create**, and **find by reference, else create**.
  - ii. In the **Confirmation** dialog, click **OK**.
  - iii. If you selected **find by search, else create**, the **Search Criteria** table is displayed below **Item Action**.
    - Map asset fields with respective capture fields, as required. To do this, click . Then in the **Search Mapping** dialog, perform the mapping by selecting the desired options in the **Asset Field** and **Capture Field** drop-down lists.

 **Note:**

The fields you select in the **Search Criteria** table are used for exact match. If any field is of the multi-value type, then the `contains` operation will be performed.

- In the **When more than one content item is found** section, choose one of the following options:
  - **Use most recent:** Selects the most recently created (or updated) content item from the list.
  - **Create new:** Creates a new content item.
  - **Fail commit:** Generates an error and leaves the document in the batch for the Content Capture Client.
- iv. If you selected, **find by reference, else create** in the **Item Action** drop-down list, **Capture Field** is displayed below **Item Action**. Select the required Content Item reference from the drop-down list.
- v. If you selected, **find by search, else create** or **find by reference, else create** in the **Item Action** drop-down list, the found assets are updated in the **Parent Content Type** table. But if no assets are found during the search, the new content items are created.
- b. In the **Parent Content Type** table, select a parent content type field and click

 **Note:**

Parent content type fields of Text or Large Text can be mapped to compound values of capture metadata. The edit icon opens a different dialog that looks the same as the asset naming dialog. In this dialog, you can select multiple capture metadata fields delimited by some character(s).

- c. Make required selections in the edit mapping dialog and click **OK**.  
The changes are displayed in the **Capture Source** column in the **Content Type Field Mappings** table.
  - d. In the **Category Assignments** section, taxonomies that you configured on the Metadata tab are available for selection. Select the taxonomies that would be assigned to the created content item via the reference values that have been stored. If you didn't configure any category reference fields, this section is not displayed.
6. Click **Submit**.  
Your commit driver is configured.

## Configure Documents Folder Commit Driver Settings

To configure Documents Folder commit driver settings:

1. [Create a commit profile.](#)
2. On the General Settings page, select **Documents Folder** in the **Destination** field.
3. Select the **Commit Driver Settings** page.
4. On the **Document Folder** tab, specify where to commit the documents:
  - In the **Parent Folder** section, click **Select Folder...** to display the **Select Parent Folder** dialog. In the **Select Parent Folder** section, if there is no parent folder specified for the commit profile, the user's home folder is displayed; otherwise, the selected parent folder is displayed. Select a folder to which to commit all the documents and click **OK**. The name of the selected parent folder is displayed in the **Name** field and the corresponding unique ID of the parent folder is displayed in the **ID** field. Optionally, click **Clear Folder** to clear the current selection and select a new Oracle Content Management folder.
  - Optionally, in the **Subfolder Creation** section, select **Create Subfolders using Field values** option to store document files in subfolders created dynamically within the parent folder and named using metadata field values. From the **Available Fields** list, select metadata fields to include and move them to the **Selected Fields** list. Each metadata field represents a subfolder and the order of the metadata fields represents the subfolder hierarchy.

In the **If folder name consists of invalid characters** field, specify how Content Capture should handle any invalid characters found in a subfolder name by selecting either **Remove invalid characters** option or **Cancel document commit** option.

 **Note:**

- When creating subfolders in Oracle Content Management, detection of existing folder names is case-insensitive.
- If a metadata field value used for creating a subfolder is blank, and there are subsequent non-blank subfolders, the document commit is aborted with an error message indicating that the subfolder path is invalid.
- If a metadata field value used for creating a subfolder is blank and there are no subsequent non-blank subfolders, the document is stored in the parent folder of the first blank subfolder.


See the following examples:

If metadata fields, `CustName="Corp 1",CorrespondenceType="AP",OrderNumber=NULL`, then the document is stored in `<Parent Folder>\Corp 1\AP`.

If metadata fields, `CustName="Corp 1",CorrespondenceType=NULL,OrderNumber=NULL`, then the document is stored in `<Parent Folder>\Corp 1`.

If metadata fields, `CustName=NULL,CorrespondenceType=NULL,OrderNumber=NULL`, then the document is stored in `<Parent Folder>\`.

5. On the **Document File Naming** tab, specify how document files and document attachment files should be named.

- Optionally, select **Use original file name for non-image files** field to name non-image files using their original file names.
  - Optionally, select the **Name document file based on Metadata field values** field to name the file based on one or more selected metadata field values. If this field is not selected, Content Capture names the files using the default naming scheme that includes the internal batch ID, an underscore, and a numeric identifier. From the **Available Fields** list, select metadata fields to include and move them to the **Selected Fields** list.
  - Order the metadata fields in the **Selected Fields** list. The order of the fields affects the naming of the document file.
  - In the **Field Delimiter** field, specify the field delimiter to use between metadata field values.
  - In the **If File Name Consists of Invalid Characters** field, specify how Content Capture should handle any invalid characters found in document file names by selecting either **Remove invalid characters** option or **Cancel document commit** option.
6. On the **Metadata** tab, from the **Documents Metadata Collection** drop-down list, choose a collection. Then, map **Capture** fields to **Metadata Collection** fields, making sure that the data type of mapped fields match. Select a **Metadata Collection** field and click , then select a **Capture** field to map to. Repeat this step to map additional fields.
7. On the **Options** tab, in the **Document Attachment Options** field, optionally, specify whether and how to include document attachments:
- Select the **Exclude attachments** option if you want to exclude attachments from documents when committing documents to Oracle Content Management.
  - Select the **Include in sub-folders per attachment type** option to include attachments in subfolders based on attachment type when committing documents to Oracle Content Management.

 **Note:**

For each attachment, a subfolder is created in the primary document's Oracle Content Management folder (if the subfolder does not already exist). The subfolder is named using the attachment type name of the document attachment. If the attachment does not have an attachment type name, the subfolder is named as `Attachments`.

## Configure Batch Flow to the Commit Processor

To commit batches, a client profile or batch processor job must be configured to flow to the commit processor, as described in *Applying Commit Profiles During Commit Processing* in [About Commit Processing](#). You do this by setting the commit processor as the post-processing step in a [client profile](#), an [import processor job](#), or a processing job discussed under [processing settings](#). See the post-processing information for the job or client profile from which you want to configure a batch flow, under [Configure Processing Settings](#) or [Configure Capture Settings](#).

# Part III

## Scanning and Importing Documents

You scan and import hardcopy (printed) and electronic documents using the Content Capture Client, which is the software you install on your local computer. You can download the software installer from the Oracle Content Management web interface. If you have not done so already, discuss your batch processing needs with your procedure manager who will configure your Content Capture Client environment to help you accomplish your goals efficiently and speedily. The procedure manager configures your client environment to either capture documents or index documents, or do both. Based on your job requirements, you can convert, index, and reorganize these documents. You can insert blank pages between documents. If your business requires bar code processing and your document profile is configured to support that, then any bar codes on image documents are captured automatically and associated with the business records to which they belong. Documents are also indexed based on the predefined metadata including bar code numbers to make them easily searchable in Oracle Content Management.

Here are the main tasks you do with the Content Capture Client:

- [Set Up the Content Capture Client](#)
- [Get to Know the Content Capture Client](#)
- [Understand the Content Capture Client Features](#)
- [Scan Hardcopy Documents](#)
- [Import Electronic Documents](#)
- [Review and Edit Documents](#)
- [Index Documents by Metadata](#)
- [Manage Batches](#)

# Set Up the Content Capture Client

You need the Content Capture Client if it's your job to scan and import image and non-image, electronic and physical documents into Content Capture for automated processing. You begin with downloading the client installer from the Oracle Content Management web interface to your local computer and then run the installer. To access the Content Capture Client once it's installed on your computer, you'll need the client URL, your user name, and password.

Here are the main tasks you do to set up the Content Capture Client:

- [Before You Begin](#)
- [Download the Content Capture Client](#)
- [Install the Content Capture Client](#)
- [Start the Content Capture Client](#)

## Before You Begin

You should have your login information for Oracle Content Management handy. It's in a welcome email that you received. If you don't have that or can't remember, contact your Oracle Content Management system administrator.

### System Requirements

The Content Capture Client is a Java application supported on those versions of the Microsoft Windows operating system on which JDK/JRE 8 is supported. See [Oracle JDK 8 and JRE 8 Certified System Configurations](#). The required Java libraries come packaged with the Content Capture Client.

## Download the Content Capture Client

To download the Content Capture Client:

1. Log in to the Oracle Content Management web interface.
2. From the profile menu on the top right, choose **Download Apps**.
3. On the **Download Apps** page, under **Oracle Capture for Windows**, click **Download** to download the Content Capture Client.

## Install the Content Capture Client

To install the Content Capture Client:

1. On your local computer, go to the directory in which you downloaded the Content Capture Client installer.
2. Double-click the installer file to begin the installation.

After the installation is complete, you'll see an Oracle Content Capture Client shortcut icon on your desktop. The client is also accessible from the Programs menu.

## Start the Content Capture Client

To ensure that the Content Capture Client login dialog box renders correctly, you must add Oracle Content Management and Content Capture URLs as trusted sites in Internet Explorer's Internet Options via the Trusted sites dialog box.

To start the Content Capture Client:

1. Go to the **Programs** menu, choose **Oracle** and then click **Oracle Content Capture Client**. You can also launch the client via its shortcut icon on your desktop.
2. In the **Oracle Content Capture** dialog, in the **Server** field, enter the URL of the Oracle Content Management instance you want to connect to.
3. To connect via a network proxy, select the **Connect via Network Proxy** check box. This option enables the Content Capture Client to use the system-configured proxy settings if the proxy server doesn't require authentication.
4. Click **Sign In**.
5. Enter your user name and password on the login page and then click **Sign In**.
6. In the **Open Oracle Content Capture Client?** pop-up, click **Open Oracle Content Capture Client**. If this pop-up doesn't show for you, check your browser settings. You can select the **Always allow <your client instance> to open links of this type in the associated app** check box to launch your Content Capture Client without seeking your permission in the future.

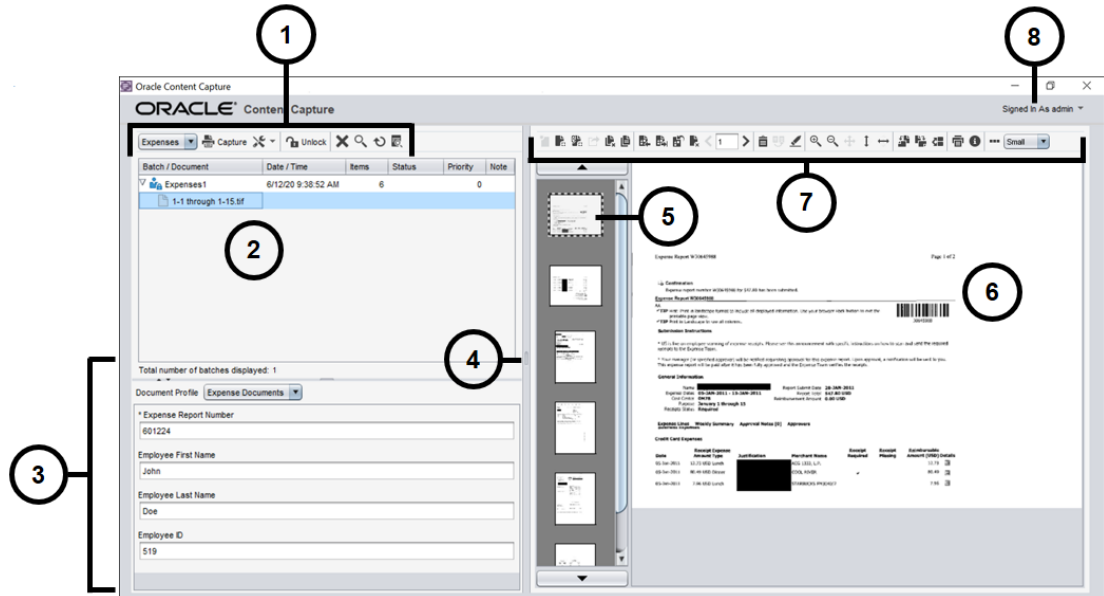
See [Get to Know the Content Capture Client](#).



# 15

## Get to Know the Content Capture Client

Your Content Capture Client is where you scan and import documents. You can also index and reorganize the documents here. Let's take a look at what the Content Capture Client looks like and what you can do.



Item	Description
1	In the <b>batch task bar</b> , you can select batches, documents, and attachments. The icons in the task bar let you perform actions such as selecting a client profile, capturing documents, changing capture settings, locking or unlocking batches, and so on. See <a href="#">Understand the Content Capture Client Features</a> for more details.
2	Shows a <b>list of batches</b> , along with the documents and attachments in them. When you select a batch in the batch pane, batch information displays in the right pane for you to view or edit.
3	Shows the <b>properties</b> of a selected document such as expense report number, employee first name and last name, and employee ID. These properties serve as metadata for document indexing to make the documents easily searchable in the Oracle Content Management repository.
4	Drag the <b>resize handler</b> left or right to increase or decrease the display size of the document you're working on.
5	Shows <b>thumbnails</b> of the pages in the selected document.
6	Shows a <b>full view</b> of the selected page in a document.

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Item	Description
7	<p>The <b>document task bar</b>, which provides a number of icons to perform these tasks:</p> <ul style="list-style-type: none"><li>• Create, view, duplicate, and delete documents</li><li>• Navigate to a specific page, insert, append, replace, and delete pages</li><li>• Copy, paste, and clear metadata values</li><li>• Change the page display and magnification level for the selected document</li><li>• Rotate the selected page</li><li>• Print the selected page</li><li>• Display file information for the selected document</li></ul> <p>See <a href="#">Understand the Content Capture Client Features</a> for more details.</p>
8	<p>This <b>user menu</b> lets you <a href="#">configure scanner preferences</a> and other client preferences, access help and software version information, and exit the application.</p>

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## Understand the Content Capture Client Features

The Content Capture Client provides a single window with three distinct work areas or panes. In these panes, you work with batches, documents, attachments, and pages.

### The Batch Pane

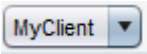
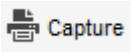




The batch pane in the upper left is fixed, while the other panes change, depending on your selection in the batch pane's tree. It lists your selection in the hierarchical list of batches and their documents.






Use the batch pane to select batches, documents, and attachments, and to perform actions on batches by clicking batch task bar icons above the tree. When you select a batch in the batch pane, batch information displays in the right pane to view or edit. For example, change the batch's status or priority, or include a note as a reminder or for others to view. The lock information displays below the batch information.



#### Note:

Press **F1** to access Help topics on the Content Capture Client.

Task	Batch Pane Icon	Shortcut
Select a profile to apply its settings when scanning or importing batches. A <a href="#">client profile</a> must always be selected when creating, updating, or releasing batches.		
Begin <a href="#">scanning or importing</a> documents.		F9
Change <a href="#">capture settings</a> : <ul style="list-style-type: none"><li>Click its left side (Capture Settings) to change settings for the selected scanner or for the import source.</li><li>Click the triangle on its right side (Capture Source) to select a scanner or the import source as the capture source.</li></ul>		Ctrl+S (Settings) Ctrl+Alt+S (Source)
Unlock one or more selected batches to synchronize their data with Oracle Content Management. <a href="#">Release a batch</a> after choosing a release process. Either <b>Unlock</b> or <b>Release</b> will be visible to you. To switch between <b>Unlock</b> and <b>Release</b> , click the triangle next to one of these icons.	 	F10 (Unlock/Release) Ctrl+Alt+R (Select a Release Process)
Permanently remove one or more selected batches, including their documents and metadata.		





Task	Batch Pane Icon	Shortcut
Specify search criteria for batches and <a href="#">filter the batch list</a> . You can search based on batch name, creation date, status, priority, or processing state.		F7
Perform asset lookup on a field.		Ctrl + L
Reload the list of batches to reflect recent batch changes.		F5
<a href="#">Find a document</a> within a batch where a displayed metadata field matches the criteria in the <b>Find</b> field.		Ctrl+F
Find the previous or next document within a batch where a displayed metadata field matches the criteria in the <b>Find</b> field.		Shift+F3 F3













### The Document Pane












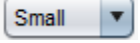
When you select a document or its attachment in the batch pane, all documents and their thumbnail images display in the document pane on the right side, and document options are available in the top toolbar. Use the document pane to review and edit selected documents. It displays details of the documents in the batch, including a scrollable thumbnail view of document pages:

- The selected thumbnail page also displays as an adjacent full page view, allowing you to carefully review pages and further magnify them if needed. A dotted outline indicates the selected thumbnail.
- A light-colored bar between pages identifies the end of one document and the start of the next.
- You can drag and drop thumbnails from image documents to move pages within or between documents. But, you cannot move pages contained in non-image documents.
- The tooltip on the thumbnail displays the page number for each page in a document.

Toolbar icons along the top of the pane allow you to make changes to documents or their pages. Note that a document must be selected to use keyboard shortcuts.

Task	Document Pane Icon	Shortcut
<a href="#">Capture a new document</a> to a batch.		
<a href="#">Split a document</a> using the current page and all pages below it, until the next document.		Ctrl+E
<a href="#">Remove or delete the selected document</a> . <ul style="list-style-type: none"> <li>• Remove the selected document, adding its pages to the end of the previous document. (If the selected document is the first document in the batch, only an option to delete the document displays.) Note that removing a document also removes its metadata values.</li> <li>• Delete the selected document, including all of its pages, from the batch.</li> </ul>		Ctrl+Alt+D
<a href="#">Capture a new attachment</a> to a document.		

Task	Document Pane Icon	Shortcut
<a href="#">Split an attachment</a> using the current page and all pages below it. This icon is available when page 2 or greater is selected in a document attachment.		Ctrl+E
<a href="#">Delete the selected attachment</a> and its pages from the batch.		Ctrl+Alt+D
<a href="#">Duplicate the selected document</a> , page, or pages.		Ctrl+U
<a href="#">Go to a specific page</a> in the current document.		<ul style="list-style-type: none"> <li>• Ctrl+G (for the text field)</li> <li>• Ctrl+P (go to the previous page)</li> <li>• Ctrl+N (go to the next page)</li> </ul>
Go to the previous or next document.		<ul style="list-style-type: none"> <li>• CTRL+ALT+P (go to the previous document)</li> <li>• CTRL+ALT+N (go to the next document )</li> </ul>
<a href="#">Insert pages before the selected page.</a>		
<ul style="list-style-type: none"> <li>• If scanning, prompts you to scan one page or all pages in the feeder.</li> <li>• If importing, prompts you to specify files to import.</li> </ul>		
Previous or next document action		Ctrl+P and Ctrl+N
<a href="#">Scan or import</a> pages to add to the batch (append pages).		Ctrl+Alt+A
<ul style="list-style-type: none"> <li>• If scanning, prompts you to scan one page or all pages in the feeder.</li> <li>• If importing, prompts you to specify files to import.</li> </ul>		
<a href="#">Delete the selected page</a> or all the pages (including the selected page and the linked pages) and replace the page(s) with the page you scan or import. Or, delete one or more selected pages.	 	Ctrl+D to delete one or more pages
<a href="#">View a non-image document/attachment</a> in its native application.		
<a href="#">Copy metadata values</a> from the selected document.		Ctrl+Shift+C
<a href="#">Paste metadata values</a> copied from another document into the current document.		Ctrl+Shift+V
<ul style="list-style-type: none"> <li>• Copying/pasting of metadata values is allowed only if the documents belong to the same batch.</li> <li>• Paste is supported only for a document whose document profile matches that of the source document.</li> <li>• You can paste the copied values into multiple documents.</li> <li>• You copy metadata values of a document into another document if both have the default document profile.</li> </ul>		
<a href="#">Clear the metadata values</a> for the selected document.		Ctrl+Shift+D

Task	Document Pane Icon	Shortcut
<a href="#">Increase and decrease</a> the magnification level. Click repeatedly to further zoom in and zoom out.	 	Ctrl+I Ctrl+O
<a href="#">Change the page display</a> so that the entire page fits in the window.		Ctrl+W
<a href="#">Change the page display</a> so that the entire height or width fits in the window.	 	
<a href="#">Rotate the selected page</a> to the left or right 90 degrees. The page is saved as last rotated (applies to images only).	 	Ctrl+R to rotate right
<a href="#">Rotate the selected page</a> upside down 180 degrees. The page is saved as last rotated (applies to images only).		
<a href="#">Print the selected page</a> to the selected printer.		
<a href="#">Display file information</a> for the selected document.		
<a href="#">Switch the thumbnail display</a> between a vertical and horizontal orientation.		
<a href="#">Display thumbnails</a> using a small, medium, or large view.		

### The Metadata Pane

The lower left pane, the metadata pane, displays metadata fields for indexing documents. Use the metadata pane to index documents by completing their metadata values.

- The metadata pane displays when the selected client profile includes indexing and a document is selected in either the batch or document pane.
- Values you enter in the metadata fields apply to all pages in the selected document. To ensure standard input, metadata fields may use input masks or special formatting, numeric or date fields or choice lists. An asterisk indicates a required metadata field.
- Metadata fields are constrained by their definition in the corresponding Capture procedure. For instance, numeric fields may be defined to have a minimum and/or maximum value, or text fields may have a maximum length. Additionally, metadata fields of type Path will be normalized, and the selected invalid character handler will be applied. For example, the value of `C:\Sample\mylab\capture` will be normalized to become: `/Sample/mylab/capture`. The normalization takes into consideration the invalid character handling approach selected when the metadata field was created. This includes blanking the value, replacing invalid characters with ' \_ ', or removing invalid characters from the value.
- Use the **Document Profile** field to identify the set of metadata fields to complete for the selected document.

For example, a batch of customer documents might contain correspondence and customer agreement document profiles. While indexing, you would select a *Correspondence* document profile each time you encounter a correspondence

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document and complete its fields, then select the *Customer Agreement* document profile each time you encounter an agreement document.

- Use the **Document Language** drop-down list to choose a language which Capture will use to collect and set the language values when creating new Items and Assets in Oracle Content Management.
- To move between metadata fields using keyboard shortcuts, press **Tab** to move to the next metadata field, and **Shift-Tab** to move to the previous metadata field.
- Use the **Attachment Type** field to change the attachment type for a selected attachment. This field is not available for capture-only profiles.

### The Batch Information Pane

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

You can view the lock information for a batch below the batch information pane. Click **Get Information** to view the name of the user who has locked the batch and the workstation name.

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## Scan Hardcopy Documents

In the Content Capture Client, you scan paper documents using a TWAIN-compliant device, or you import electronic files. You set your scan and import requirements in the client profile.

The Content Capture Client accommodates image and non-image documents. When you scan documents, it creates multiple page image documents. In the document pane, you can view and edit each page individually (for example, move and rotate pages). You can also verify where one document ends and the next begins. The selected client profile determines how documents are created and separated within a batch. You are prompted to either select a document creation option or allow Content Capture to automatically create one.

Here are the main tasks you do when scanning documents for processing with the Content Capture Client:

- [Set Up Scanner](#)
- [Configure Scanning Preferences](#)
- [Scan Documents](#)

### Set Up Scanner

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

To set up scanner:

1. Determine the client profile to use. If needed, ask your procedure manager which client profile to use for batches to scan, based on their structure. You should know how the client profile creates documents within batches.
2. Organize documents into batches for scanning, inserting separator sheets between documents if needed. For example, organize single-sided documents into a batch for use with a simplex client profile.
3. To scan, you must have a TWAIN-compliant scanner available to your system. Click the right side of **Capture Settings/Source** in the batch pane (Ctrl+Alt+S).

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

4. If you have multiple scanner sources listed, select one to use. To import rather than scan, select **Import Source**.
5. Because capture settings are saved with the client profile, you can configure different scanner settings for each client profile. Note that you can set additional scanner options under **Preferences**.
  - a. If needed, select the scanner source to which you want to apply settings. Press **Ctrl+Alt+S** and choose a scanner.
  - b. Click the left side of **Capture Settings/Source** in the batch pane (Ctrl+S).



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

## Configure Scanning Preferences

In addition to scanner settings you configure using Capture Settings/Source, you can set additional scanning options under Preferences settings.

To configure scanning preferences:

1. Click the drop-down list arrow in the upper right corner of the window and select **Preferences**.
2. In the **Preferences** dialog, optionally select the **Prompt user to continue scanning into current batch** field.

When selected, a message displays after the initial scan to check if you want to continue scanning into the current batch. This option allows you to pause to insert more paper into the automatic document feeder. It is also useful when scanning pages one at a time into a batch.

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

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

4. In the **Logging** section, select each option from the **Logging Level** drop-down list one-by-one and confirm that the details are appropriate in the log files. Each logging level option provides appropriate amount of details for the actions that take place in the Content Capture Client. Log files are written to the client's local user home directory.

Option	Description
<b>Severe</b>	Indicates a serious failure.
<b>Warning</b>	Indicates a potential problem.
<b>Info</b>	Used for logging information messages.
<b>Config</b>	Used for logging static configuration messages.
<b>Fine</b>	Provides tracing information.
<b>Finest</b>	Tracing messages are moderately detailed.
<b>Finest</b>	Tracing messages are highly detailed.
<b>Off</b>	Turns off logging.
<b>All</b>	All messages are logged.

5. Optionally deselect the **Auto Review/Index batch after scanning** field to display the properties in the right pane.
6. In the **Minimum number of bytes scanned before deleting a page** field, optionally specify how blank pages should be detected and deleted.



In this field, set the number of bytes below which a page is considered blank and deleted. If this value is 0, the value configured in the client profile is used for blank page detection.




7. Click **Save**.

## Scan Documents

Before you begin scanning, make sure that the appropriate client profile is selected in the Content Capture application and that scanner is ready with the required settings and papers in the feeder tray.

To scan documents:

1. Do one of the following:
  - a. To scan documents using a scanner, select a client profile and then click  **Capture** in the batch pane of the Content Capture Client window.
  - b. To scan using a business application, in the application, click the provided icon or button to capture documents. Depending on client profile settings, Content Capture may immediately begin scanning, or you may be prompted to select files to import or begin scanning.
  - c. To scan batches with documents divided by separator pages, insert blank sheets between documents, and click  **Capture**. The profile must be set to either prompt you to choose a document creation option or to create documents with a variable number of pages.
2. Depending on client profile settings, the Document Creation Options dialog may display after you click **Capture**, prompting you to specify how to create documents.
  - a. Specify the contents of each document in the batch. You can choose:
    - **One Page** (Simplex): Select this option if all documents are single-sided.
    - **Two Pages** (Duplex): Select this option if all documents are double-sided.
    - **Variable Number of Pages**: Select this option if you are using separator sheets to define documents or if documents are neither all single-sided or all double-sided documents.
  - b. Click **OK**.

A batch is scanned and created based on the document creation option you chose. If you chose **Variable Number of Pages** but did not insert separator sheets, a single document is created. Use  in the document pane to create document separations in the batch.
3. Review, edit, and index documents as needed. Metadata fields may already contain values.
4. To capture additional batches, click  **Capture** in the batch pane.
5. Release batches by selecting one or more batches in the **Batch** pane and clicking . Alternatively, you can right-click one or more batches in the **Batch** pane, select **Release Batch**, and then select one of the [release process options](#) configured for you. These options are also available if you select one or more documents in a batch in the Batch pane.

# Import Electronic Documents

You can import image documents, such as multiple page TIFF files, and non-image documents, such as Microsoft Word files, if allowed by the client profile.

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

- Converts the file to a multiple page image document, as if you had scanned it. In the document pane, a thumbnail is displayed for each image. You can select and edit individual pages (for example, move and rotate pages).
- Imports the file and retains it in its native format. In the document pane, a thumbnail is displayed for each non-image page, up to a maximum number set in the client profile. You can index the document, but cannot edit its pages.
- Prevents the file from being imported and displays an error message. If you select multiple non-image files for import and specify that one document is to be created for all import files, the Content Capture Client displays an error message indicating that the selection is invalid.

Each time you import, specify how documents should be created in the batch if multiple files are selected. That is, create one document for all import files or per import file. Multiple non-image files cannot be imported into one document.



## Note:

You can also set up automatic capture of electronic documents from monitored file folders or email account. For information, see [Set Up the File Import Agent](#).

Here are the main tasks you do when importing documents to the Content Capture Client:

1. [Set Up Import Source and Import Settings](#)
2. [Import Documents](#)

## Set Up Import Source and Import Settings

To specify importing as the capture source:

1. In the batch pane, click the right side of **Capture Settings/Source**, select **Import Source**, and then click **Capture** to begin importing files.
2. In the **Import Directory** field, specify a location from which the files should be selected for import.
3. To import files of a specific type, select the type in the **File Type** field.
4. In the **Rotation Settings** field, select a rotation degree (**0**, **90**, **180**, or **270**). Content Capture rotates images during import as specified.



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



## Import Documents

You can import image files (such as multi-page TIFFs) or non-image files (such as Microsoft Word or PDF files) into Content Capture. When importing non-image files, the selected client profile determines if the files should be converted in to image format, if they should be imported in their native format, or prevented from being imported.

Make sure the desired client profile is selected in the Content Capture Client.

To import documents:

1. Do one of the following, as required:
  - a. In the Content Capture Client, if needed, click the right side of  and select **Import Source** to specify importing rather than scanning and click  **Capture**.
  - b. In a business application, click **Import** on a business record page.
2. In the **Import** dialog, specify how to create documents (one document from multiple files or one document per file), and click **OK**.
3. In the **Select files to import** dialog, select one or more files to import and click **OK**.

A new batch containing the imported files is selected in the batch pane.
4. Review, edit, and index documents as needed. Metadata fields may already contain values.
5. To capture more batches, click  **Capture** in the batch pane.
6. Release batches by selecting one or more batches in the batch pane and clicking .

# 19

## Review and Edit Documents

Whether you are working with documents at a production level or small batch level, most likely you will need to review, adjust, and reorganize them. The documents task bar in the Content Capture Client provides you with the functionality to review and update documents before you release them for indexing, further processing, or committing to the Oracle Content Management repository.

Here is what you can do when you are reviewing and editing documents:

- Create, view, duplicate, and delete documents.
- Navigate to a specific page, insert, append, replace, and delete pages.
- Copy, paste, and clear metadata values.
- Increase and decrease the magnification level.
- Change the page display, entire height and entire width, to fit in the window.
- Rotate an image to the left and right 90 degrees.
- Rotate the selected page upside down 180 degrees.
- Print the selected page to the selected printer.
- Display file information for the selected document.

For step-by-step information, see:

- [Review Documents and Pages](#)
- [Edit Documents and Pages](#)
- [Create and Remove Documents](#)
- [Create and Remove Attachments](#)
- [Add, Replace, and Delete Pages](#)

## Review Documents and Pages

You can review and index documents after capturing them. When you are working on documents, you need to zoom in or zoom out to see contents, resize or reposition thumbnail display to see more thumbnails, go to a specific page or print it, find a document, view a document's attachment, and so on. The documents task bar provides icons to help you quickly perform these actions.

- [Disable Auto-Review and Indexing of Documents](#)
- [Zoom In and Out of the Selected Page](#)
- [Resize or Reposition the Thumbnail Display](#)
- [Go to a Specific Page](#)
- [Print a Page](#)
- [View a Document or an Attachment in an Associated Application](#)

- [View File Information](#)
- [Find a Document](#)







## Disable Auto-Review and Indexing of Documents






After you scan or import a batch, the document pane is displayed by default. It shows the first page in the first document of the batch selected. You can set a preference to instead display the properties in the right pane. You can do this by disabling the auto-review and indexing of documents.

To disable auto-review and indexing of documents:

1. Click the drop-down list arrow in the upper right corner of the Content Capture Client window and select **Preferences**.  
The Preferences dialog is displayed.
2. Deselect the **Auto Review/Index batch after scanning** field.

## Zoom In and Out of the Selected Page

Use , , , ,  to enlarge or reduce the image in the viewer to examine image quality. These settings are not saved with the batch. When you open a batch, its images are always displayed in the  size.

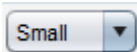

- In the document pane, click  to enlarge the image. Click  to reduce the image.
- Another way to zoom is to click and drag a rectangular area on the image using the left mouse button (rubberband zooming).
- Click  to change the page display so that the entire height fits in the window.
- Click  to change the page display so that the entire width fits in the window.
- At any point, click  to display the entire image in the viewer.

## Resize or Reposition the Thumbnail Display

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

After you resize or reposition the thumbnail display, the new settings are saved for subsequent sessions.

To resize or reposition the thumbnail display:

1. In the document pane, click  in the toolbar.
2. Select **Small**, **Medium**, or **Large**, and the thumbnail size changes to reflect your new selection.
3. Click  to switch the display to horizontal or vertical thumbnails, if desired.

## Go to a Specific Page



Use the  text box (or the keyboard shortcut Ctrl+G) to go to specific pages.

- In the document pane, enter a page number in the **Go to Page** text box to go to a specific page in the current document. You can also use the keyboard shortcut (Ctrl+G) to bring the focus on to the **Go to Page** text box from anywhere within the client application.


### Tip:

To view the page number of a page, hover the cursor over a page thumbnail and view the tooltip. The tooltip displays the page number of that specific page.

- Click < (or use the keyboard shortcut Ctrl+P) to go to the previous page in the current document.
- Click the > (or use the keyboard shortcut Ctrl+N) to go to the next page in the current document.


## Print a Page

To print a scanned or imported page:

1. In the **Document** pane, select the page to be printed by selecting its thumbnail. You can print multiple pages of image documents by selecting their thumbnails.
2. Click .
3. In the **Print** dialog, select the printer and configure settings as needed. The page is printed.

## View a Document or an Attachment in an Associated Application

To view a non-image document or a non-image attachment in an associated application, you can either:

- Right click a document or an attachment and select **View document in associated application** from the context menu.
- Select the document or attachment in the batch pane and click  from the document pane toolbar.

## View File Information


Select the document or attachment in the batch pane and click  from the document pane toolbar to view information about a document or attachment. For image documents or image attachments, select a page in the document pane to display information about the page. The File Information page is displayed listing the following details about the file or page:

Table 19-1 File Information


Property	Description
<b>System Identification</b>	<p>The attributes listed under this group are:</p> <ul style="list-style-type: none"> <li>• <b>Procedure</b></li> <li>• <b>Procedure ID</b></li> <li>• <b>Batch Name</b></li> <li>• <b>Batch ID</b></li> <li>• <b>Document ID</b></li> <li>• <b>Attachment ID</b></li> <li>• <b>Item ID</b></li> </ul> <p><b>Note:</b> The <b>Document ID</b> attribute is displayed only for documents and the <b>Attachment ID</b> attribute is displayed only for attachments.</p>
<b>File</b>	<p>The attributes listed under this group are:</p> <ul style="list-style-type: none"> <li>• <b>System File Type</b></li> <li>• <b>File Name</b></li> <li>• <b>Original File Name</b></li> <li>• <b>File Location</b></li> <li>• <b>Size</b></li> <li>• <b>Date modified</b></li> </ul> <p><b>Note:</b> The <b>Original File Name</b> attribute is displayed only for non-image files.</p>
<b>Image</b>	<p>The attributes listed under this group are:</p> <ul style="list-style-type: none"> <li>• <b>Format</b></li> <li>• <b>Author</b></li> <li>• <b>Compression</b></li> <li>• <b>Color bit depth</b></li> <li>• <b>Width</b></li> <li>• <b>Height</b></li> <li>• <b>Resolution - Horizontal</b></li> <li>• <b>Resolution - Vertical</b></li> <li>• <b>Photometric Interpretation</b></li> <li>• <b>Bits per sample</b></li> <li>• <b>Endorsement</b></li> <li>• <b>Bar codes</b></li> <li>• <b>MICR</b></li> <li>• <b>Patch code</b></li> </ul> <p><b>Note:</b> The <b>Image</b> property group is displayed only for image files. The following attributes are displayed only for TIFF images: <b>Author</b>, <b>Photometric Interpretation</b>, and <b>Bits per sample</b>. The <b>Endorsement</b>, <b>Bar codes</b>, <b>MICR</b>, and <b>Patch code</b> attributes are displayed only if they contain values.</p>
<b>Tiff Tags</b>	Displays tag numbers and tag values. This property is displayed only for TIFF image files.

Click **Copy to Clipboard** in the File Information window to copy the entire set of file attributes to the Windows clipboard.



## Find a Document

To find a document within a batch where a displayed metadata field matches the criteria in the **Find** field:

1. You can either select the document in the batch pane and click  from the batch pane toolbar or right click the document and select **Find Document** from the context menu. A horizontal toolbar with the **Find Document** options is displayed in the batch pane above the metadata pane.
2. Enter a value that you want to search in the **Find** field. The search is case-sensitive.
3. In the **Options** drop-down list select one of the following options:
  - **Blank Required Fields**: To find blank fields that are mandatory to fill.
  - **Use wildcards**: To specify wildcard characters in the **Find** field. Use ? as a wildcard to match any single character. Use \* as a wildcard to match zero, one, or more characters.
4. To start the search, either press the ENTER key in the **Find** field or click **Find Next** or **Find Previous**. The search starts at the next metadata field after the current metadata field.
5. The document on which the search value is found is displayed. If no documents are found, the message **No documents found** is displayed.

You can optionally continue to search by clicking the **Find Previous** or **Find Next** icons. Click the **Close Find Toolbar** icon to close the **Find** toolbar.

## Edit Documents and Pages

You can improve the quality of an image after scanning or importing it. Moreover, you can reorganize a document by moving, duplicating, or cutting/pasting pages. You can also rotate and flip pages in a document. In some cases where you combine different documents, you might want to copy metadata of one document to another or you might want to clear metadata of some documents.


The documents task bar provides features to let you perform these tasks:

- [Increase an Image's Quality](#)
- [Move a Page to Another Document](#)
- [Duplicate One or More Pages of a Document](#)
- [Rotate or Flip Pages](#)
- [Copy and Paste Metadata Values](#)
- [Clear Metadata Values for a Document](#)
- [Cut or Copy Pages and Paste Them in Image Documents](#)

### Increase an Image's Quality

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

To increase the quality of an image:

1. Make sure the scanner is operating optimally as described in its documentation (for example, ensure that the glass is clean).
2. In the batch pane, click the left side of  and adjust the available scanner settings (for example, adjust brightness and contrast for scanning). Note that a client profile may restrict you from changing some scanner settings such as DPI resolution and color.
3. If needed, contact your procedure manager to request that scanner settings such as DPI or brightness and contrast be adjusted for the client profile.


## Move a Page to Another Document

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

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

## Duplicate One or More Pages of a Document

To duplicate one or more pages of a document to a new document:

1. Select one or more pages of an image document and either click  from the document pane's toolbar or right click the document and select **Duplicate** from the context menu.

The Duplicate dialog is displayed.

2. Select the **Selected Pages** option.
3. Specify the number of copies to be created in the **Number of Copies** field. The default value is 1 and the maximum value is 10.
4. Select the **Keep Metadata Values** field if you want the duplicated document(s) to have the same document profile and metadata values as that of the source document.
5. Click **OK**.

The duplicated document(s) that are newly created using the selected pages are inserted immediately after the source document in the batch/document list tree.




## Rotate or Flip Pages

To rotate or flip pages:

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

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



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

- Click  to rotate images 90 degrees counterclockwise.
- Click  to rotate images 90 degrees clockwise.
- Click  to rotate images by 180 degrees.


## Copy and Paste Metadata Values

You can copy metadata values from a document and paste them into another document (within the same batch) with a matching document profile.

To copy and paste metadata values:

1. Select a document (from a batch) from which you want to copy the metadata values.
2. Click  on the document pane toolbar or use the keyboard shortcut (Ctrl+Shift+C). The metadata values are copied.
3. Select a target document (within the same batch) with a matching document profile to which you want to paste the copied metadata values.
4. Click  on the document pane toolbar or use the keyboard shortcut (Ctrl+Shift+V). The copied metadata values are pasted.


### Note:

- You can copy and paste metadata values only if the documents belong to the same batch.
- You can paste metadata values into a document only if its document profile matches with the document profile of the source document (from which metadata values were copied) or if the target document (to which metadata values are being copied to) uses the **Default** document profile. The  icon and keyboard shortcut (Ctrl+Shift+V) are enabled only when the paste action is supported.
- You can paste the copied values into multiple documents.
- If you copy metadata values from a document with the **Default** document profile, then you can paste the copied values only into a document with the **Default** document profile.

## Clear Metadata Values for a Document

You can clear the metadata values in a document using the **Clear Metadata Values** icon or the keyboard shortcut (Ctrl+Shift+D).

To clear the metadata values in a document:

1. Select a document from a batch.
2. Click  on the document pane toolbar or use the keyboard shortcut (Ctrl+Shift+D). In the **Clear Metadata Values** dialog, confirm by clicking **Yes**. All the metadata values of the selected document are cleared.

 **Note:**

This option is useful when you want to reset all metadata values and enter new values for all fields.

## Cut or Copy Pages and Paste Them in Image Documents

You can cut or copy pages and paste them within the same image document or into an image document that belongs to the same batch.

To cut or copy and paste pages:

1. In the **Document** pane, select a document and then select one or more page thumbnails to cut/copy.

 **Note:**

- You can cut/copy pages from an image document and paste them within the same image document or into an image document that belongs to the same batch. You cannot cut/copy and paste pages from or to non-image documents.
- Hold down the **Ctrl** key to select multiple thumbnails.
- If you copied one or more pages, you can paste them multiple times but if you cut one or more pages, you can paste them only once.

2. Right-click a selected thumbnail and from the right-click menu, select **Cut** or **Copy**.
3. Right-click the page thumbnail before or after which you want to paste the pages, and select **Paste Before** or **Paste After** from the right-click menu.


The pages are pasted.

## Create and Remove Documents

After importing documents, you might want to split some of them by context. Or, you might want to combine some documents by removing separations between them. Some situations may need you to delete certain documents or duplicate them so you can use them in another set. The documents task bar lets you perform these actions.

- [Capture a Document](#)
- [Split a Document](#)
- [Remove a Document Separation](#)
- [Delete a Document and Its Pages](#)
- [Duplicate a Document](#)

## Capture a Document

You can add documents to batches via the Capture Document icon  on the Document pane task bar or the context menu option in the Batch pane.

To add documents:

1. If needed, press **Ctrl+Alt+S** and set a capture source. If scanning, place pages in the scanner.
2. In the **Batch** pane, right-click the batch to which you want to add documents and select **Capture Document**.


Alternatively, you can click  on the Document pane toolbar.

3. Do one of the following:
  - If importing from a source other than a scanner, then in the **Select Files to Import** dialog, select the required documents and click **OK**. In the **Import** dialog, choose **Create one document for all import files** or **Create one document per import file** and then click **OK**.
  - If scanning, then in the **Capture** dialog, choose either **Scan one page** or **Scan all pages** and click **OK**.

The documents are added to the batch.

## Split a Document

To split a document:


1. Select the page from which the new document should begin.
2. On the **Document** pane toolbar, click .

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

## Remove a Document Separation

To remove a document separation, which appends the selected document's pages to the previous document:


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

If you select the first document in a batch, you are prompted to delete the document because it has no previous document.
2. Click .
3. When prompted, select the option to remove the separation and click **OK**.

The document is merged with its previous document.


## Delete a Document and Its Pages

To delete a document and its pages:

1. Select the document to delete.  
You can select the document in the Batch pane or select one of its thumbnails in the document pane.
2. Click  in the **Document** pane toolbar.
3. When prompted, select the option to delete the document and click **OK**.

## Duplicate a Document

To duplicate a document:

1. You can either select the document in the **Batch** pane and click  on the **Document** pane toolbar or right click the document and select **Duplicate** from the context menu.  
The Duplicate dialog is displayed.
2. Select the **Current Document** option.
3. Specify the number of copies to be created in the **Number of Copies** field. The default value is 1 and the maximum value is 10.
4. Select the **Keep Metadata Values** field if you want the duplicated document(s) to have the same document profile and metadata values as the selected source document.
5. Click **OK**.

The newly created duplicated document(s) are inserted immediately after the currently selected source document in the batch/document list tree.

## Create and Remove Attachments


You append pages as attachments or split attachments to create more attachments. You can also delete attachments. The Document task bar provides you with the features to accomplish these tasks:

- [Capture an Attachment](#)
- [Split an Attachment](#)
- [Delete an Attachment and Its Pages](#)

## Capture an Attachment

You can add a new attachment to a document by scanning pages or importing files.

To add a new attachment:


1. If needed, press **Ctrl+Alt+S** and set a capture source. If scanning, place pages in the scanner.
2. In the **Batch** pane, right-click the document to which you want to add attachments and then select **Capture Attachment**. Alternatively, you can click  on the Document pane toolbar.
3. Do one of the following:

- If importing from a source other than a scanner, then in the **Select Files to Import** dialog, select the required documents and click **OK**. In the **Import** dialog, choose **Create one attachment for all import files** or **Create one attachment per import file** and then click **OK**.
- If scanning, then in the **Capture** dialog, choose either **Scan one page** or **Scan all pages** and click **OK**.

The attachment is added.

## Split an Attachment

To split an attachment:

1. In the source attachment, select the page on which you want to create a new attachment.
2. On the **Document** pane toolbar, click .

A new attachment that starts with the current page and includes all pages below it is created and listed below the source attachment in the Batch pane.




### Note:

You can perform this task only for image attachments.

## Delete an Attachment and Its Pages

To delete an attachment and its pages:

1. Select the attachment you want to delete in the **Batch** pane or select one of its thumbnails in the **Document** pane.
2. Click  in the **Document** pane toolbar.
3. Click **Yes** to delete the selected attachment and all its pages.

## Add, Replace, and Delete Pages

You can insert, append, replace, and delete pages when you are reorganizing your documents. You can edit individual pages in image documents or image attachments only. When editing non-image documents or non-image attachments, documents task bar options for editing individual pages are disabled.


- [Insert Pages](#)
- [Append Pages](#)
- [Replace a Page](#)
- [Delete a Page](#)

## Insert Pages

You can add pages to an image document or image attachment by scanning pages or importing files.

To insert pages:

1. If needed, press **Ctrl+Alt+S** and set a capture source. If scanning, place pages in the scanner.
2. To insert pages before the first page in a document or an attachment, right-click the document or attachment in the **Batch** pane and select **Insert Pages**.

To insert pages before the selected page in an active document or attachment, click  on the **Document** pane toolbar.

3. Do one of the following:
  - If importing from a source other than a scanner, then in the **Select Files to Import** dialog, select the required documents and click **OK**.
  - If scanning, then in the **Capture** dialog, choose either **Scan one page** or **Scan all pages** and click **OK**.


The pages or files are inserted.

## Append Pages

You can append pages to an image document or an image attachment by scanning pages or importing files.

To append pages to a document:

1. If needed, press **Ctrl+Alt+S** and set a capture source. If scanning, place pages in the scanner.
2. To append pages after the last page in a document or an attachment, right-click the document or attachment in the **Batch** pane and select **Append Pages** from the context menu.

To append pages after the selected page in an active document or an attachment, click  on the **Document** pane toolbar.

3. Do one of the following:
  - If importing from a source other than a scanner, then in the **Select Files to Import** dialog, select the required documents and click **OK**.
  - If scanning, then in the **Capture** dialog, choose either **Scan one page** or **Scan all pages** and click **OK**.

The pages are appended.


## Replace a Page

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

To replace a page:

1. If needed, press **Ctrl+Alt+S** and set a capture source. If scanning, place the replacement page in the scanner.
2. In the **Document** pane, select the thumbnail of the page to replace.



3. On the **Document** pane toolbar, click . Click **Yes** to confirm that you are deleting the selected page and replacing it with the page you are scanning or importing. If importing, select a file to replace the selected page. If there are duplicate pages of the page you are trying to delete, then choose if you want to replace only the selected page or all the pages (including the selected page and the linked pages) in the **Replace Page** dialog. Replace the pages with the page you are scanning or importing. If importing, select a file to replace the page.

 **Note:**

- When you duplicate a page in a document, the duplicated pages are linked to one another and also to the original source page. Therefore, when you try to replace such pages (which are linked to each other), you need to specify whether you want to replace only the selected page or all the pages (including the selected page and the linked pages).
- The **Replace Page** dialog shows the number of pages linked to the selected page. Click **All** to replace all the pages or click **Selected** to replace only the selected page. Click **Cancel** if you want to cancel the page replace.


## Delete a Page

To delete one or more pages in an image document or image attachment:

1. In the **Document** pane, select the thumbnails of pages to delete.

 **Note:**

- You can delete one or more pages only in image documents.
- Hold down the **Ctrl** key to select multiple thumbnails.

2. Click  or right-click a selected thumbnail and select **Delete** from the context menu. In the **Delete Pages** dialog, click **Yes** to confirm.

The selected pages are deleted from the document.

# Index Documents

All pages of a document share the same metadata values, so indexing one page of a document indexes all its pages. In the document pane, documents in a batch are visually divided by a light-colored bar. In the batch pane, documents are listed under their batch. If the selected client profile is configured for indexing, metadata fields display in the lower left pane when you select a document in the batch pane. To improve readability, you can adjust the font size of the metadata fields in the Preferences dialog.

To ensure standard input, metadata fields may use *input masks* or *input formatting*, *choice lists*, or *asset lookups*.

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

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

A *choice list* field provides a list of values from which to choose. If your client profile settings permit, a choice list may allow you to enter rather than select a value. Choice list fields can be dependent where a selection in one choice list field (the parent) determines the choices displayed in a dependent choice list field (the child).

A *Category Reference Type* field lets you choose an option from those available to you in the Category Selection Dialog.

Here is what you can do here:

- [Index Documents by Metadata](#)
- [Index Documents by Asset Lookup Values](#)

## Index Documents by Metadata

To index documents by metadata:

1. Select a document either in the **Batch** pane or in any of its thumbnail pages in the **Document** pane.

The metadata pane is displayed in the lower left pane. Some metadata fields may already contain autopopulated values.

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

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

3. Complete the required metadata fields.

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

## Index Documents by Asset Lookup Values

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

The **Asset Lookup** button is active when you can perform an asset search on the selected metadata field.

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

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

3. Click **Asset Lookup**.

The Asset Lookup Results dialog is displayed if multiple records are found. In case of a single record, values automatically fill one or more fields without displaying a list of results.

4. In lookup results, select a matching record and click **Select** to populate values from the repository in the metadata fields. (You can also double-click a record to select it.)

# 21

## Manage Batches

A batch includes scanned images, pages, and electronic documents that you can organize logically and store in a repository. After you've scanned or imported documents, you can index, edit, and release them.

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

- *Batches are automatically locked to you when you create them by scanning or importing, or when you open (expand) them.*

 **Note:**

When batches are left locked with users who are no longer available to unlock them, Content Capture administrators can unlock these batches for further processing.

- *If there are no release processes defined and you unlock batches, the documents and metadata are sent to the Oracle Content Management repository and they are unlocked.*
- *If you selected an available release process and released batches, the next action performed on a batch depends on the selected release process. During batch release, a progress bar moves to the right on the batch name to indicate release progress. You can select and work on other batches while the batch release continues in the background.*
- *After release, the next action performed on a batch depends on its client profile settings. Batches may move to a post-processing step, such as bar code recognition, document (PDF/TIFF) conversion, or committing to the Oracle Content Management repository. Or, they may become unlocked, allowing other users to lock and edit them. For example, after scan operators create, review, and edit batches, they might release them to index operators who select, index, and release them for post-processing.*

Here is what you can do with the batches you manage:

- [Change Batch Information](#)
- [View Batch Lock Information](#)
- [Release Batches](#)
- [Search for Batches or Filter the List](#)
- [Batch Processing Errors](#)
- [Find Batch Errors](#)
- [Abandon Batch Lock](#)
- [View Batch Activity Information](#)

## Change Batch Information

A batch may have been assigned a default priority and status by the client profile. You can assign it a priority number from 0 to 10 where 10 is the highest. You can also attach a status to a batch from the available status options. Similarly, you can attach a note to a batch as a reminder or to alert other users who might work on the batch. For example, you might enter a note indicating that a page is missing from a specified document in the batch.

To change the batch information:

1. In the **Batch** pane, select a batch.  
Batch information is displayed in the right pane. The **Priority**, **Status**, and **Batch Notes** fields are editable if the batch is locked to you.
2. Do the following, as required:
  - a. In the **Priority** field, select a new priority number from 0 to 10.
  - b. In the **Status** field, select a new status.
  - c. In the **Batch Notes** field, enter, modify, or delete text.
3. Click **Apply**.  
The changes are displayed in the Batch pane list.

## View Batch Lock Information

Any content capture user can check whom a batch is locked with and the name of the workstation on which the batch is locked. But only a content capture administrator can abandon the lock.



To view the batch lock information:

1. In the **Batch** pane, select a batch.
2. In the **Lock Information** pane, click **Get Information**.  
The Content Capture Client window displays the lock information.

## Release Batches

A client profile can include multiple release processes. To release a batch, choose the required release process from the list. If there are failed batches, you can multiselect them in the Content Capture Client and release these batches to the same process.

To release batches:

1. In the **Batch** pane, select one or more batches.
2. If the client profile includes several processes, from the drop-down list on the right side of , select a release process and then click . Alternatively, you can right-click one or more batches in the **Batch** pane, select **Release Batch**, and then select one of the [release process options](#) configured for you. These options are also available if you select one or more documents in a batch in the Batch pane.

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

 **Note:**


Released batches are refreshed periodically if you enable the **Auto Refresh Batches** client preference.

3. Optionally, click **Refresh Batch List** to view the new state of the batch. Once the release is complete, one of the following may happen:
  - The batch disappears from the batch pane, such as after a successful commit.
  - The batch icon displays a processing indicator indicating that it is undergoing further processing.
  - The batch icon displays an error indicator indicating that one or more of its documents encountered an error.

## Search for Batches or Filter the List

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

To search for batches:

1. In the **Batch** pane, click .
2. In the **Batch Search Criteria** dialog, specify how batches should be searched using the criteria listed in the table.

You can specify multiple search options. Keep in mind that all specified search fields must match for a batch to be found, although only one value *within* a search field needs to match. For example, if you select *Urgent* in the **Status** field and 8, 9, and 10 in the **Priority** field, batches with an Urgent status AND a priority of 8, 9 OR 10 are found. On the other hand, batches with an Urgent status but a priority of 0, or batches with no status and a priority of 8, 9, or 10, are not found.

**Table 21-1 Batch Search Criteria**

Search Criteria	Description
Batch Name	Enter a batch name to search for. You can specify a partial name followed by % to match one or more characters. For example, entering <code>Batch%</code> would match batches named <code>Batch15</code> and <code>Batches214</code> .
From Date/To Date	Search for batches created within a date range by clicking the calendar button adjacent to the date field and selecting a from date and an end date.
Status	Search for batches by their assigned status by selecting one or more statuses. Batches assigned any selected status will match.
Priority	Search for batches by their assigned priority by selecting one or more priorities. Batches assigned any selected priorities will match.

**Table 21-1 (Cont.) Batch Search Criteria**

Search Criteria	Description
Batch State	<p>Search for batches by their system-assigned state by selecting one or more states. Batches assigned any selected state will match. Available batch states include:</p> <ul style="list-style-type: none"> <li>• <b>Ready:</b> Batches are not locked and no errors have been encountered</li> <li>• <b>Locked:</b> Batches are locked by any user</li> <li>• <b>Error:</b> An error has been encountered in one or more documents in the batch</li> <li>• <b>Processing:</b> Batches are currently being processed by a processor or processor job</li> </ul>

3. Click **OK**.

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

To remove a search filter:

1. In the **Batch** pane, click **Search**.
2. In the **Batch Search Criteria** dialog, click **Clear Criteria**, and then click **OK**.

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

## Batch Processing Errors

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

### Errors while working on batches

When trying to view a non-image document in an associated application, if there is an error attempting to open the document in the associated application, the client displays the error message: *Failed to open document in an associated application. There may be no application associated to this document type.*

### Errors after releasing batches

- If an error occurs for a batch after you release it, such as during a post-processing step, the batch may display as locked to you in your Batch pane. (Note that a post-process may have renamed the batch.) You can right-click the document error icon and choose **Display Batch Errors** from the menu to view the error details.
- If you released a batch without completing all required metadata fields in each document, an error occurs if Content Capture is set to commit the batch as a post-processing step. Typically, all documents are committed and removed from the batch. However, documents that contain errors remain in the batch. To resolve the error, open the batch, complete all required metadata fields in all documents (an asterisk \* is displayed to the left of their names), and release the batch again.

## Find Batch Errors

To review errors associated with documents in a batch:

1. In the **Batch** pane, right-click a batch with the warning sign that indicates the batch has errors.
2. From the context menu, choose **Display Batch Errors**.  
The Batch Processing Errors dialog is displayed.
3. In the **Batch Processing Errors** dialog, select each row to view the errors associated with the document.  
The error messages are displayed in the **Message** box.
4. Click **Close** after you've reviewed the errors.

## Abandon Batch Lock

Occasionally it may be necessary to abandon a batch lock. For instance, a user may have a batch locked but may not be available to release the batch for some time. An administrator can unlock the batch so it can be locked by someone else. Another instance may be that a batch may be taking too long to complete processing by Content Capture, and has the appearance of being stuck. In any case, abandoning a batch lock may result in loss of unsaved information.

1. In the **Batch** pane, select a batch.
2. In the **Lock Information** pane, click **Get Information**.  
The Content Capture Client retrieves and displays the lock information.
3. Click **Abandon Lock** to release the lock.

## View Batch Activity Information

You can track the activity of a batch and share it with your support team for diagnostic purposes. For example, you create a new capture procedure for documents that contain barcodes. You've configured the scanned documents to flow through the barcode recognition processor to extract the barcode values and store them in capture fields. However, during the subsequent commit step, the assets being created in Oracle Content Management don't have the barcode metadata values in them. So, you redirect the output from the commit step back to the Content Capture Client so you could view the results of the barcode recognition.

To view the batch activity information:

1. In the **Batch** pane, select a batch.
2. In the **Batch Information** section, click **View Activity** to display the Batch History window.

 **Note:**

If no activities are available for your batch, a message "Activities for the selected batch are yet to be recorded." is displayed.



- In the **Batch Activity** section, audit events of the selected batch are displayed. The timestamp and the corresponding message text of each event are also shown. The table is sorted by date, oldest at the top. When you select a batch activity event, all log messages related to this event are highlighted in the **History** section on the right side. If you select any messages in the **History** section, as a result the batch activity event to which these messages belong is highlighted in the **Batch Activity** section.
- In the **Documents in Batch Activity** section, the documents in the batch are displayed. If it's a long list of documents, you can filter the document you are looking for using the **Filter** field.
- In the **Document Activity** section, the details of the document you selected in the **Documents in Batch Activity** section are displayed. When you select a document activity event, all log messages related to this event are highlighted in the **History** section on the right side. If you select any document activity messages in the **History** section, as a result the document activity event to which these messages belong is highlighted in the **Document Activity** section.

 **Note:**

While the batch is in process, you can load or refresh batch activities by clicking **Refresh**.

3. Click **Export** to generate a text-based version (a text file) of all of the details and share it with your support team for analysis. The default name of the text file is `<batch_name>_history.txt`.

# Part IV

## Setting Up Automated File Import

You can set up automated file import via email, folders, and list files under the **Capture** tab available for your procedure on the Procedures page. To set up an automated import, you create an import processor job that lets you configure these sources: Email, Folder, and File. You can also configure an import of content from on-premise WebCenter Content into Oracle Content Management.

- [Capture Files from a Monitored File Folder](#)
- [Capture Files from a Monitored Email Account](#)
- [Capture Files from a WebCenter Content Archive](#)
- [Create the Oracle Identity Cloud Service \(IDCS\) Application](#) or [Create the Oracle Cloud Infrastructure Identity and Access Management \(IAM\) Domain Application](#)

## Capture Files from a Monitored File Folder

You can configure import jobs on a computer that monitor folders for the files that the import processor should process without requiring regular human intervention. The file source could be an email address, a folder, or a list file. You [configure import jobs](#) in a procedure, on the Capture tab of the Procedures page. For folder and list file import jobs, the file import agent must be installed and running on the computer that can access the network folder in which the documents reside.

- [Understand Monitored File Folders](#)
- [Set Up the File Import Agent](#)

### Understand Monitored File Folders

You can automate importing and capturing files from a monitored folder on a computer. When you create an import job, you can designate any folder as a monitored folder. The import processor will then monitor that folder and process all files. You can also create an import job where you instruct the import processor to read list (text) files that list the files to be imported, along with their metadata.

Let's consider a scenario where employees of an organization scan expense reports on a multifunctional device and store them on a company network folder. In this case, what's required is an import job that uses a folder as the source type and the file import agent on the computer where the expense report folder resides. If the volume of the scanned documents is high, the file import agent can be set up on multiple computers that can access that network folder. So, the scanned documents can reside in subfolders and the multiple file import agent instances running on different machine can process subfolders simultaneously. The import processor, through the folder import job, monitors this folder on a regular interval, and through the file import agent it fetches new files and converts them into batches.

When you create a folder source import job, you can specify what file types the import job should monitor: TIFF, PDF, or all files. You can also specify whether each file should be an individual batch or a batch should include all files of a type or multiple types. A batch can include a maximum 500 files. The import processor also gives you the flexibility to specify the order in which files of a particular type should be processed. You can choose to delete the source files after they've been processed. To configure a folder import job, follow the steps in [Configure File Importing from a Folder](#).

You can also create an import job through which the import processor monitors a folder and reads a list (text) file containing records that identify what needs to be imported into Content Capture: files, attachment files, and optionally, metadata values to be assigned to the files. To configure a list file import job, follow the steps in [Configure List File Importing](#). After configuring the import job, you need to [set up the File Import Agent](#).

 **Note:**

It may happen that the file import agent crashes or loses connectivity when it is processing a *list file* job. If the agent doesn't recover during the default period of 60 minutes, previously uploaded files are forced-released and marked complete on the server. The agent still processes the remaining items from the list file job or rest of the files from the folder as new uploads.

## Set Up the File Import Agent

The file import agent is a command-line application that runs on any computer and serves as the source for importing content from a monitored file system location such as a folder or network drive. It monitors and captures the content in that location and feeds it to the import processor for further processing and routing according to the rules defined in the procedure.

You need to install and run the file import agent on your local computer only if your source is a monitored folder ([not a monitored email account](#)). The capture command-line utility is available to help you register servers, configure import jobs, and list them.

Setting up the file import agent consists of these steps:

1. [Download and Install the File Import Agent](#)
2. Oracle is in the process of updating Oracle Cloud Infrastructure (OCI) regions to switch from Identity Cloud Service (IDCS) to Identity and Access Management (IAM) identity domains. All new Oracle Cloud accounts will automatically use IAM identity domains. Depending on whether your region uses IAM identity domains or not, you'll use different documentation to complete your setup.
  - If your region has been updated, follow the steps in [Create the Oracle Cloud Infrastructure Identity and Access Management \(IAM\) Domain Application](#).
  - If your region hasn't been updated, follow the steps in [Create the Oracle Identity Cloud Service \(IDCS\) Application](#).
3. [Register Oracle Content Management with the File Import Agent](#)
4. [Use the Capture Command-Line Utility](#)

## Download and Install the File Import Agent

Before you can import files from a monitored folder, you need to install the file import agent on your local computer.

### System Requirements

The file import agent is a Java application that needs Oracle JDK version 17 or the latest version available at the time you're going to install this application. The file import agent is compatible with Windows, Linux, and Mac (see [Oracle JDK 17 Certified System Configurations](#)).

To download and install the file import agent:

1. Log in to the Oracle Content Management web interface and click **Capture** in the left navigation panel (under **Administration**). If you don't see this option, you don't have the required access privileges.

2. On the Capture Procedures page, under **Downloads**, click **Oracle Content Capture File Import Agent** to download the `capture-agent.zip` file to your local computer.
3. Extract the ZIP file.
4. You must add `<agent directory>\bin` to `PATH`. The agent directory is the folder where `capture-agent.zip` is extracted. You can also set the `CAPTURE_HOME` environment variable to the extracted directory and add `$CAPTURE_HOME\bin` to `PATH`.

On Mac:

```
sudo ln -s <agent directory>/bin/capture /usr/local/bin/capture
```

On Windows:

Run the `SystemPropertiesAdvanced.exe` file, then edit **Environment Variables**, and then add `<agent directory>\bin` to the `PATH` variable.

5. Set the `CAPTURE_JAVA_HOME` variable to valid JDK location either as an environment variable or in the `<agent directory>/conf/agent.properties` file.

## Register Oracle Content Management with the File Import Agent

Your Oracle Content Management instance must be registered with the capture command-line utility so the utility knows what import jobs are configured with the Oracle Content Management instance, and it can upload files to this instance.

To register Oracle Content Management:

1. [Download and install the File Import Agent](#) if you don't have it installed on your computer already.
2. Run *one* of these commands on your Windows, Linux, or Mac operating system:

```
$ capture register-server <NAME> --endpoint https://<oracle content management instance name>.oraclecloud.com -u username -p password --domainurl <REST Endpoint (Permanent)>/oauth2/v1/token --clientid sampleid --clientsecret sample-secret --scope https://<server name>:<port number>/urn:opc:cec:all
```

- Oracle Content Management instance URL: `<oracle content management instance name>.oraclecloud.com`
- User name and Password for your Oracle Content Management instance URL.

### Note:

To mitigate a potential security threat, consider creating a file import agent-specific user that is assigned only the content capture roles or permissions on the required procedures.

- Oracle Identity Service Instance URL: `<REST Endpoint (Permanent)>/oauth2/v1/token` (You copied REST Endpoint (Permanent) at the time of [creating the IDCS application](#). Or you copied its value when you [created the IAM domain application](#) if you've migrated your IDCS stripes to IAM identity domains.)

- Client ID: `sampleid` (You copied its value at the time of [creating the IDCS application](#). Or you copied its value when you [created the IAM domain application](#) if you've migrated your IDCS stripes to IAM identity domains.)
- Client Secret: `sample-secret` (You copied its value at the time of [creating the IDCS application](#). Or you copied its value when you [created the IAM domain application](#) if you've migrated your IDCS stripes to IAM identity domains.)
- Scope URL: `https://<server name>:<port number>/urn:opc:cec:all` (You copied its value at the time of [creating the IDCS application](#). Or you copied its value when you [created the IAM domain application](#) if you've migrated your IDCS stripes to IAM identity domains.)

**If you are using IDCS, alternatively get the IDCS token value:**

```
$ capture register-server <NAME> --endpoint https://<oracle content
management instance name>.oraclecloud.com --token <token value>
```

To get the token value, enter this URL from a browser: `https://Content Management URL:port/documents/web?IdcService=GET_OAUTH_TOKEN`

 **Note:**

- The `documents/web` context is protected by Oracle Identity Cloud Services (IDCS). The user will be prompted to sign in to IDCS unless there is already a valid IDCS session in the browser.
- The OAuth token is returned in the `tokenValue` field in the JSON response. The token is valid for 7 days, and the expiration is in seconds.

3. Test your connection by running the command to list the import jobs:

```
$ capture list-import-jobs
```

A list of all folder and file list import jobs configured in capture procedures on the specified Oracle Content Management instance is displayed.

After you've registered Oracle Content Management and configured import jobs, [configure file importing from a folder](#) or [configure list file importing](#).

## Use the Capture Command-Line Utility

The `capture` command-line utility lets you configure the file import agent so the agent can import documents in to the Oracle Content Management repository. It provides commands for using and managing the file import agent.

```
-----
capture
-----
usage : capture <command> [options]
Run capture <command> -h' to get the detailed help for the command.
Commands:
```

```

capture create-encryption-key <file>      Create an encryption key to encrypt/
decrypt password for servers.           [alias: cek]
capture register-server <name>           Registers an Oracle Content
Management server                       [alias: rs]
capture list-servers                     Lists registered
servers                                 [alias: ls]
capture list-import-jobs                 Lists all Import Jobs from
server                                  [alias: lij]
capture configure-import-job             Configures import job. Set Import
Folder path. Enable or disable.         [alias: cij]
capture configure-archiver-job           Configures archiver import job to
import content from on-premise

Content Management
capture trigger-import-job               Forces import job
processing.                             [alias: tij]
capture refresh-config                   Refresh configuration from
server.                                  [alias: rc]
capture list-procedures                  Displays capture
procedures.                             [alias: lp]
capture register-database <name>         Registers external
database.                               [alias: rd]
capture deregister-database              Deregister previously registered
database.                               [alias: dd]
capture list-databases                   Displays registered databases and
tables.                                  [alias: ld]
capture register-table                   Registers tables in a
database.                                [alias: rt]
capture deregister-table                 Deregister previously registered
table.                                   [alias: dt]
capture list-table-sync-jobs             Lists all Asset Sync Jobs from
server.                                  [alias: ltsj]
capture trigger-table-sync               Force table / asset
synchronization.                       [alias: tts]
capture start                            Starts import
agent                                    [alias: s]
capture stop                             Stops import
agent                                    [alias: x]
capture status                           Shows import agent
status                                  [alias: st]
capture help                             Shows this
message                                 [alias: h]

```

```

-----
capture create-encryption-key
-----
usage: create-encryption-key <file> [-h]
Create an encryption key to encrypt/decrypt password for servers and save to
<file>.
Options:
-h, --help  Show help
Example:
capture create-encryption-key ~/.ceckey          Create
encryption key and save to file ~/.ceckey
-----

```

```
capture register-server
```

```
-----
```

```
usage: capture register-server <name> -e <endpoint> -u <user> -p
<password> [-k <key>] [-d <domainurl>]
[-c <clientid>] [-s <clientsecret>] [-o <scope>] [-t <token>] [-m
<timeout>] [-x <proxy>]
```

Registers an Oracle Content Management server.

Specify -e <endpoint> for the server URL.

Specify -u <user> and -p <password> for connecting to the server.

Optionally specify -k <key> to encrypt the password.

Optionally specify <domainurl>, <clientid>, <clientsecret> and, <scope> for integration with IAM application.

Optionally specify <token> to use for authorization.

NOTE: -i and --idcsurl have been deprecated. For now they exist for backward compatibility but will be removed in a future release.

Options:

-e,--endpoint <endpoint>	Server endpoint
-u,--user <user>	User name
-p,--password <password>	Password
-k,--key <key>	The key file used to encrypt the password
-d,--domainurl <domainurl>	Oracle Identity and Access Management Instance URL
-c,--clientid <clientid>	Client ID
-s,--clientsecret <clientsecret>	Client secret
-o,--scope <scope>	Scope
-t,--token <token>	OAuth Token to use for authorization.
-m,--timeout <timeout>	Timeout in millisecond for connections to the server. Defaults to 60 seconds
-x,--proxy <proxy>	Set proxy host and port
-h,--help	Show help

Examples:

```
capture register-server server1 -e http://server1.com -u user1 -p
password1 -d
```

The server is a tenant on Oracle Public cloud

```
http://iam.com -c clientid -s clientsecret -o https://primary-audience-
and-scope
```

```
capture register-server server1 -e http://server1.com -u user1 -p
password1
```

The server is a tenant on Oracle Public cloud

```
capture register-server server1 -e http://server1.com -u user1 -p
password1 -m 60000
```

The timeout is set to 60 seconds

```
capture register-server server1 -e http://server1.com -u user1 -p
Welcome1 -x my_proxy_host:port
```

The proxy is set to my\_proxy\_host:port

```
capture register-server server1 -e http://server1.com -u user1 -p
Welcome1 -k ~/.mykey
```

The password will be encrypted

```
capture register-server server1 -e http://server1.com -t <token
value>
```

The token will be used for authorization



```

-----
capture list-servers
-----
usage: capture list-servers [-u <user>] [-f <pattern>] [-h]
Lists registered Oracle Content Management servers. Optionally specify -u
<user>
and -f <pattern> to filter results based on user or server name.
Options: -u,--user <user>          User name
-f,--pattern <pattern>          String to search in server name
-h,--help                        Show help
Examples:
capture list-servers                Lists all registered
servers
capture list-servers -u user1       Lists all registered
servers linked to user 'user1'
capture list-servers -f demo        Lists all registered
servers whose name contains 'demo'
-----
capture list-import-jobs
-----
usage: capture list-import-jobs [-f] [-l] [-h]
Lists all Import Jobs from server. Optionally specify -f and -l to show only
folder or list file import jobs.
Options:
-f,--folder          Display only folder import jobs
-l,--listfile        Display only list file import jobs
-h,--help            Show help
Examples:
capture list-import-jobs                Lists all
import jobs
capture list-import-jobs -f            Lists all
folder import jobs
capture list-import-jobs -l            Lists all
list file import jobs
-----
capture configure-import-job
-----
usage: capture configure-import-job -s <server> [-i <import>] [-p <path>] [-
e] [-E] [-d] [-D] [-h]
Configures the import job. Specify -s <server> -i <importjobid> to select
the server and import job.
Optionally specify -p <path> to set the import folder path.
Optionally specify -d to disable import job and -e to enable import job
Options:
-s,--server <server>          Set server name associated with import job
-i,--import <import>          Set Import Job Id
-p,--path <path>              Set Local Import Folder Path
-e,--enable                    Enables specific import job
-E,--enable-all              Enables all import jobs
-d,--disable                   Disables specific import job
-D,--disable-all             Disables all import job
-h,--help                      Show help
Examples:
capture configure-import-job -s prod -i import_id -p /Users/user1/data/
Sets the import directory

```

```

capture configure-import-job -s prod -i import_id -
e                               Enables a specific import job
capture configure-import-job -s prod -
D                               Disables all import jobs
capture configure-import-job -s prod -i import_id -
d                               Disables a specific import job
-----
capture configure-archiver-job
-----
capture configure-archiver-job -s <server> [-w <procedure>] [-p
<path>] [-c <importjob> | -u <importjobid>] [-e | -d] [-h]

Specify -s <server> to select the server, -w <procedure_id> to select
the procedure,
-p <path_to_archiver_export> to select the path,
-c <import_job_name> / -u <import_job_id> to create or update the
import job.

Options:
-s,--server <server>           Set server name associated with import
job
-w,--procedure <procedure>    Procedure identifier
-p,--path <path>              Path to archiver output folder
-c,--create <importjob>       Name of the new import processor Job
-u,--update <importjobid>     Identifier of the import processor Job
-e,--enable                    Enables specific import job
-d,--disable                   Disables specific import job
-h,--help                      Show help

Examples:
capture configure-archiver-job -s prod -w procedure_id -c 'Import
Job Name' -p /Users/user1/data/
Creates the import processor in the procedure and configures the
import path
capture configure-archiver-job -s prod -w procedure_id -u
import_job_id -p /Users/user1/data/
Updates the import processor in the procedure
capture configure-archiver-job -s prod -u import_job_id -d
Disables a specific import job
capture configure-archiver-job -s prod -u import_job_id -e
Enables a specific import job
-----
capture trigger-import-job
-----
usage: capture trigger-import-job -s <server> -i <import> [-h]
Forces import job processing.
Options:
-s,--server <server>         Set server name associated with import job
-i,--import <import>        Set Import Job Id
-h,--help                    Show help
Examples: capture trigger-import-job --server production --import xx-
job-id-xx
Forces processing of specified import job
-----
capture refresh-config

```

```
-----
usage: capture refresh-config [-s <server>] [-h] Refresh configuration from
server.
Optionally specify -s to only refresh config for selected server.
Options:
-s,--server <server>   Specify the server
-h,--help              Show help
Examples:
capture refresh-config                               Force refresh configuration for
all servers
capture refresh-config -s production                 Force refresh configuration
from specified server
-----
capture list-procedures
-----
usage: capture list-procedures -s <server> [-h]
Lists capture procedures. Must specify -s <server> to select a server.
Options:
-s,--server <server>   Specify the server
-h,--help              Show help
Examples: capture list-procedures -s octest          Lists all capture
procedures available for current user
-----
capture register-database
-----
usage: capture register-database <name> -s <server> -w <procedure> -c
<connection> -u <user> -p <password> [-a] [-h]
Registers on-prem database with Content Capture. Specify -c <connection> for
the connection URL,
-u <user> and -p <password> for connecting to the server.
Options:
-s,--server <server>           Specify the server
-w,--procedure <procedure>    Set procedure to be associated with database
-c,--connection <connection> Database connection url
-u,--user <user>              Database User name
-p,--password <password>     Database Password
-a,--attach                   Attach existing database
-h,--help                     Show help
Examples:
capture register-database ebsdb -s server1 -w 1 -c jdbc:oracle:thin:@//
host:port/service -u user1 -p pass
Register ebsdb with server1
-----
capture deregister-database
-----
usage: capture deregister-database -s <server> -w <procedure> -d <database>
[-e] [-h]
Deregister previously registered database. Specify -s <server>, -w
<procedure> and -d <database> to select the database.
Options:
-s,--server <server>           Specify the server
-w,--procedure <procedure>    Procedure associated with database
-d,--database <database>     Database to deregister
-e,--detach                   Only detach
-h,--help                     Show help
```

```
Examples:
capture deregister-database -s server1 -w 1 -d ebsdb
Deregister VENDORS table from ebsdb database
capture deregister-database -s server1 -w 1 -d ebsdb --detach
Detaches ebsdb database without deregistering it
-----
capture list-databases
-----
usage: capture list-databases -s <server> [-h] Lists registered
databases and tables. Must specify -s <server> to select a server.
Options:
-s,--server <server>   Specify the server
-h,--help              Show help
Examples:
capture list-databases -s octest      Lists all registered databased
linked to server 'ocetest'
-----
capture register-table
-----
usage: capture register-table -s <server> -w <procedure> -d <database>
-t <table> [-m <schema>] [-h]
Registers table with Content Capture. Specify -s <server>, -w
<procedure> and -d <database> to select the database.
Options:
-s,--server <server>           Specify the server
-w,--procedure <procedure>    Specify the procedure
-d,--database <database>      Specify the database
-t,--table <table>            Table to sync
-m,--schema <schema>          Override schema qualifier
-h,--help                      Show help
Examples:
capture register-table -s server1 -w 1 -d ebsdb -t VENDORS
Register VENDORS table from ebsdb database
capture register-table -s server1 -w 1 -d ebsdb -t VENDORS -m SVR
Register VENDORS table from ebsdb database in SVR schema
-----
capture deregister-table
-----
usage: capture deregister-table -s <server> -w <procedure> -d
<database> -t <table> [-m <schema>] [-h]
Deregister table. Specify table details.
Options:
-s,--server <server>           Specify the server
-w,--procedure <procedure>    Procedure associated with database
-d,--database <database>      Specify the database
-t,--table <table>            Table to sync
-m,--schema <schema>          Override schema qualifier
-h,--help                      Show help
Examples: capture deregister-table -s server1 -w 1 -d ebsdb -t
VENDORS
Deregister VENDORS table from ebsdb database
-----
capture list-table-sync-jobs
-----
usage: capture list-table-sync-jobs [-r] [-h] Lists all Asset Sync
```

```
Jobs from server.
Options:
-r,--refresh    Force refresh asset sync jobs from server
-h,--help      Show help
Examples:
capture list-table-sync-jobs          Lists all asset sync jobs
capture list-table-sync-jobs -r      Refresh asset sync jobs from
server and list them
-----
capture trigger-table-sync
-----
usage: capture trigger-table-sync -s <server> -a <asset> [-h]
Force table / asset synchronization.
Options:
-s,--server <server>    Set server name associated with table sync job
-a,--asset <asset>     Set Asset Sync Job Id
-h,--help              Show help
Examples:
capture trigger-table-sync -s production -a xx-123-sync-id-xx
Forces processing of asset synchronization job
-----
capture start
-----
usage: capture start [-h]
Starts capture agent.
Options:
-h,--help    Show help
Examples:
capture start          Starts capture agent if not running
-----
capture stop
-----
usage: capture stop [-h]
Stops capture agent.
Options:
-h,--help    Show help
Examples:
capture stop          Stops capture agent if currently running
-----
capture status
-----
usage:
capture status [-s <server>] [-i <import>] [-u <user>] [-m <machine>] [-l
<limit>] [-d <duration>] [-c | -p] [-h]
Display capture agent status and activity.
Options:
-s,--server <server>    Set Server name
-i,--import <import>   Set Import Job name
-u,--user <user>       Set user name. Defaults to current user
-m,--machine <machine> Set host name. Defaults to current hostname
-l,--limit <limit>     Set number of results to return. Defaults to 200
-d,--duration <duration> Set duration period in hours
-c,--completed          Display only completed uploads
-p,--pending            Display only pending uploads
-h,--help              Show help
```

```
Examples:
capture status          Display capture agent
status
capture status -u user@example.com  Show upload activity for
user : user@example.com
capture status -i Invoices          Show upload activity for
Invoices import job
capture status -m myhost.example.com Show upload activity for a
specific host / machine
capture status -p              Show uploads pending
completion
capture status -c              Show completed uploads
-----
capture version
-----
usage: capture version [-h]
Displays capture version details.
Options:
-h,--help    Show help
Example:
capture version
Display capture agent version
```

## Capture Files from a Monitored Email Account

You can create an import job using an email account as the source from which incoming email messages are captured and imported into Oracle Content Management. Each imported email message is treated as a batch, and its attachments and message body become separate documents within the batch. In the import job, you can specify the inbox folders that the import processor should monitor, configure message filters, specify the attachment file types that the processor should include in the batches, and specify how the message elements such as email address, date and time, subject should be handled. You can also choose the order in which different types of files should be processed.

Let's consider a scenario where employees scan their expense reports on multifunctional devices. Each expense report is converted into a PDF document, attached to an email message, and the email is delivered to an expenses inbox monitored by the import processor. The import processor, following the configuration settings in the import job, processes these email messages and their attachments.

You can create an email import job by performing the steps described in [Configure Email Message and Email Attachment Importing](#).

# Capture Files from a WebCenter Content Archive

You can import content from an on-premise WebCenter Content instance to Oracle Content Management. To do this, you need to create an archive of the on-premise WebCenter Content files using an admin archiver applet from the Content Server and transfer the archive to the system on which you are running the file import agent.

You can also export the folder tables as part of the archive definition which contains the folder path information of the files. In WebCenter Content 11g, the table is `folders_g` component (or Framework Folders, which was introduced later) and in WebCenter Content 12c it is Framework Folders component.

To import the on-premise content:


1. Copy the on-premise archive file to the folder where you want to run the [file import agent](#).
2. [Create a blank procedure](#). You'll need the procedure Id to configure the archive import job through the command-line utility in the next step.
3. To configure the archive import job, run the `capture configure-archiver-job` command via the command-line utility.
4. Go to the **Metadata** tab of your procedure to verify that the metadata is populated in the **Metadata Fields** table. These fields are read from the `docmetadefinition.hda` file of the archive export. In addition to these custom fields, this tab also includes default metadata fields that are always created when an archive is imported into a procedure.
5. Verify that an import processor job is created under the **Capture** tab in the **Import Processors** table. Note that this job is offline at present. Before you make it online, you must configure a commit profile so the imported content can be stored in a repository.
6. Create a Digital Content Type (required) and [map its fields with the metadata fields](#) in the commit profile that you'll create in the next step.
7. [Configure a commit profile](#) with the **Asset Repository** as the destination. For versioned documents in WebCenter Content, enable the same version order in the target repository in Oracle Content Management by creating a document and attachment mapping on the **Commit Driver Settings** tab of the commit profile:
  - a. For **Asset Type**, select the **Digital Asset Type Created**.
  - b. For **Asset Action**, select **Find by Search, Else Create**.
  - c. Add a search criteria and set the **Asset Field** as the field which is mapped to `dDocName` and **Capture Field** as `dDocName`.
  - d. For the **When more than one asset is found** option, select **Version most recent**.



 **Note:**

- Here `dDocName` is considered because it is unique and specific to a document. You can also consider `dRevClassId`.
- Migration of versioned documents from WebCenter Content is limited to asset and business repositories in Oracle Content Management.

8. Under the **Capture** tab in the **Import Processors** table, select the import


processor job and then click  to do the following:

- a. On the General Settings page, verify that **Archiver Source** is pre-selected as **Import Source**.
- b. On the Document Profile page, select the **Import web viewable files** check box if you want web viewable files to be processed, and then select an attachment type in the **Attachment Type for web viewable files** drop-down list.

If you leave this check box unselected, the **Attachment Type for web viewable files** drop-down list remains disabled.

 **Note:**

If the folders table is exported in the archive, then files' folder information it contains can be mapped to any metadata attribute using the *Folder Name* and *Folder Path* system fields. These two fields are unique to Archiver imports, and they refer to the folder name and path values that exist in WebCenter Content.

- c. On the Import Source Settings page, in the **Archiver Post Processing** section, select the **Delete Archiver output after import** check box if you don't want to preserve the archive folder. In the **Hours to preserve archiver original** field, the number you select signifies the hours for which the archive processed folder is preserved before it's deleted. If you enter 0, the archive processed folder is deleted when the next scheduled job is run (whenever the next job is available).
  - d. If you created an attachment type on the Classification tab, then on the Document Profile page, in the **Attachment Type for web viewable file** drop-down list, select the type you want to process as part of the import processor job.
  - e. On the **Post Processing** page, select only **Commit Processor**. Nothing else should be selected.
9. To make the import processor job online, go to the **Capture** tab and select the job in the **Import Processors** table and click .

Contents of the archive folder are uploaded to your repository in Oracle Content Management. The corresponding metadata is also copied in the format of the new content items that you created. Then, a new parallel folder with the name

<foldername>-processed is created in which the files are moved one by one. For example, if the folder name is *Archiver Export*, the parallel folder would be named *Archiver Export-processed*.

 **Note:**

If you chose to delete the archive folder on the Import Source Settings page, in the **Archiver Post Processing** section, only the Archive Export-processed folder is deleted. The original archive file is retained for any future validations.

10. To diagnose errors in the file import agent and the Content Capture Client:
  - check the log file `capture.log` in the file import agent. This log file includes information about the number of files imported, failed, and so on.
  - configure a client profile in Content Capture to analyze errors in batch activity logs of the Content Capture Client. After resolving the errors, you can release a batch again from the Content Capture Client.

# Part V

## Install and Configure the WebCenter Forms Recognition Agent

Using the information provided in the following topics, you can set up the WebCenter Forms Recognition (WFR) agent to work with Content Capture. The WFR agent interacts with Content Capture to retrieve queued documents and pushes those documents to WFR by performing a WFR import job. Once WFR has processed the documents, the WFR agent retrieves the WFR exported XML file and sends back the extracted file and altered metadata values to Content Capture.

- [Create the Oracle Identity Cloud Service \(IDCS\) Application or Create the Oracle Cloud Infrastructure Identity and Access Management \(IAM\) Domain Application](#)
- [Add an Import Group to WebCenter Forms Recognition Project](#)
- [Configure Your Capture Procedure](#)
- [Download and Install the WebCenter Forms Recognition Agent](#)
- [Get to Know the WebCenter Forms Recognition Agent Dashboard](#)
- [Configure the WebCenter Forms Recognition Agent](#)
- [WebCenter Forms Recognition Agent Status Messages](#)
- [WFR Agent Operations](#)

## Add an Import Group to WebCenter Forms Recognition Project

To add an import group:

1. Log in to the WebCenter Forms Recognition admin interface.
2. In the navigation tree on the left side, expand the **Runtime Server Administration** node and then expand **localhost**.
3. Select the project you want to set up. If the service is running, right-click it and select **Stop**.
4. To set the project properties, right-click the project and select **Properties**.
5. In the **WebCenter Forms Recognition Runtime Service Properties** dialog, go to the **Import** tab.
6. Select the **Import Group** option and then from its drop-down list, select the import group you configured in the WebCenter Forms Recognition Agent in the capture procedure configuration.
7. Save your changes and start the project service.

# Configure Your Capture Procedure

To configure your procedure for the WFR Agent, do the following:

1. In your procedure, open the **Processing** tab.
2. In the **External Processor** table, open your external processor job. If you have not created an external processor job yet, you can do so now by following the steps in [Configure External Processor Jobs](#).
3. Copy the **Procedure Step ID**. You'll need it when you register your procedure with the WFR Agent.
4. If you are returning the full extracted content back, it is likely you want to make sure that the metadata field which is configured to have assigned the full extracted content is marked as multi-line type. This is the field whose XPath is set to `/`.

## Download and Install the WebCenter Forms Recognition Agent

WebCenter Form Recognition and the WFR agent must be installed on the same computer because the agent needs access to the file system to fetch the exported content. Make sure that JDK 1.8 or higher is also installed. The WFR agent requires a database schema to track its activity. For convenience, you can choose to use the same database schema that was used for WFR itself. To be able to use the WFR agent, WFR APIs and the Content Capture instance must also be configured.



### Note:

Before upgrading to a new version from any previous version which was released before March 2022, you must first take a backup of the `config` folder and any other log files that you wish to preserve.

To install the WFR Agent:

1. Log in to the Oracle Content Management web interface and click **Capture** in the left navigation panel (under Administration).
2. On the Capture Procedures page, under **Downloads**, click **Oracle WebCenter Forms Recognition Agent** to download the setup file to your local computer.
3. Run the setup file and complete the installation steps.
4. Navigate to the location where the agent is installed: `C:\Program Files (x86)\Oracle\Oracle WebCenter Forms Recognition Agent`.
5. To create a database schema for the WFR Agent, execute the `createDBSchema.bat` file as administrator and complete the steps.
6. To start the WFR Agent, run the `startWFRAgent.bat` file as administrator.

Before you configure the WFR Agent, make sure you create [an IDCS application for the agent](#) or [an IAM application](#) if your IDCS stripes have been migrated to IAM identity domains.

# Get to Know the WebCenter Forms Recognition Agent Dashboard

Your WebCenter Forms Recognition Agent dashboard is where you view integrations by their names and status messages. Let's take a look the dashboard.

**Content Management**  
WebCenter Forms Recognition Agent

Dashboard Settings About

**Recent Document Activity**

Integration Name: Status Message: Search Purge Records

Document Id	Integration Name	Status Message	Retry Count	LastUpdatedDate
c06f0b35-7e9d-47bc-a5be-42f4f2dcefd4	contracts-pull	Callback Success	0	2021-11-29T06:04:07.753Z
c141b952-4ed8-4adc-bde0-49034890d471	contracts-pull	Import Processing Failed	3	2021-11-25T10:44:22.489Z
233ac40e-fa4d-46c8-af59-97d8e29faa9a	contracts-pull	Import Processing Failed	3	2021-11-25T10:41:22.461Z

Page 1 of 1 (1-3 of 3 items) |< < 1 > >|

Item	Description
1	On the top right are the options to navigate to Dashboard, Settings and About pages. On the <i>Dashboard</i> page you can view integrations by name and applicable statuses and purge successful integrations and those that failed after the retry count of 3. On the <i>Settings</i> page you <a href="#">configure the WFR Agent integrations</a> . The <i>About</i> page provides the build Id and copyright information. The build Id is required at the time of contacting the support team for the resolution of any build issues that you run into.
2	In the <b>Recent Document Activity</b> section, you can search for integrations by their names and status messages.
3	The <b>Purge Record</b> button lets you delete successful integrations and those that failed after trying for three times.

## Configure the WebCenter Forms Recognition Agent

Before you configure the WFR agent, make sure you have created [an IDCS application for the agent](#) or [an IAM application](#) if your IDCS stripes have been migrated to IAM identity domains.

To configure the WFR agent:

1. Log in to the WFR agent interface at `http://localhost:8888` using the default user name, `extproc` and password, `p@ssw0rd1`.
2. Click **Settings** on the top right.

3. In **Settings** drop-down list, select **General**.
4. In the **Agent Configuration** section, configure all the properties based on the information provided in the following tables:

**Table 1 General Properties**

Property Name	Description
Stage Directory	Configures the file system location in which the WFR agent stores the documents received from Content Capture before the WFR import job is performed. The WFR agent cleans up this file system location periodically. This property is enabled during an initial configuration only.
Purge Completed Requests in Days	Indicates after how many days of a successful job, the document's data should be purged from the WFR agent database. The default value is 1 day. The value can range is 1 to 5 days. This property is enabled during an initial configuration and also for successive updates.
Logger Level	Configures the tracing level for WFR agent log file. By default the level is set to INFO. This is a drop-down field with values: TRACE, INFO and ERROR. This property is enabled during an initial configuration and also for successive updates.

**Table 2 Database Connection Properties**

Property Name	Description
URL	Configures the WFR agent database connection string. This property is enabled during an initial configuration only.
User	Configures the user name for successfully establishing a connection with the database. This property is enabled during an initial configuration only.
Password	Configures the password for the database user to successfully establish a connection with the database. This property is enabled during an initial configuration only.
Database Type	Configure the corresponding database type for successfully establishing a connection with the database. This is a drop-down list, which is enabled during an initial configuration only.

**Table 3 Agent's Administrative User**

Property Name	Description
User	Configures the user name for accessing the WFR agent configuration user interface. The default user name is <code>extproc</code> . This property is enabled during an initial configuration only.

**Table 3 (Cont.) Agent's Administrative User**



Property Name	Description
Password	Configures the user password for accessing the WFR agent configuration user interface. This property is enabled during an initial configuration only.

**Table 4 WebCenter Forms Recognition Connection Properties**

	Description
URL	Configures the WFR API REST end-point connection URL. This property is enabled during the initial configuration only.
User	Configures the user name for client applications to successfully establish a connection with WFR APIs. This property is enabled during the initial configuration only.
Password	Configures the user password for client applications to successfully establish a connection and invoke the WFR APIs. This property is enabled during the initial configuration only.

**Table 5 SSL Properties**

Property	Description
SSL Enabled	Toggle SSL enable/disable. The default value is false.
SSL Port	Port configured for SSL. It is a read-only property, and the default value is 443.
Protocol	SSL protocol is a read-only property, and the default value is TLS.
Key Alias	Alias for the certificate that identifies the key in the key store.
Key Password	Password for the certificate. It is used to access the key in the key store.
Key Store File	Path to the key store that holds the SSL certificate (such as cacerts).
Key Store Type	Type of the key store. Supported values are pkcs12 and jks.
Key Store Password	Password to access the key store.
Key Provider	Provider for the key store, for example, SUN.

- After completing the agent configuration, in the **Settings** drop-down list, select **Integrations**.
- In the **Integration Selection** section, click  to display the **Integration Configuration** section in which you will add property values. To edit existing properties, click .
- Add capture procedure connection properties based on the information provided in the following tables:

**Table 6 General Settings**

Property Name	Description
Integration Name	Configures the integration name of your procedure so it's easily identifiable. This property is enabled during an initial configuration and also for successive updates.
Operation Mode	Configures the ingestion of documents in the WFR agent. The PULL method enables the WFR agent to pull the queued documents from Content Capture for processing. This property is enabled during an initial configuration only.

**Table 7 Content Capture Connection Properties**

Property Name	Description
Procedure Step ID	Configures the capture procedure step Id. This is the value you copied in step 3 when you configured an <a href="#">external processor in Content Capture</a> . This property is enabled during an initial configuration only.
Capture URL	Configures the tenant URL to establish a connection with Content Capture. This property is enabled during an initial configuration and also for successive updates.
User	Configures the user associated with the IDCS client application for the WFR agent to communicate with the capture procedure. This property is enabled during an initial configuration and also for successive updates.
Password	Configures the password for the user associated with the IDCS client application for the WFR agent to communicate with the capture procedure. This property is enabled during initial configuration and also for successive updates.

**Table 8 IDCS Connection Properties**

Property Name	Description
Client ID	Configures the client Id of the IDCS client application using which the WFR agent communicates with the capture procedure. This property is enabled during an initial configuration and also for successive updates.
Client Secret	Configures the client secret of the IDCS client application using which the WFR agent communicates with the capture procedure. This property is enabled during initial configuration and also for successive updates.
URL	Configures the URL to establish a connection with the IDCS. This property is enabled during an initial configuration and also for successive updates.



**Table 8 (Cont.) IDCS Connection Properties**

Property Name	Description
Scope	Configures the IDCS client application scope that the WFR agent uses to communicate with the capture procedure. This property is enabled during an initial configuration and also for successive updates.

**Table 9 WebCenter Forms Recognition Connection Properties**

Property Name	Description
Import Group	Configures the specific import group associated with the WFR project to which the WFR agent should import the capture procedure documents. This property is enabled during an initial configuration and also for successive updates.
Export Directory	Configures the file system location for the WFR project-specific export directory. The WFR agent searches this location for successfully exported documents. This property is enabled during an initial configuration and also for successive updates.
Import Processing Time Limit	Configures the WFR agent timeout period so the processor waits for the WFR to process the document after importing it to WFR. By default, the WFR agent looks for the document to be exported in the export directory for 24 hours. If it cannot find the document within that time, the WFR agent updates the status for that particular document as "Import Processing Failed". This property is enabled during an initial configuration and also for successive updates.

8. Click **Next** and configure the following:

Field Name	Description
Data Format	Configures data format for the attachment file and also for the field whose value is full extracted content. This drop-down list includes XML and JSON options to choose from. It is enabled during the initial configuration and remains enabled for successive updates.
Attach extracted data as a file	Specifies if the extracted data needs to be attached as a file or not. It is a check box, which is enabled during the initial configuration and remains enabled for successive updates.
Attachment type	Configures the attachment type for extracted data to be attached as a file. It is a text box, which is enabled during the initial configuration and remains enabled for successive updates.
Generate XPath from WFR XML template	Uploads the WFR XML template file which provides a set of XPath field mappings to the capture fields from the WFR Project. The uploaded XML file is stored by the WFR Agent.

9. To add metadata, click  and enter the following:

Field Name	Description
Metadata	Includes the name of the capture field to which the data from WFR is assigned. This is a capture metadata field name (case-sensitive).
xPath	Selects WFR xPaths from a combo box containing all the generated xPaths. If you want all of the XML data returned as a field value, then provide the name of the capture field to which the data is assigned and the XPath punctuation "/".
Actions	Provides the edit and delete functionality.

10. Click **Submit**.

11. If you have configured the WFR Agent (general configuration) for the first time, you must restart the agent.

## WebCenter Forms Recognition Agent Status Messages

A document goes through different stages when the WebCenter Forms Recognition agent processes it. The following table lists various statuses a document could be assigned during its lifecycle.

Status Message	Description
Download Document Pending	Agent has not yet started to download the document content from the Content Capture instance.
Download Document Processing	Agent has started to download the document content from the Content Capture instance.
Download Document Failed	Download of the document content failed.
Import Pickup Pending	Agent has not yet started to import the document to WFR.
Import Pickup Success	Agent has picked the document for importing it to the WFR.
Import Processing	Agent has submitted the document to the WFR for performing the extraction job.
Import Processing Failed	Import processing of the document failed.
Import Processing Success	Imported processing of the document completed successfully.
Callback Attachment Processing	Agent has started to process the attachment of the extracted content to the document.
Callback Attachment Success	Agent completed the attachment of extracted content to the document successfully.
Callback Attachment Failed	The attachment of extracted content to the document failed.
Callback Processing	Agent has started to process the release callback of the document to Content Capture.
Callback Failed	Release callback of the document to Content Capture failed.

Status Message	Description
Callback Success	Release callback of the document to Content Capture completed successfully.
Callback Completed Error	Release callback of the document to Content Capture completed with error(s).

# WFR Agent Operations

See the following topics to learn how you can start and stop the WFR agent, the key directories/files that are available within the WFR agent installation directory, as well as learn how to create a read-only view for inbound metadata access.

## How to Start the WFR Agent?

To start the WFR agent:

1. Run the command prompt as administrator.
2. Navigate to the **startWFRAgent.bat** file. Its default location is C:\Program Files (x86)\Oracle\Oracle WebCenter Forms Recognition Agent\startWFRAgent.bat.
3. Run the **startWFRAgent.bat** file.

### Note:

If you do not run the **startWFRAgent.bat** file as an administrator, you'll encounter errors such as the following in the command prompt:

```
C:\Program Files (x86)\Oracle\Oracle WebCenter Forms Recognition
Agent>startWFRAgent.bat
2022-01-23 22:38:36,518 main ERROR RollingFileManager (extproc-logs/
extproc.log)
    java.io.FileNotFoundException: extproc-logs\extproc.log (Access is
denied)
    java.io.FileNotFoundException:
extproc-logs\extproc.log (Access is denied)
at java.io.FileOutputStream.open0 (Native Method)
at java.io.FileOutputStream.open (Unknown Source)
at java.io.FileOutputStream.<init> (Unknown Source)
at java.io.FileOutputStream.<init> (Unknown Source)
```

4. To simplify starting the server, create a shortcut to this file on your desktop. Since the agent should always be run as an administrator, configure the shortcut to do that for you.
  - a. From the **Start** menu, search for the `startWFRAgent.bat` file.
  - b. Right-click the file and select **Open file location**.
  - c. Right-click the app shortcut and select **Properties**.
  - d. On the **Shortcut** tab, click **Advanced**.

- e. Select the **Run as administrator** option.
- f. Click **OK**, then click **Apply**, and then click **OK**.

## How to Stop the WFR Agent?

To stop the WFR agent:

1. Open the command prompt in which you started the WFR agent as an administrator, and then press **Ctrl + C**.

You'll notice messages like:

```
2022-01-23 22:38:06,849 [SpringApplicationShutdownHook] INFO
c.z.h.HikariDataSource - HikariPool-1 - Shutdown initiated...
2022-01-23 22:38:06,896 [SpringApplicationShutdownHook] INFO
c.z.h.HikariDataSource - HikariPool-1 - Shutdown completed.
Terminate batch job (Y/N)?
```

2. Type in **Y/y** and press **Enter**.

The WFR agent will be stopped/shutdown.

## Key Directories and Files within the Installation Directory of the WFR Agent

The following table lists the key directories and files you'll see within the installation directory of the WFR agent.

Directory/File	Location
WFR agent log file(s) that might be helpful in diagnosing issues.	C:\Program Files (x86)\Oracle\Oracle WebCenter Forms Recognition Agent\extproc-logs\extproc.log
The spring-boot application properties file should not be updated and/or deleted manually. Doing so will cause the WFR agent to behave inconsistently.	C:\Program Files (x86)\Oracle\Oracle WebCenter Forms Recognition Agent\config\application.properties
In case SSL certificate is configured, the certificate file will be stored in the config directory.	C:\Program Files (x86)\Oracle\Oracle WebCenter Forms Recognition Agent\config
The xpath directory consists of every WFR agent configured and Capture procedure-specific WFR XML template files for XPath mapping.	C:\Program Files (x86)\Oracle\Oracle WebCenter Forms Recognition Agent\stage\xpath
The document from Content Capture will be stored temporarily in the stage directory before it is imported into WFR.	C:\Program Files (x86)\Oracle\Oracle WebCenter Forms Recognition Agent\stage

# How to Create a Read-Only View for Inbound Metadata Access?

To support tracking, reporting, and validation of documents between WebCenter Forms Recognition and Content Capture, the document metadata created in Content Capture is stored in the WFR agent database. WebCenter Forms Recognition queries this metadata when the data needs to be passed from Content Capture to WebCenter Forms Recognition. To enable tracking of document progress via the WFR agent, you need to grant the SELECT access from the WebCenter Forms Recognition schema to the WFR agent database schema. The SELECT access also lets you create a view of the WFR agent database tables that you can query even after underlying tables are modified.

To grant the SELECT access to the EPDOCUMENTS table, you need to create a read-only user for the WFR Agent schema:

## Create a User

Create a user `<username>` identified by "`<password>`";

For example: Create the user `extproc_read_only` identified by "welcome1";

## Grant Privileges

Grant `<privilege>` to `<user>`

For example: Grant create session to `extproc_read_only`;

## Create a Read-Only User: Example

```
SQL> connect <sys as sysdba>/<password>
SQL> create user extproc_read_only identified by welcome1;
SQL> grant create session to extproc_read_only;
SQL> grant select on <wfr_agent_schema_user>.EPDOCUMENTS to
extproc_read_only;
```

## Read-Only User's Access to the EPDOCUMENTS Table: Example

```
SQL> connect extproc_read_only/welcome1
SQL> select * from <wfr_agent_schema_user>.EPDOCUMENTS;
```

# Part VI

## Appendixes

The following appendix is available:

- [Create the Oracle Identity Cloud Service \(IDCS\) Application](#)
- [Create the Oracle Cloud Infrastructure Identity and Access Management \(IAM\) Domain Application](#)

## Create the Oracle Identity Cloud Service (IDCS) Application

Follow these steps if you have *not* migrated your Oracle Identity Cloud Service (IDCS) stripes to IAM identity domains.

To create an IDCS application:

1. Log in to the [My Services](#) dashboard.
2. Click **Identity Cloud**.
3. Copy the **Service Instance URL** and the **REST Endpoint (Permanent)**, as provided on this page. You'll use these URLs later.
4. In the Identity Cloud Service console, expand the **Navigation Drawer**, and then click **Applications**.
5. Click **Add**.
6. In the **Add Application** page, click **Confidential Application**.
7. In the **App Details** pane of the **Add Confidential Application** window, enter a name for your application and click **Next**.
8. Choose **Configure this application as a client now**.
9. Under **Authorization**, select **Resource Owner** and **JWT Assertion**.
10. Under **Token Issuance Policy**, choose **All** for **Authorized Resources** and click **Next**.
11. On the **Resource** tab, accept the default values and click **Next**.
12. On the **Web Tier Policy** tab, accept the default values and click **Next**.
13. On the **Authorization** tab, accept the default values and click **Next**.
14. Click **Finish**.  
Copy **Client ID** and **Client Secret**. You'll need them when you register your server with the file import agent (see [Use the Capture Command-Line Utility](#)) or the WFR agent.
15. On the **Users** tab, click **Assign** and add the user that should have access to this application and whose 2-factor authentication is disabled. Remember the user and credentials. You'll need them when you register your server with the file import agent or the WFR agent.

16. On the **Configuration** tab, expand **Client Configuration**.
17. Scroll down to the **Token Issuance Policy** section and click **Add Scope**.
18. In the **Select Scope** dialog, find your Oracle Content Management instance and click **>**.
19. Select the scope that has the URL with `/urn:opc:...` and then click **Add**.
20. Copy the **Scope URL**. You'll need it when you register your server with the file import agent (see [Use the Capture Command-Line Utility](#)) or the WFR agent.
21. Click **Save** and then click **Activate**.

Your IDCS application has been created. You can now go ahead and register your server with your file import agent, WFR agent, or a content capture API.

# Create the Oracle Cloud Infrastructure Identity and Access Management (IAM) Domain Application

Follow these steps if your Oracle Identity Cloud Service (IDCS) stripes have been migrated to IAM identity domains.

To create an IAM domain application:

1. Log in to the Oracle Cloud Console.
2. In the navigation menu, click **Identity & Security**.
3. Under **Identity**, click **Domains**. Select the identity domain you want to work in.
4. Copy the domain URL from the domain overview page. You'll use it later.
5. In the **Identity domain**, click **Applications**.
6. Click **Add**.
7. In the **Add Application** page, click **Confidential Application**.
8. In the **App Details** pane of the **Add Confidential Application** window, enter a name for your application and click **Next**.
9. Choose **Configure this application as a client now**.
10. Under **Authorization**, select **Resource Owner** and **JWT Assertion**.
11. Under **Token Issuance Policy**, choose **All** for **Authorized Resources** and click **Next**.
12. On the **Resource** tab, accept the default values and click **Next**.
13. On the **Web Tier Policy** tab, accept the default values and click **Next**.
14. On the **Authorization** tab, accept the default values and click **Next**.
15. Click **Finish**.

Copy **Client ID** and **Client Secret**. You'll need them when you register your server with the file import agent (see [Use the Capture Command-Line Utility](#)) or the WFR agent.

16. On the **Users** tab, click **Assign** and add the user that should have access to this application and whose 2-factor authentication is disabled. Remember the user and credentials. You'll need them when you register your server with the file import agent or the WFR agent.
17. On the **Configuration** tab, expand **Client Configuration**.
18. Scroll down to the **Token Issuance Policy** section and click **Add Scope**.
19. In the **Select Scope** dialog, find your Oracle Content Management instance and click **>**.
20. Select the scope that has the URL with `/urn:opc:...` and then click **Add**.
21. Copy the **Scope URL**. You'll need it when you register your server with the file import agent (see [Use the Capture Command-Line Utility](#)) or the WFR agent.
22. Click **Save** and then click **Activate**.

Your IAM domain application has been created. You can now go ahead and register your server with your file import agent, WFR agent, or a content capture API.