Documentation that describes how to configure Capture components for use with WebCenter Forms Recognition
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Preface

This document describes how to configure Capture components for use with WebCenter Forms Recognition. WebCenter Forms Recognition can be used with WebCenter Enterprise Capture 11g or WebCenter Capture 10g releases and in a variety of automated imaging solutions. This guide uses an Invoice Processing use case in its examples.

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Related Documents

See the following documents for information related to a WebCenter Forms Recognition/Enterprise Capture 11g integration.

Oracle WebCenter Enterprise Capture

- Oracle Fusion Middleware Managing Oracle WebCenter Enterprise Capture
- Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture

Oracle WebCenter Forms Recognition

- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Installation Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition AP Project Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Runtime Server User’s Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Designer User’s Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Verifier User’s Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Web Verifier User’s Guide
Oracle Imaging and Process Management

Oracle Fusion Middleware Oracle WebCenter Forms Recognition AP Project Migration Guide

Conventions

The following text conventions are used in this document:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td><code>monospace</code></td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>
This chapter provides a general introduction to Oracle WebCenter Forms Recognition. Oracle WebCenter Forms Recognition is a learning-based solution that uses intelligent data capture capabilities to recognize, categorize, and extract information from documents. WebCenter Forms Recognition automatically extracts metadata values needed for workflow routing from document images, along with header level and line item data and validates the metadata against a database (such as a line of business application’s database) to confirm accuracy.

Together with WebCenter Enterprise Capture and WebCenter Content: Imaging capabilities, WebCenter Forms Recognition facilitates processing large volumes of business documents to automate data extraction and minimize the need for human intervention.
This chapter describes how to configure WebCenter Forms Recognition Integration with WebCenter Enterprise Capture 11g.

This chapter includes the following sections:

- WebCenter Enterprise Capture 11g Integration Overview
- Task 1: Configure an Invoices Workspace and Elements
- Task 2: Configure Client Scanning of Invoices
- Task 3: Configure Commit Processing
- Task 4: Test the Client Profile and Commit Profile
- Task 5: Configure Import Processing of Emailed Invoices
- Task 6: Configure Document Conversion Processing
- Task 7: Configure Recognition Processing for Document Separation
- Task 8: Configure WebCenter Forms Recognition to Process Committed Documents

2.1 WebCenter Enterprise Capture 11g Integration Overview

Figure 2–1 illustrates a Capture workspace configuration for manual and automated capture, conversion, and commit of invoices for subsequent Accounts Payable processing.
1. Invoices enter a Capture workspace through one of several manual or automated paths:
   a. **Capture Client**: An Accounts Payable clerk scans paper invoices using a client profile. Because scanning always creates image documents, no document conversion is needed.
   b. **Email**: Vendors email invoices as attachments to email messages. In Capture, an email Import Processor job imports the attachments and creates batches from them, then sends the batches to the Document Conversion Processor to ensure image format for Forms Recognition processing. (Invoice documents already in image format pass through document conversion unchanged.)

2. A commit profile commits the emailed or scanned invoice documents to a folder. The Capture commit outputs each invoice document as a multiple page TIFF file with a unique name.

3. WebCenter Forms Recognition imports the image files from the Capture commit folder and processes them.

   WebCenter Forms Recognition monitors the Capture commit folder, importing image files it finds, parsing their filename metadata, and processing them through OCR, classification, and extraction. Once exception documents are validated, Forms Recognition exports batch documents to an export folder. The export includes:
   - A TIFF image file for each processed document.
   - An XML file for each processed document, containing values extracted by WebCenter Forms Recognition. For example, XML files for invoices might contain detailed information such as line item values.
Task 1: Configure an Invoices Workspace and Elements

- A CSV file that identifies, on a batch level, the location of image and XML files and key metadata values.

Oracle WebCenter Content: Imaging’s Input Agent imports the CSV, image, and XML files into Imaging.

Typically, image files become viewable in the Imaging Viewer, and each XML data file is stored in Imaging as a supporting document. In Imaging, workflow processing is initiated that processes the XML data.

2.1.1 System Requirements for WebCenter Enterprise Capture 11g Integration

Integrating Oracle WebCenter Enterprise Capture 11g with WebCenter Forms Recognition requires the following components:

- Oracle WebCenter Enterprise Capture 11g Release 1 (11.1.1.8.0 or later)
- Oracle WebCenter Forms Recognition 11g Release 1 (11.1.1.8.0 or later), including a project
- Oracle WebCenter Content: Imaging (referred to as Imaging) 11g Release 1 (11.1.1)

Prerequisites for Invoices Use Case

To work with this use case, you need the following:

- Invoice documents, such as TIFF or PDF files, to import in the client and to attach to email messages.
- An email server account from which to import email messages.
- A location to which to commit files. For testing purposes, this might be a shared folder on your network, such as `\Server\WFR_Projects\AP\Import`.

Note: The instructions in this section assume one invoice per document, which is standard. If you plan to capture multiple invoices contained in one document, see information in Section 2.8 about configuring the Recognition Processor to separate the invoice documents. Each invoice within the multiple invoice document must contain a separator coversheet as its first page, and the coversheet must contain a separator patch code or bar code.

2.2 Task 1: Configure an Invoices Workspace and Elements

Begin by creating the structure and building blocks for the invoices use case. For more information about these tasks, see Oracle Fusion Middleware Managing Oracle WebCenter Enterprise Capture. Perform the steps in this task in the WebCenter Enterprise Capture Workspace Console.

1. Create a workspace.

   Click the **Add** button in the Capture Workspaces pane, and enter a name (for example, **Invoices**). Select the new workspace.

2. On the **Metadata** tab, add a metadata field to pass an organization ID value.

   a. Click the **Add** button in the Metadata Fields table.
   
   b. Enter **Org ID** as the field name.
   
   c. In the **Auto Populate Type** field, select **Default Value**.
d. In the Default Value field that becomes available, enter a value that represents the organization ID for the documents being captured (for example, 204).

e. Click Submit to complete creating the metadata field.

3. On the Classification tab, add a document profile to pass the organization ID metadata value.
   a. Click the Add button in the Document Profiles table.
   b. Enter Invoice Documents in the Name field.
   c. Move the Org ID field you created in the previous step to the Selected Metadata Fields box.
   d. Click Submit to complete creating the document profile.

2.3 Task 2: Configure Client Scanning of Invoices

Configure a client profile that client users can use to scan and import invoices.

1. On the Capture tab, create a client profile by clicking the Add button in the Client Profiles table.

2. Select settings on the General Settings train stop.
   a. In the Profile Type field, select 2 - Capture and Index.
   b. Enter a Profile Name (for example, Invoices).
   c. In the Batch Prefix field, enter a prefix (for example, INV-).

   a. In the Default DPI field, select 300.
   b. Select Convert to Image Format in the Non-Image File Import Action field. This will allow you to import non-image files such as PDF files, and Capture will automatically convert them to image format.
   c. In the DPI field under Non-Image Conversion options, select 300.

   a. In the Document Creation Option field, select 4 - Prompt User.
   b. In the Document Profiles field, select the Invoice Documents profile you created in Section 2.2.
5. On the Security train stop, add yourself to the client profile.

6. On the Post-Processing train stop, select Commit Processor in the Batch Processor field.

7. Click Submit to complete the client profile.

2.4 Task 3: Configure Commit Processing

Follow these steps to configure a text file commit that commits the images to a folder. Because an actual text commit file with metadata values is not needed, you configure the commit profile so it does not create a text file.

1. On the Commit tab, create a commit profile by clicking the Add button in the Commit Profiles table.

2. Specify settings on the General Settings train stop.
   a. In the Commit Profile Name field, enter a name (for example, Commit Invoices).
   b. In the Commit Driver field, select Text File.
   c. In the Document Output Format field, select TIFF Multi-Page.
   d. In the Default Date Format field, enter yyyyMMdd. This is the format that WebCenter Forms Recognition expects.

3. Select the Commit Driver Settings train stop to configure settings specific to text file commits.

4. On the Text File Folder tab, select the Do not create Commit Text File field.

5. On the Document Folder tab, specify a location such as a shared network folder in the Document Folder field. (This is the folder from which WebCenter Forms Recognition will import the committed invoice documents.) Select the Create a folder per committed batch field.
Task 4: Test the Client Profile and Commit Profile

6. On the **Document File Naming** tab, configure how invoice documents are named upon commit.
   
   **a.** Select the **Name document file based on metadata field values** field.
   
   **b.** Move the following fields to the **Selected Fields** box and order them as follows:
   
   - `<Batch ID>`
   - `<Document ID>`
   - Org ID
   - `<Batch Creation Date>`
   
   **c.** In the **Field Delimiter** field, enter an _ (underscore) character.

*Figure 2–3 Commit Profile for Writing Invoice Documents to a Folder*

7. Click **Submit** to save the commit profile.

2.5 Task 4: Test the Client Profile and Commit Profile

Now test the profiles you configured. For more information about client use, see Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture.

1. Sign in to the Capture client.
2. Select the client profile you created (for example, **Invoices**).
3. Capture one or more invoices.
   
   - If scanning invoices, the Document Creation Option window displays each time you scan.
     
     - If scanning one or two page invoices, choose the **One Page** or **Two Pages** option, respectively.
Task 5: Configure Import Processing of Emailed Invoices

If scanning multiple page invoices, include a blank separator page between invoices, and choose the Variable Number of Pages option.

- If importing invoices, select the Create one document per import file option when prompted for an import option. Note that you can import PDF files in addition to TIFF files, because you selected Convert to Image Format in the Non-Image File Import Action field in step 3 in Section 2.3.

4. Review, then release a batch.

Figure 2–4 Use the Capture Client to Test Invoices Client Profile Settings

5. Verify the commit. Click the Refresh Batch List button.
   a. The batch was successfully committed if it was removed from the batch pane list. Open the document folder you specified in the commit profile in Section 2.4 and verify that the documents (but no text file) were committed to the folder.
   b. If the batch remains and displays an error (red x) icon, right-click the document and select Display Batch Errors. For example, an error may have occurred in committing to the shared network folder.

2.6 Task 5: Configure Import Processing of Emailed Invoices

Now that you have configured manual invoice scanning/importing, configure the automated portion of the use case. In this task, configure how invoices attached to email messages are imported and sent for processing.

1. On the Capture tab of your workspace, click the Add button in the Import Processor Jobs table.

2. Complete settings on the General Settings train stop.
   a. In the Import Job Name field, enter a name (for example, Import Invoices).
   b. In the Batch Prefix field, enter a prefix (for example, INV).
   c. In the Import Source field, select Email Source.
   d. In the Import Frequency field, select Every 30 seconds. Then deselect the Online field above. When online, the import processor job monitors the specified inbox folder at the specified import frequency for files to import. When you are ready, you will change the job to Online.
3. Select the **Import Source Settings** train stop and complete settings on the *Email Accounts* tab.
   
   a. In the **Email Server Name** field, enter a DNS name or IP address (for example, `emailserver.example.com`).
   
   b. Click the **Add** button in the Email Accounts to Process table.
   
   c. In the **Email Address** and **Password** fields of the Add/Edit Email Account window, enter an address and password.
   
   d. Click **Verify** to verify the address/password entry. A message displays that the email account connection was successful. Click **OK**.

4. On the **Message Filters** tab, specify the folder to process in the *Folders to Process* field.

   For example, you might specify `inbox/invoices` to import email messages stored in an invoices folder in the email inbox.

   ![Import Processor Job for Importing Invoices Attached to Email Messages](image)

   **Caution:** Be sure to specify a limited folder from which to import. Otherwise, Capture may attempt to process an entire inbox, which could result in unintended consequences.

5. On the **Processing** tab, optionally restrict the type of attachments to be imported.

   By default, the **Include attachments matching these mask(s)** field is set to `*.*` (all attachments are processed). To restrict import to certain file types, enter their extensions. For example, enter `*.TIF;*.PDF` to import all email attachments with a TIF or PDF extension.

6. On the **Post-Processing** tab, leave the default settings selected, which will delete email messages after they are successfully imported but retain email messages that fail import.

7. Click **Submit** to complete creating the import processor job.
8. When ready to begin importing, ensure there are email messages with attached
documents in the specified inbox folder. Select the job in the Import Processor Jobs
table and click the **Toggle Online/Offline** button until the job’s status changes to
Online.

9. Start the Capture client and select the previously created client profile. Wait about
a minute for imported batches to display in the batch pane. If they do not appear,
check your email inbox folder settings.

10. To stop importing, select the job in the Import Processor Jobs table and click the
**Toggle Online/Offline** button until its status displays as Offline.

### 2.7 Task 6: Configure Document Conversion Processing

Invoices in non-image formats (such as PDF) that arrive in Capture attached to email
messages need to be converted to image format to be processed by WebCenter Forms
Recognition. In this task, configure a document conversion processor job to
automatically convert documents from PDF to TIFF format.

1. On the **Processing** tab, click the **Add** button in the Document Conversion Jobs
table.

2. Complete settings on the **Document Selection** train stop.
   a. In the **Name** field, enter a job name (for example, **Convert Non-Images**).
   b. In the **Documents to Convert** field, choose **Selected non-image documents**.
      Enter `*.pdf` in the **File Name Filter** field.

3. On the **Output Format** train stop, select **TIFF: black and white** in the **Output
   Image Format** field.

4. On the **Post-Processing** train stop, select **Commit Processor** in the **Batch Processor
   field under the **When there is no system error** options. This setting will direct
   successfully converted batches to the commit profile.

5. Click **Submit** to complete creating the document conversion processor job.

6. Set the import processor job to direct imported batches to the document
   conversion job.

   Click the **Capture** tab and edit the import processor job. On the **Post-Processing
   train stop, select **Document Conversion Processor** in the **Batch Processor
   field, then select the conversion processor job you created in the **Batch Processor Job
   field. Click **Submit**.

7. Verify the document conversion processor job.

   Ensure there are email messages with attached documents in the specified inbox
folder and change the import processor job’s status to Online. Note that it will take
a little longer for batches to be imported, converted, and committed. Check your
commit folder and confirm that the document files are in TIFF image format.

### 2.8 Task 7: Configure Recognition Processing for Document Separation

If the invoice documents imported as attachments may contain multiple invoices
within a single file, you can configure a Recognition Processor job to separate the
invoice documents, as described in this section. You can skip this section if your
invoice processing configuration will always include one invoice per document.

Below is a summary of this task’s configuration, which includes additional document
conversion and recognition processing steps for separating and organizing multiple
invoice documents. For more information, see Oracle Fusion Middleware Managing Oracle WebCenter Enterprise Capture.

1. Ensure that each invoice within a multiple invoice document that arrives in Capture contains a separator coversheet as its first page, and the coversheet contains a separator patch code or bar code.

2. On the workspace’s Processing tab, create a recognition processor job that includes the following settings.
   - On the Document Processing train stop, configure an invoice coversheet separator page that detects either a patch code or a bar code for separation.
   - Set post-processing to go to the Commit Processor when there is no system error.

3. On the workspace’s Processing tab, edit the document conversion job for this use case.
   - Because the Recognition Processor expects a single image document, you must configure the Document Conversion Processor job to merge all documents into a single document so that the Recognition Processor can organize the documents in the batch.
     - On the Document Merge Options train stop, select the Merge all documents in the Batch Merge Option field.
     - Set the Document Conversion Processor job’s post-processing to go to the Recognition Processor job when there is no system error.

2.9 Task 8: Configure WebCenter Forms Recognition to Process Committed Documents

After completing these tasks, configure WebCenter Forms Recognition to import the committed invoice documents, extract and validate their data, and store the documents in WebCenter Content Imaging. See the WebCenter Forms Recognition documentation listed in Related Documents. For an A/P invoice solution, see the Oracle Fusion Middleware Oracle WebCenter Forms Recognition AP Project Guide.
Configuring WebCenter Forms Recognition Integration with WebCenter Capture 10g

This chapter describes how to configure WebCenter Forms Recognition Integration with WebCenter Capture 10g (also referred to as Oracle Document Capture 10g).

This chapter includes the following sections:

- WebCenter Capture 10g Integration Overview
- Task 1: Configure Capture Index Fields For Autopopulating
- Task 2: Configure the Capture Macro or VBScript
- Task 3: Configure the WebCenter Capture 10g Commit Profile
- Task 4: Configure WebCenter Forms Recognition to Process Committed Documents
- Related WebCenter Capture 10g Integration Documents

3.1 WebCenter Capture 10g Integration Overview

Below are the main steps by which documents are captured, autopopulated, and committed by WebCenter Capture 10g, then imported, processed, and exported by WebCenter Forms Recognition, and finally imported into Imaging.

1. Documents enter Capture via one of several scenarios. Documents can consist of single or multiple pages, and may include a patch code or bar code on their first page.

   For example, users might scan invoices using WebCenter Capture, or vendors might email invoices to an Accounts Payable account. See Section 3.1.1 for configuration scenarios.

2. In WebCenter Capture 10g, documents are separated and index fields are autopopulated.

   Depending on configuration and Capture components used, document separation occurs automatically or by users, who can separate or join documents on-the-fly by pressing a specified keyboard shortcut (hot key).

   Instead of indexing, key values such as a unique reference number (URN) and batch name are typically autopopulated by Capture.

3. Documents are committed from Capture via a text file commit profile.
The commit creates a folder for the batch and outputs each document as a single or multiple page TIFF file, named using its autopopulated values, including its unique reference number.

4. WebCenter Forms Recognition imports the image files from the Capture commit folder and processes them.

It monitors the Capture commit folder, importing image files it finds, parsing their filename metadata, and processing them through OCR, classification, and extraction.

5. WebCenter Forms Recognition exports processed data to an export folder. The export includes:
   - A TIFF image file for each processed document.
   - An XML file for each processed document, containing values extracted by WebCenter Forms Recognition. For example, XML files for invoices might contain detailed information such as line item values.
   - A CSV file that identifies, on a batch level, the location of image and XML files and key metadata values.

6. Oracle WebCenter Content: Imaging’s Input Agent imports the CSV, image, and XML files into Imaging.

Typically, image files become viewable in the Imaging Viewer, and each XML data is stored in Imaging as a supporting document. In Imaging, workflow processing is initiated that processes the XML data.

3.1.1 WebCenter Capture 10g Integration Scenarios

Below are several configurations for capturing invoice documents using WebCenter Capture 10g components.

Centralized Capture Using WebCenter Capture
In this scenario, users use WebCenter Capture to scan invoices centrally. A WebCenter Capture 10g/WebCenter Forms Recognition scan macro allows users to scan, review, and commit images without indexing. For configuration information, see Section 3.3.1.

Distributed Capture Using Import Server (Via Email, MFD, or Fax)
In this scenario, invoices are received through any of these methods:
   - via an email alias, such as AP@example.com
   - scanned remotely using an MFD (Multi-Function Device) to a network folder
   - transferred by fax to a network folder

In each case, WebCenter Capture’s Import Server monitors the folder or email alias inbox and imports the documents using settings stored in the WebCenter Capture 10g/WebCenter Forms Recognition Import Server macro. Key values are autopopulated, and Commit Server commits the invoices to a folder for WebCenter Forms Recognition import. For configuration information, see Section 3.3.2.

Distributed Capture Using WebCenter Distributed Capture
In this scenario, users use WebCenter Distributed Capture to scan invoices at remote locations, which are then sent for committing via Commit Server and centralized processing. A WebCenter Capture 10g/WebCenter Forms Recognition VBScript assigns each document its unique reference number. For configuration information,
3.1.2 Overview of WebCenter Capture 10g Integration Tasks

Configuring a WebCenter Capture 10g/WebCenter Forms Recognition integration involves the following key tasks:

1. Configure Capture index fields to be autopopulated. These values will be committed with images via their filenames. See Task 1: Configure Capture Index Fields For Autopopulating.

   **Note:** If you imported a file cabinet configuration using the Capture Import/Export utility as part of a solution, these index fields may already be configured.

2. Configure settings in the Capture scan macro and scan profile, Import Server macro and batch job, or WebCenter Distributed Capture VBScript and scan profile. See Task 2: Configure the Capture Macro or VBScript.

3. Configure the WebCenter Capture commit profile.

   The commit profile must be configured using the commit text file driver and set to commit documents to a network folder that WebCenter Forms Recognition monitors. See Task 3: Configure the WebCenter Capture 10g Commit Profile.

4. Configure WebCenter Forms Recognition to import the document image files, as described in the WebCenter Forms Recognition documentation. See Task 4: Configure WebCenter Forms Recognition to Process Committed Documents.

3.1.3 System Requirements for WebCenter Capture 10g Integration

Integrating WebCenter Capture 10g with WebCenter Forms Recognition 11g requires the following components:

- WebCenter Capture 10g Release 3 (10.1.3.5.0 or later)
- WebCenter Distributed Capture 10g Release 3 (10.1.3.5.0 or later); required for remote scanning only
- WebCenter Forms Recognition 11g Release 1 (11.1.1.8.0 or later), including a project
- Oracle WebCenter Content: Imaging (referred to as Imaging) 11g Release 1 (11.1.1)
- Capture/WebCenter Forms Recognition macros and VBScript, contained in the ..\Projects\AP\Capture Integration subfolder in the WebCenter Forms Recognition installation folder.

3.2 Task 1: Configure Capture Index Fields For Autopopulating

To commit batches, index values are autopopulated in Capture. A scanned or imported document’s index values are then passed to WebCenter Forms Recognition via its filename. Autopopulating and passing the index values requires these main steps:

- Add the index fields in Capture as described in this section.
- When configuring the Capture text commit profile, select each Capture field on the Document File Naming tab to pass it to WebCenter Forms Recognition via an image file name, as described in Section 3.4.
In the WebCenter Forms Recognition INI file (IMP section), identify these fields’ position so WebCenter Forms Recognition can properly parse the file name into fields. See the WebCenter Forms Recognition documentation for more information.

Table 3–1 lists Capture fields available for autopopulating by the macros. Note that the URN field, which will contain the document’s unique reference number generated automatically by the macro or VBScript, is required.

### Table 3–1 Capture Fields for Autopopulating

<table>
<thead>
<tr>
<th>Capture Field</th>
<th>Values</th>
<th>Required or Optional</th>
<th>How Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>URN</td>
<td>Data Type: Alphanumeric</td>
<td>Required</td>
<td>Unique identifier that must be passed through to WebCenter Forms Recognition upon commit.</td>
</tr>
<tr>
<td></td>
<td>Max Value: 32</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Batch Name</td>
<td>Data Type: Alphanumeric</td>
<td>Optional</td>
<td>Pass through the batch name, for tracking purposes.</td>
</tr>
<tr>
<td></td>
<td>Max Value: 25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scan Date</td>
<td>Date Type: Date</td>
<td>Optional</td>
<td>Pass through the scan date, for tracking purposes.</td>
</tr>
<tr>
<td>Other default fields to autopopulate, such as Organization, CompanyCode, or DepartmentCode</td>
<td>Data Type: Alphanumeric</td>
<td>Optional</td>
<td>Pass through standard values, such as organization, or company or department code.</td>
</tr>
</tbody>
</table>

Follow these steps to add key index fields to Capture.

1. In Capture Administration, select File Cabinets from the Admin menu.
2. In the tree, select the file cabinet to which to add index fields.
3. Click Add. Complete fields in the Add New Index Field dialog box.
4. Create fields as listed in Table 3–1.

### 3.3 Task 2: Configure the Capture Macro or VBScript

This section covers the following topics:

- Section 3.3.1, "Configure the Capture Scan Macro"
- Section 3.3.2, "Configuring the Import Server Macro"
- Section 3.3.3, "Configuring the WebCenter Distributed Capture VBScript"

#### 3.3.1 Configure the Capture Scan Macro

The scan macro enables users to scan and commit batches directly to a WebCenter Forms Recognition import folder, without requiring the use of the WebCenter Capture Index component.

**About Document Separation With the Scan/Commit Macro**

When batches include multiple page documents, you must configure how Capture identifies the start of new documents.
You can configure document separation using the following methods:

- Physically include a printed patch code or bar code on a page and specify it for detection in the scan profile. WebCenter Capture searches for a patch code or the specified bar code during batch scanning, and if found, applies the virtual patch code specified in the macro (II, III, or T). If no patch or bar codes are detected during scanning, the scan macro assumes that the batch is comprised of single page documents.

- Include blank separator sheets between documents and specify a Blank Page size threshold in the scan macro. Pages whose size is less than this setting are considered blank and treated as document separators, as if a patch code were physically printed on them.

- Allow users to assign a virtual patch code to any page during document review, by pressing a hot key that switches between starting a new document (if no patch code is applied) or joining the document with the previous document (if a patch code has been applied).

**Importing the Scan/Commit Macro**

Follow these steps to import the scan/commit macro into WebCenter Capture.

1. Locate the scan macro for your configuration. See Section 3.1.3.

   Two versions of the scan macro are provided:
   
   - WFR-Scan-ISIS-Macro.bas, for use with Scan for ISIS
   - WFR-Scan-Adrenaline-Macro.bas, for use with Scan for Adrenaline

2. In WebCenter Capture, import the WebCenter Forms Recognition scan macro.
   
   a. From the System menu, select **Manage Macros**.
   
   b. In the Category field of the Manage Macros screen, select **Scan for ISIS** or **Scan for Adrenaline**.
   
   c. Click the **Import** button on the toolbar.
   
   d. In the Import Macro File dialog box, select the appropriate macro (.bas) file. Add an optional description and click **OK**.

   The imported scan macro is listed for the selected category.

3. Close the Manage Macros screen.

**Configuring Scan/Commit Macro Settings**

After importing the scan macro, follow these steps to configure its settings.

1. In the Manage Macros screen of WebCenter Capture, select the scan macro from the list of macros and click the **Setup** button on the toolbar.

2. In the Scan/Commit Macro Settings screen shown in Figure 3–1 and described in Table 3–2, specify commit batch settings.
   
   a. Specify if batches are to be committed directly after scanning or if users will review, edit, and commit them.
   
   b. Specify how multiple page documents are identified and separated within batches. Also specify if users can create or join documents when reviewing and if separator sheets should be retained in documents.
   
   c. Specify how document files are to be autopopulated, by identifying the Capture index fields you created in Section 3.2, "Task 1: Configure Capture
Index Fields For Autopopulating.”

3. Click OK.

Figure 3–1  WFR Scan Macro Settings

Table 3–2  Scan/Commit Macro Settings Screen

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Separation Settings</td>
<td></td>
</tr>
<tr>
<td>Patch Code</td>
<td>Select a patch code to be applied virtually to identify the start of new documents. Choose from the following patch codes: Patch II, Patch III, and Patch T.</td>
</tr>
<tr>
<td>Set Patch Code Using</td>
<td></td>
</tr>
<tr>
<td>Interactive Hot Key</td>
<td>Optionally specify a hot key that users can press for the selected page when reviewing batches. Pressing the hot key either:</td>
</tr>
<tr>
<td></td>
<td>■ inserts a virtual patch code if none was detected, starting a new document.</td>
</tr>
<tr>
<td></td>
<td>■ removes detection of a previously detected patch code or removes a previously applied virtual patch, merging the selected document with its previous document.</td>
</tr>
<tr>
<td></td>
<td>Note: This interactive hot key option requires that the Prompt User Upon Closing Review option be selected, which allows users to edit and review batches after scanning.</td>
</tr>
</tbody>
</table>
Task 2: Configure the Capture Macro or VBScript

### Bar Code Value
To identify new documents by bar code during batch scanning, enter the bar code value to detect. In the scan profile, configure the bar code type and detection method. When a barcode of this value is detected on a page, the specified virtual patch code is applied.

**Note:** Detected bar code values are used for document separation only. The value cannot be passed via Capture as an index value.

### Blank Page
To identify new documents by blank separator pages, enter the byte threshold at which to detect a blank page. Any page of a size less than this setting is considered blank and is used as a document separator, as if a patch code is physically printed on it.

A value of zero indicates that this setting is not in use. You may need to experiment with this setting as file size varies with resolution. The recommended starting value is 3000 bytes.

### Include Separator Pages in Documents
Select this option to retain pages on which a patch code or bar code is detected. By default, this setting is deselected. Note that blank pages detected as document separator sheets are automatically removed from documents.

If patch codes or bar codes are present on otherwise blank pages, leave this field deselected so that separator sheets are removed from documents.

### User Prompt Field 1
Define a prompt field linked to a defined Capture picklist. If you specify a prompt in these fields and/or under **User Prompt Field 2** options, a dialog box displays when users close the batch review window or immediately after they scan, depending on the **Index Documents** field selection. This dialog box requires the user to select a value from the picklist, then populates the specified Capture field with the selected value for all documents in the batch.

### Picklist
Select the picklist from which users will be required to select an index value. Note that this picklist must exist in the Capture file cabinet.

### Field Name
Enter the name of the Capture index field to which to apply the selected picklist value.

Note that you must enter this field name as it is defined in the Capture file cabinet. Validation does not occur until commit.

### Index Documents

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Prompt User Upon Closing Review</strong></td>
<td>After scanning, allow users to review and edit document batches before committing them. When selected, users are prompted to commit batches when they close the review window.</td>
</tr>
<tr>
<td><strong>Automatically After Scanning</strong></td>
<td>Commit each batch immediately after the user has scanned it, without allowing the user to review and edit its documents.</td>
</tr>
<tr>
<td><strong>Batch Status</strong></td>
<td>Specify a status to assign to batches upon commit (optional).</td>
</tr>
</tbody>
</table>

### Auto-Populate Fields
Task 2: Configure the Capture Macro or VBScript

| Table 3–2  (Cont.) Scan/Commit Macro Settings Screen |
|---------------------------------|--------------------------------------------------|
| **Element**                     | **Description**                                  |
| Unique Reference Number         | Enter the Capture index field (created in Section 3.2) to contain the document’s unique reference number. This number will uniquely name document files upon their commit into the Capture commit/WebCenter Forms Recognition import folder. The scan macro generates this number automatically. This field is required. When configuring the text commit profile (described in Section 3.4), select this field on the Document File Naming tab to pass this unique image identifier to WebCenter Forms Recognition via image file name. **Note:** Enter the index field name exactly as it exists in Capture Administration, including case. |
| Batch Name                      | Enter the Capture index field (created in Section 3.2) to contain the batch’s name. This field is optional and needed only to include the batch name as part of document names. To pass this batch name to WebCenter Forms Recognition via image file name, select this field on the Document File Naming tab when configuring the text commit profile, as described in Section 3.4. Enter the index field name exactly as it exists in Capture Administration, including case. |
| Default Values                  | Define one or more static values to pass to WebCenter Forms Recognition via image file name. Separate multiple field definitions with a ; (semi-colon). For example, you might include the following default value to pass an organization’s ID to WebCenter Forms Recognition: CompanyCode=2222 |
| Scan Date                       | To pass the scan date to WebCenter Forms Recognition via image file name, enter the Capture index field (created in Section 3.2) to contain the batch’s scan date. This field is optional and needed only to include the scan date as part of document names. To pass this scan date to WebCenter Forms Recognition via image file name, select this field on the Document File Naming tab when configuring the text commit profile, as described in Section 3.4. |
| Format                          | Select the date format to use. |
| User Prompt Field 2             | Define a prompt field linked to a defined Capture picklist. If you specify a prompt in these fields and/or under User Prompt Field 1 options, a dialog box displays when users close the batch review window or immediately after they scan, depending on the Index Documents field selection. This dialog box requires the user to select a value from the picklist, then populates the specified Capture field with the selected value for all documents in the batch. |
| Picklist                        | Select the picklist from which users will be required to select an index value. Note that this picklist must exist in the Capture file cabinet. |
Task 2: Configure the Capture Macro or VBScript

Configuring WebCenter Forms Recognition Integration with WebCenter Capture 10g

3.3 Configuring the Scan/Commit Macro

1. In WebCenter Capture, choose Manage Scan Profiles from the Scanning menu, and select a scan profile.
2. Select General options.
3. In the Macro Name field, select the macro you configured (WFR-Scan-ISIS-Macro or WFR-Scan-Adrenaline-Macro).
4. To detect a patch code or bar code during scanning, configure detection in the scan profile. For more information, see the Administrator’s Guide for Oracle Document Capture.
5. Save the scan profile. Close the Manage Scan Profiles screen.

Handling Multiple Scan/Commit Macro Configurations

If you need to provide users with multiple scan/commit configuration options, follow these steps to import additional instances of the scan macro and configure them separately. For example, if users are processing batches that use different document separation methods, you will need to create multiple scan profiles that utilize different macro settings.

1. Save the scan/commit macro (.bas) file under a new name.
2. In the Manage Macros screen, import the scan/commit macro you just saved.
3. Select the macro, click Setup, and configure this new instance of the macro with alternate settings.
4. In the Manage Scan Profiles screen, create a new scan profile and select the new macro in the Macro Name field under General options.

3.3.2 Configuring the Import Server Macro

The Import Server macro enables importing and committing documents to a WebCenter Forms Recognition import folder without using the Index component.
Task 2: Configure the Capture Macro or VBScript

**About Document Separation With the Import Server Macro**

With this macro, you identify to Import Server how imported files are comprised (one document, single page documents, or multiple page documents). If a file includes multiple page documents (for example, a single PDF file containing documents with multiple pages that are separated with a blank page), you must configure how Capture identifies the start of new documents, by specifying a patch code to be applied and a blank page byte threshold for detection.

---

**Note:** The Import Server does not support patch code or bar code recognition. Therefore, this macro depends upon a blank page for multiple page document separation.

---

**Importing the Import Server Macro**

Follow these steps to import the Import Server macro.

1. Locate the WFR-Import-Server-Macro.bas file. 
   See Section 3.1.3.

2. In the Import Server, import the WebCenter Forms Recognition macro.
   a. From the Setup Menu, select **Macro Manager**.
   b. In the **Category** field of the Manage Macros screen, select **Oracle Document Capture Import Server**.
   c. Click the **Import** button on the toolbar.
   d. In the Import Macro File screen, select the WFR-Import-Server-Macro.bas file. Add an optional description and click **OK**.

   The imported macro is listed.

3. Close the Macro Manager screen.

**Configuring Import Server Macro Settings**

After importing the Import Server macro, follow these steps to configure its settings.

1. In the Macro Manager screen of Import Server, select **Oracle Document Capture Import Server** from the **Category** field.

2. Select the Import Server macro and click the **Setup** button on the toolbar.

3. In the Import Server/WebCenter Forms Recognition Macro Settings screen shown in Figure 3–2 and described in Table 3–3, specify commit batch settings.
   a. Specify how files are comprised: of one document, single page documents, or multiple page documents.
   b. For multiple page documents, specify the blank page byte threshold at which to detect blank pages and the virtual patch code value to set.
   c. Specify how document files are to be autopopulated, by identifying the Capture index fields created in Section 3.2.

4. Click **OK**.
Task 2: Configure the Capture Macro or VBScript

Figure 3–2 Import Server/WebCenter Forms Recognition Macro Settings

![Import Server/WebCenter Forms Recognition Macro Settings](image)

Table 3–3 Import Server/WebCenter Forms Recognition Macro Settings

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Contains</td>
<td>Specify how imported files are comprised:</td>
</tr>
<tr>
<td></td>
<td>- One document only</td>
</tr>
<tr>
<td></td>
<td>- Single page documents</td>
</tr>
<tr>
<td></td>
<td>- Multiple page documents</td>
</tr>
<tr>
<td></td>
<td>If a file contains multiple documents, also specify document separation options, which require a blank separator page.</td>
</tr>
<tr>
<td>Document Separation Settings</td>
<td></td>
</tr>
<tr>
<td>Patch Code</td>
<td>For multiple page documents, select a patch code to be applied virtually to identify the start of new documents. This setting specifies the patch code attribute to apply to the page if a blank page is detected.</td>
</tr>
<tr>
<td></td>
<td>Choose from the following patch codes: Patch II, Patch III, and Patch T.</td>
</tr>
<tr>
<td>Blank Page</td>
<td>To identify the start of new documents by blank separator pages, enter the byte threshold at which to detect a blank page.</td>
</tr>
<tr>
<td></td>
<td>Any page consisting of a file size less than this setting is considered blank and is used as a document separator, as if a patch code is physically printed on it. Blank pages are not included in the document.</td>
</tr>
<tr>
<td></td>
<td>A value of zero indicates that this setting is not in use. You may need to experiment with this setting as file size varies with resolution. The recommended starting value is 3000 bytes.</td>
</tr>
<tr>
<td>Batch Status</td>
<td>Specify a status to assign to batches upon commit (optional).</td>
</tr>
<tr>
<td></td>
<td>This is particularly useful when batches are not being exported directly to WebCenter Forms Recognition, but may require review within WebCenter Capture. For example, batch statuses might include Requires Review or Waiting for Commit Server.</td>
</tr>
</tbody>
</table>

Auto Populate Fields
Configuring the Import Server Batch Job

After configuring the macro’s settings, follow these steps to associate it with an Import Server batch job.

1. In Import Server, create or open a batch job by selecting **Batch Jobs** from the Setup menu. For example, create an email or folder-type batch job.

2. In the **Server Macro** field on the General tab, select the Import Server macro you configured.

3. If you configured blank page separation in the macro, select the **Processing** tab and select **Skip page** in the **If invalid page found or timeout occurs** field.

4. Under Commit Options on the Processing tab, select the **Commit Batches** field. Typically, you would also select the **Use Commit Server** field to off load processing to Commit Server. (Note that batches may also appear in WebCenter Capture while waiting for Commit Server to process them.)
To route batches to WebCenter Capture, leave the Commit Batches field deselected.

5. Save the batch job and use the Scheduler to schedule the job to be run.

### 3.3.3 Configuring the WebCenter Distributed Capture VBScript

The VBScript’s task is to autopopulate the URN (Unique Reference Number) for documents. Follow these steps to configure the script and a scan profile for the integration.

1. Locate the WebCenter Forms Recognition script file (WFR-ODDC-AssignURN.vbs) and save it to the ...\Document Capture\WebPages\Scripts folder. See Section 3.1.3.

2. Open the script and search for the constant conURNField. Set its value to match the index field you added in Section 3.2 to contain the unique reference number for each document (for example, URN).

   Once configured, the script assigns a system generated unique reference number to this URN field before the batch is sent.

3. In WebCenter Distributed Capture administration, create or open a scan profile for scanning or importing documents for WebCenter Forms Recognition.

4. In the Scanning Type field under General options, select a scanning type that allows indexing: either 2 - Scan and Index Documents or 3 - Scan and Index Batches. (The script does not work if the scanning type is set to 1 - Scan Only.)

5. In the Profile Script field, select the WebCenter Forms Recognition script.

6. Under Auto Populate options, configure other fields (created in Section 3.2) to be autopopulated. For example, you might autopopulate scan date, batch name, and a default value such as an organization code.

### 3.4 Task 3: Configure the WebCenter Capture 10g Commit Profile

After configuring how documents enter Capture, follow the steps below to configure how images and metadata are committed so WebCenter Forms Recognition can import and process them. You do this by configuring a text file-type commit profile to output images as multi-page TIFF files for import into WebCenter Forms Recognition.

1. In Capture Administration, create a commit profile.
   a. From the Admin menu, choose File Cabinets and select the file cabinet.
   b. Choose Commit Profiles in the left pane and click the New (sun) button from the toolbar. Enter a name for the profile and click OK.

2. In the Document Output field, select TIFF - Multiple Page. (Select this output format even if scanning single page documents.)

3. In the Commit Driver field, select Commit Text File. Click its adjacent Configure button.

4. Select settings on the General tab, as shown in Figure 3–3.
   a. In the Commit Text File Settings screen, select the Do not create Commit Text File field.
b. In the **Document Folder** field, click **Browse** and specify the folder to which to commit images for import by WebCenter Forms Recognition.

**Note:** Ensure that this path matches the path to the WebCenter Forms Recognition project’s Import folder.

c. Select the **Create a folder per committed batch** option.

*Figure 3–3 Commit Text File Settings, General Options*

5. On the Document FileNaming tab (shown in *Figure 3–4*), map all Capture autopopulated fields to pass to WebCenter Forms Recognition in image filenames.
   a. Select the **Name document file based on index values** field.
   b. Select the Unique Reference Number field you created (for example, URN) from the **Available Fields** list and move it to the **Selected Fields** list.
   c. Map other fields you configured (for example, Organization, ScanDate, or the system field <Batch ID>), by selecting them in the **Available Fields** list and moving them to the **Selected Fields** list.
   d. Enter an underscore (_) in the **FieldDelimiter** field.
For example, the following image file might be named as follows:

```
12_FC7C58E4E9934A82A2073571A96BB77C_1733_15122010.TIF
```

where:

- **12** identifies the WebCenter Capture batch ID, useful for batch auditing in WebCenter Capture’s audit table.
- **FC7C58E4...** identifies the document’s unique reference number, populated by the macro or VBScript.
- **1733** identifies the organization code, autopopulated as a default value
- **15122010** identifies the scan date.

6. Activate the commit profile by selecting **Commit Profiles** in the left pane and selecting the profile.

### 3.5 Task 4: Configure WebCenter Forms Recognition to Process Committed Documents

After completing these tasks, configure WebCenter Forms Recognition to import the committed invoice documents, extract and validate their data, and store the documents in WebCenter Content Imaging. See the WebCenter Forms Recognition documentation listed in Section 3.6. For an A/P invoice solution, see the Oracle WebCenter Forms Recognition AP Project Guide.

### 3.6 Related WebCenter Capture 10g Integration Documents

See the following documents for information related to a WebCenter Forms Recognition/WebCenter Capture 10g integration.

**WebCenter Capture/WebCenter Distributed Capture**
- *Administrator’s Guide for Oracle Document Capture*
- *Administrator’s Guide for Oracle Distributed Document Capture*
Oracle WebCenter Forms Recognition

- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Installation Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition AP Project Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Runtime Server User’s Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Designer User’s Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Verifier User’s Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Web Verifier User’s Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Scripting User’s Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition Product Migration Guide
- Oracle Fusion Middleware Oracle WebCenter Forms Recognition AP Project Migration Guide

WebCenter Content: Imaging