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WebCenter Forms Recognition Tools Guide

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Provides information on using WebCenter Forms
Recognition tools

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WebCenter Forms Recognition Tools

The Tools guide provides documentation for the following tools.

- [Project Merge Tool](#)
- [Page Designer](#)
- [Workdoc Browser](#)
- [Merge SLW Learn Sets](#)
- [SLW Export Local Project Tool](#)

Project Merge Tool

About the Project Merge Tool

The **Project Merge Tool** (PMT) is designed to handle large **WebCenter Forms Recognition** projects. It allows multiple users to work independently on separate copies of a project file.

Users can then merge project objects, such as classes, into one project.

The tool enables to transfer the following objects from one **WebCenter Forms Recognition** project to another.

- Classes, along with the associated objects, verification forms, pages, and scripts, as well as templates and learn sets.
- Verification forms
- Zones
- Anchors
- Pages (the collection of zones and anchors for a class)
- Scripts, both project and class level

Prerequisites

- The **Project Merge Tool** requires that you have installed **WebCenter Forms Recognition 12.2.1.3** or later.
- Each project you want to access with the tool must have database authentication enabled.

For more information, see "Allow Database authentication" in the *Oracle WebCenter Forms Recognition Designer User's Guide*.

Specify the Database Connection String

To specify the database connection string, complete the following steps.

1. Open **DstPmt.exe.config** in a text editor.
2. Search for the `<connectionStrings>` element.
3. For an ORACLE database, modify the following values.
 - Set `Data Source`.
 - Set `User ID` to the service account user ID.

- Set Password to the service account password.

Example

```
<connectionStrings>

<add name="Entities"
connectionString="metadata=res://*/Entity.ORAEntities.csdl|res://*/Entity.ORAEntities.ssd|res://*/Entity.ORAEntities.msl;
provider=EFOracleProvider; Provider Connection String='Data
Source=<OracleServerName\InstanceName>;User
ID=<UserID>;Password=<UserPassword>' "
providerName="System.Data.EntityClient" />

</connectionStrings>
```

4. For a SQL Server database, modify the following values.

- Set Data Source.
- Set Initial Catalog to the SQL Server database catalog.
- Set User ID to the SQL Server user ID.
- Set Password to the SQL Server password.

Example

```
<connectionStrings>

<add name="Entities"
connectionString="metadata=res://*/Entity.Entities.csdl|res://*/Entity.Entities.ssd|res://*/Entity.Entities.msl;
provider=System.Data.SqlClient;provider connection string="Data
Source=<DataSource>;Initial
Catalog=<SQLServerDatabaseCatalog>;Integrated Security=false;User
ID=<UserId>;Password=<UserPassword>;MultipleActiveResultSets=True&quot;
;" providerName="System.Data.EntityClient" />

</connectionStrings>
```

5. Save and close the file.

Load Projects

To log on and load projects, complete the following steps.

1. Launch **DstPmt.exe**.
2. In the **WebCenter Forms Recognition Project Logon** dialog box, type your user name and password and then click **OK**.

Note: The user must be available in the WebCenter Forms Recognition database and have **ADM** role. PMT does not support either project users or Windows Authentication.

For more information, see "Export users and groups to the WebCenter Forms Recognition database" in the *Oracle WebCenter Forms Recognition Designer User's Guide*.

3. In the **Select projects** dialog box, in the **Source project** field, type or browse to the source project.

4. In the **Target project** field, type or browse to the target project and then click **Load**.
The structure of the two projects is displayed in the **Project Data Transfer** window.
5. Optional. To load a different project, in the source or target **File** field, type or browse to the required project.

Deactivate Automatic Backups

The **Automatic backup** option is activated by default.

When the user modifies a project, the tool writes a backup of the project file and learn set in a subdirectory of the project directory named as follows.

```
PMT Backup [project name] [YYYY-MM-DD HH-MM-SS] [computer name] [userid]
```

To deactivate automatic backups, on the **File** menu, click **Automatic backup**.

Transfer Objects Between Projects

You can transfer objects from the source to the target project and vice versa.

To transfer an object from one project to the other, complete the following steps.

1. In the **Project Merge Tool** window, complete one of the following substeps.
 - Select one or more classes and drag them to the **Classes** node in the other project pane.

Notes:

- Any child classes of a transferred class will be transferred as well.
 - If you drag to an existing class within the **Classes** node, the transferred class will be created as a child of this class.
 - Any templates used by the transferred class are transferred as well. However, if there is an existing template in use with the same name, the existing template will be kept and applied to the transferred class.
 - If the name of a transferred class conflicts with the name of an existing class, you will be given the option to either rename the transferred class or replace the existing one.
- Select one or more objects and drag them to the respective node in the other project pane.

Notes:

- If you drag an object to an invalid target, no notification is displayed.
- If the name of a transferred object conflicts with the name of an existing object, you will be given the option to either rename the transferred object or replace the existing one.
- The tool does not verify if a transferred verification form is compatible with the target class.

The transferred objects are displayed in bold.

2. Click **Save**.
3. Review the status bar for messages.
4. Optional. Review the `[YYYYMMDD]_DstPmt_*.log` file in the `C:\Program Files (x86)\Oracle\WebCenter Forms Recognition\bin\Log`

directory.

5. If you transferred classes, open the modified project in **Designer**, relearn, and then save the project.

Display a Script

To display a script, double-click the script object.

The script opens in a new window for review.

Note: You cannot save any changes to the script. To modify a script, open the project in Designer.

Display Format Analysis Engine Settings

To display the **Format Analysis Engine** settings, double-click the Format Analysis Engine object.

The settings open in a new window for review.

Note: You cannot save any changes. To modify the settings, open the project in Designer.

Run the Tool Using Windows Command Line

You can transfer objects between projects using Windows Command Line interface.

Syntax

```
DstPmt login [UserName]#[password] [ObjectType] [operation]
[SourceProjectName].sdp#[ObjectName] [TargetProjectName].sdp#[ObjectName]
```

Note: If no password was assigned to the user, you can leave the password parameter blank.

In Windows Command Line interface, complete any of the following steps.

- To copy a class, type the following command.

```
DstPmt login [UserName]#[password] class copy [SourceProjectName].sdp#
[ClassName] [TargetProjectName].sdp#[ClassName]
```

Example

```
DstPmt login ADM#PWD class copy SourceProject.sdp#Invoices1
TargetProject.sdp#Invoices2
```

- To copy a class without specifying the target class, type the following command. This command adds the source class to the base classes in the target project.

```
DstPmt login [UserName]#[password] class copy [SourceProjectName].sdp#
[ClassName] [TargetProjectName].sdp
```

Example

```
DstPmt login ADM#PWD class copy SourceProject.sdp#Invoices1
TargetProject.sdp
```

- To copy a form to a class in the target project, type the following command.

```
DstPmt login [UserName]#[password] form copy [SourceProjectName].sdp#
[FormName] [TargetProjectName].sdp#[ClassName]
```

Example

```
DstPmt login ADM#PWD form copy SourceProject.sdp#InvoiceForm
TargetProject.sdp#Invoices2
```

- To copy a zone, type the following command.

Note: SourceProjectName and TargetProjectName project can be the same.

```
DstPmt login [UserName]#[password] zone copy [SourceProjectName].sdp#
[PageName]#[ZoneName] [TargetProjectName].sdp#[PageName]
```

Example

```
DstPmt login ADM#PWD zone copy SourceProject.sdp#PageName#ZoneName
TargetProject.sdp#PageName
```

- To copy an anchor, type the following command.

Note: SourceProjectName and TargetProjectName project can be the same.

```
DstPmt login [UserName]#[password] anchor copy
[SourceProjectName].sdp#[PageName]#[AnchorName]
[TargetProjectName].sdp#[PageName]
```

Example

```
DstPmt login ADM#PWD anchor copy SourceProject.sdp#PageName#AnchorName
TargetProject.sdp#PageName
```

- To replace a page, type the following command.

Note: SourceProjectName and TargetProjectName project can be the same.

```
DstPmt login [UserName]#[password] page replace
[SourceProjectName].sdp#[PageName] [TargetProjectName].sdp#[PageName]
```

Example

```
DstPmt login ADM#PWD page replace SourceProject.sdp#PageName
TargetProject.sdp#PageName
```

- To replace a script, type the following command.

Note: SourceProjectName and TargetProjectName project can be the same.

```
DstPmt login [UserName]#[password] script replace
[SourceProjectName].sdp#[ScriptName] [TargetProjectName].sdp#
[ScriptName]
```

Example

```
DstPmt login ADM#PWD script replace SourceProject.sdp#ScriptName
TargetProject.sdp#ScriptName
```

Page Designer

About Page Designer

Page Designer provides an overview about the zones defined for each class and the recognition engines used. Furthermore, the tool enables you to quickly review reading zones for OCR, OMR and Barcode recognition and to easily experiment with the zone properties.

Note: Use this tool for testing purposes only and never save any changes. This might corrupt the project.

Page Designer User Interface

The left pane displays the classes, their zones and the used engines.

The right pane displays the images.

Load an Image

To load an image, complete the following steps.

1. Click **File > Open Image**.
2. In the **Select Image file** dialog box, browse to the required directory, select a file and then click **Open**.
3. Optional. Use the buttons on the toolbar to adjust the view to your needs.

Load an Image List

To load an image list, complete the following steps.

1. Click **File > Open Image List**.
2. In the **Select Image List** dialog box, under **Imagepath Settings**, complete the following substeps.
 1. Browse to the required directory.
 2. Select the file type.
3. Complete one of the following substeps.
 - From the **Available images** list, select the images you want to load and then click **Add**.
 - To load all images listed in the **Available images** list, click **Add all**.
4. Click **OK**
5. Optional. Use the buttons on the toolbar to adjust the view to your needs.

Create a Project

Do not create projects with Page Designer, this function is no longer in use.

Load a Project

To load a project, complete the following steps.

1. Click **File > Load Project**.
2. In the **Load project file** dialog box, browse to the required directory.
3. From the **File Type** list, select **WebCenter Forms Recognition Project File (*.sdp)**.
4. Select the project and then click **Open**.

About Version Control

The Page Designer version control feature is no longer in use.

Display Information About the Image

To display path, resolution, size, bits per pixel, and color of the image, complete the following step.

- Click **Image > Image Info**.

About Reading Zones

For information about reading zones, see "About reading zones" and "About the Zone Analysis Engine" in the *Oracle WebCenter Forms Recognition Designer User's Guide*.

Create a Reading Zone

To create a reading zone, complete the following steps.

Note: Never save your changes in Page Designer, any modifications must be applied in Designer.

1. Complete the following options as needed.
 - To create an OCR reading zone, click the **Insert OCR zone**  button.
 - To create an OMR reading zone, click the **Insert OMR zone**  button.
 - To create a bar code reading zone, click the **Insert barcode zone**  button.
2. On the document, drag to mark the required zone.

Note: The zone must be large enough to hold the expected content, but not much larger.

Adjust a Reading Zone

To adjust a reading zone, complete any of the following steps.

- Drag the zone to another place.
- Resize the zone by dragging the corner handles.
- To adjust the zone size to the size of the entire page, right-click the zone and then click Fit to image size.
- To delete a zone, select the zone and then press Del.

Modify the Zone Properties

To modify the zone properties, complete the following steps.

1. In the image pane, right-click a zone and then click **Properties**.
2. In the **Zone Properties** dialog box, modify the settings.

Note: For more information, see "Zone-level recognition settings" in the *Oracle WebCenter Forms Recognition Designer User's Guide*.

About Anchors

For information about anchors, see "About Anchors" in the *Oracle WebCenter Forms Recognition Designer User's Guide*.

Create an Anchor

To create an anchor, complete the following steps.

1. Click the **Anchor**  button.
2. On the document, drag to mark the anchor zone.

Note: Ensure that the anchor zone is proportional to the geometric feature that you want to locate. For example, if all the documents in your class contain a 50 mm line in the footer area, your anchor should not have a side length of 5 or 250 mm. The anchor position should be close to the geometric feature you want to use.

3. Optional. To create more anchors, repeat the previous steps.

Modify the Anchor Properties

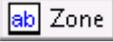
To modify the anchor properties, complete the following steps.

1. In the image pane, right-click the anchor and then click **Properties**.
2. In the **Anchor Properties** dialog box, modify the properties.

Note: For more information, see "Modify the anchor properties" in the *Oracle WebCenter Forms Recognition Designer User's Guide*.

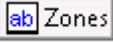
Read a Zone

To read a zone, complete the following steps.

1. Browse to the required image.
2. On the image, select a zone.
3. Click the **Read active zone**  button.
4. In the **Zone** dialog box, observe the result.

Read all Zones on an Image

To read all zones on an image, complete the following steps.

1. Browse to the required image.
2. Click the **Read all zones**  button.
3. In the **Recognition Result** dialog box, observe the result.

Read all Zones on all Images

To read all zones on all images, complete the following steps.

1. Click the **Read zones at all images**  button.
2. In the **Recognition Result all** dialog box, observe the result.
3. Optional. To save the result in a text file, complete the following substeps.
 1. Click **Save**.
 2. In the **Save Textfile** dialog box, in the **File name** field, type a name and then click **Save**.

Workdoc Browser

About Workdoc Browser

Workdoc Browser enables you to review the workdoc data gained during processing, such as the found words and text blocks, the content of fields and their properties.

This may help you to investigate errors, OCR problems, or to examine properties you want to use in scripting.

Furthermore, you can review the whole structure of the documents storage base such as batches, folders, and workdocs. You can operate with the batches of documents by filtering and sorting them and to create copies of the documents or batches of documents. It can be especially helpful for example at reviewing or reproducing issues in the document processing results.

Workdoc Browser User Interface

The user interface provides the following panes.

- The upper left pane displays the directories on the file system or the jobs and batches from the database, depending on the selected view.
- The lower left pane displays the workdocs of the selected batch.
- The middle pane displays the selected workdoc.
- The attributes pane displays the pages, words, text blocks, and text lines as well as several other attributes.
- The properties pane displays the properties of the selected attribute.

Configure the Database Connection

To configure the database connection, complete the following steps.

1. From the **C:\Program Files (x86)\Oracle\WebCenter Forms Recognition** directory, open **DstWkBrw.exe.config** in a text editor.
2. Complete one of the following actions.

Situation	Steps
Configure the connection to an Oracle database.	<ul style="list-style-type: none"> • Set <code>Data Source</code> to the data source. • Set <code>User ID</code> to the service account user ID. • Set <code>Password</code> to the service account password.
Configure the connection to a SQL Server database.	<ul style="list-style-type: none"> • Set <code>Data Source</code> to the data source. • Set <code>Initial Catalog</code> to the SQL Server database catalog. • Set <code>User ID</code> to the SQL Server user ID. • Set <code>Password</code> to the SQL Server password. •

3. Save and close the file.

Open a Workdoc from the File System

To open a workdoc from the file system, complete the following steps.

- a. On the toolbar, click the **File System View**  button.
- b. In the upper left pane, browse to the required directory.
- c. In the lower left pane, select the required workdoc.
- d. Optional. In the middle pane, use the buttons on the toolbar to adjust the view to your needs.

Open a Workdoc from the Database

To open a workdoc from the file system, complete the following steps.

1. On the toolbar, click the **Database View**  button.
2. If the **Login** dialog appears, type your user name and password and then click **OK**.
Note: The user must be available in the WebCenter Forms Recognition database.
3. In the upper left pane, expand the required job and then select a batch.
4. In the lower left pane, select the required workdoc.
5. Optional. In the middle pane, use the buttons on the toolbar to adjust the view to your needs.

Copy a Batch to the File System

To copy a batch to the file system, complete the following steps.

1. On the toolbar, click the **Database View**  button.
2. If the **Login** dialog appears, type your user name and password and then click **OK**.
Note: The user must be available in the WebCenter Forms Recognition database.
3. In the upper left pane, right-click a batch and then click **Copy Batch To File System**.
4. In the **Select Folder** dialog box, type or browse to the required directory and then click **OK**.

Copy a Batch to a Database

To copy a batch to a database, complete the following steps.

1. On the toolbar, click the **Database View**  button.
2. If the **Login** dialog appears, type your user name and password and then click **OK**.
Note: The user must be available in the WebCenter Forms Recognition database.
3. In the upper left pane, right-click a batch and then click **Copy Batch to Database**.
4. In the **Select The Target Database** dialog box, select a database and then click **OK**.
The batch is copied to a job with the same name. If the job does not exist in the target database, it will be created. If the batch is copied within the same database, a duplicate batch named *[OriginalBatchName]_[ConsecutiveNumber]* within the same job is created.
5. On the **View** menu, click **Refresh**.

Copy a Document to the File System

To copy a workdoc WDC file and its associated documents to the file system, complete the following steps.

1. On the toolbar, click the **Database View**  button.
2. If the **Login** dialog appears, type your user name and password and then click **OK**.
Note: The user must be available in the WebCenter Forms Recognition database.
3. In the lower left pane, right-click a document and then click **Copy Document to File System**.
4. In the **WebCenter Forms Recognition Workdoc Browser - Save Workdoc** dialog box, type or browse to the required directory and then click **OK**.

Filter and Sort the Batches

To filter and sort the batches, complete the following steps.

Note: For more information, see "Batch filter conditions using column names" in the *Oracle WebCenter Forms Recognition Runtime Server User's Guide*.

Note: This function is only available in the Database View.

1. On the toolbar, click the **Filtering**  button.
2. In the **Batch Filtering & Sorting** dialog box, in the **Batch Filtering** field, type a WHERE condition.

Example State=550

3. Optional. In the **Batch Sorting** field, type the field you want to sort by and then click **Request**.

Export Filtered Batches

To export filtered batches, complete the following steps.

1. In the upper left pane, right-click the job and then click **Export All Filtered Batches**.
2. In the **Select The Target Database** dialog box, select a database and then click **OK**.

Examine the Attributes and Properties

The attribute pane displays the attributes of the current workdoc. Complete any of the following steps.

- To expand an entry that displays the book  symbol to its left, double-click the entry and then select any of the subordinate entries to display its properties.
- To highlight the found words, text blocks, or text lines, select the corresponding entry.

The Attributes Pane

The attributes pane displays the following information.

Attribute	Description
DocFiles	The number of images contained in the workdoc displays in brackets. The subordinate entries display path and file name of the TIF file. Select an entry to display the image in the document pane.

Pages	<p>The number of pages of the workdoc displays in brackets.</p> <p>The subordinate entries list the page indexes and their properties. Select an entry to display the page in the document pane.</p>
Words	<p>The number of words found during OCR displays in brackets. Select this attribute to highlight all words on the document.</p> <p>The subordinate entries list all words found on the document. Select an entry to highlight the word on the document and to display its properties.</p>
TextBlocks	<p>The number of blocks displays in brackets. Select this attribute to highlight all blocks on the document.</p> <p>During OCR, the found words that have a geometrical relationship are assigned to blocks, for example the vendor address on an invoice.</p> <p>The subordinate entries list all text blocks found on the document. Select an entry to highlight the text block on the document and to display its properties.</p>
TextLines	<p>The number of lines found by the Brainware line extraction or the Advanced line extraction displays in brackets. Select this attribute to highlight all lines on the document.</p> <p>During OCR, the words that are geometrically on the same line, are assigned to text lines.</p> <p>The subordinate entries list all text lines found on the document. Select an entry to highlight the text line on the document and to display its properties.</p>
Fields	<p>The number of fields displays in brackets.</p> <p>The subordinate entries list all fields defined in the assigned class. Select an entry to display its properties.</p> <p>In the properties pane, select a candidate to highlight the candidate on the document.</p>
DocClassName	Name of the assigned class.
BlockCount	Number of text blocks.
DisplayPage	Index of the currently displayed page.
DocState	<p>Current state of the document within the workflow.</p> <p>For more information, see "CDRDocState" in the <i>Oracle WebCenter Forms Recognition Scripting User's Guide</i>.</p>
ErrorDescription	Description of the error or blank if none occurred.
FileName	File name of the workdoc.
Folder	Folder name.

FolderIndex	Index of the folder.
Language	Language activated for the workdoc.
Showtooltips	True: Display tool tips when the user moves the pointer over the workdoc. False: Do not display tool tips when the user moves the pointer over the workdoc.
TextLineCount	Number of lines.
VersionCount	Number of versions.
WordSegmentationChars	Characters that indicate the end of a word and the beginning of a new one.

Merge SLW Learn Sets tool

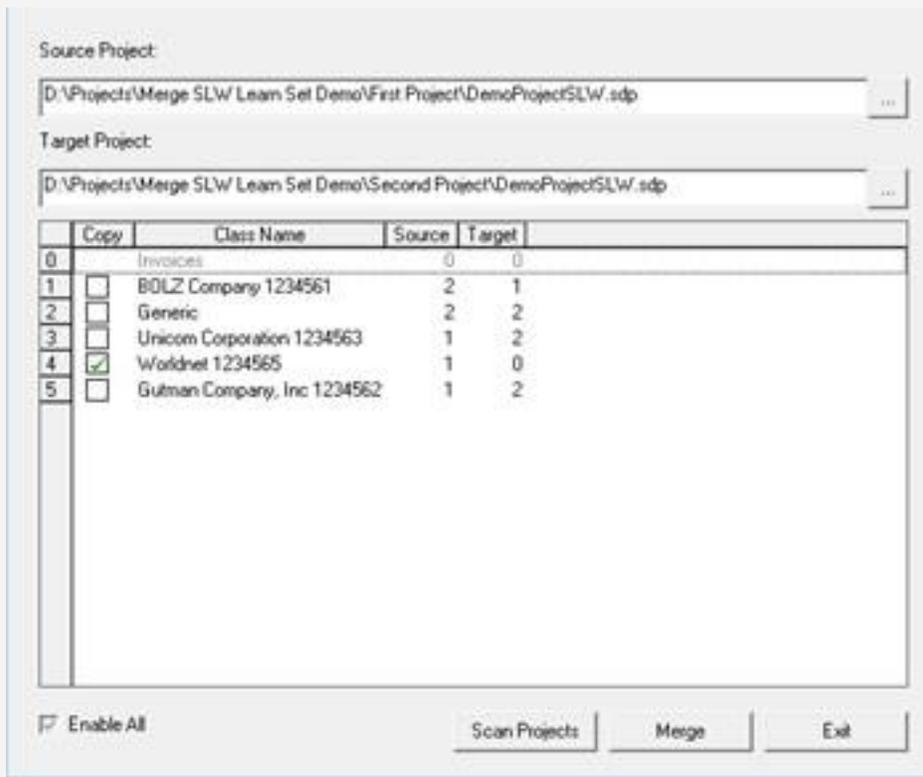
About the Merge SLW Learn Sets Tool

An administrator supporting a highly distributed system of different workstations could be easily confronted with maintenance of a high number of separate knowledge bases, created at different locations, at different times. Thus in some cases it might be required to merge the learn sets (created in context of the same production global SLW project) from different project files, being able to provide some additional considerations.

Use this tool to quickly merge multiple SLW sub-projects, overtaking the “SLW knowledge” without using the learnset manager tool. The Merge SLW Learn Sets tool enables you for example to quickly correct corresponding configuration errors related to “disconnected” local Advanced Verifier workstations.

The tool works only with Supervised Learning Workflow (SLW) projects, which are the instances of the same master (global) SLW project. In this connection, only the SLW vendor classes can be populated and/or updated through this tool. The tool cannot update classes if the project contains any classes that are not created automatically by SLW.

Example



In the example above, the tool analyzed and found out the following.

Base class “Invoices” with no documents in learn sets (neither source, nor target)

Lines 2,3,4,5 the derived classes with names and number of already learned documents (both in source and target projects)

As of line 4 the “Worldnet 1234565” has one document in the source project, but no documents in the target project, therefore the tool automatically suggests to make a copy from source to target project. You can also manually select some other nodes; for example, you’d choose two extra nodes “Unicom” and “BOLZ”, the class “Unicom” of the target project is trained with one more document available for this class in the source project and the class “BOLZ” – with two more documents available in the source project.

Merge SLW Learn Sets

To merge SLW learn sets, complete the following steps.

1. From the Windows Start menu, launch the **Merge SLW Learn Sets tool**.
2. In the **Source Project** field, type or browse to the source project.
3. In the **Target Project** field, type or browse to the target project.
4. To discover and analyze the structures, click **Scan Projects**.
5. In the **Copy** column, select the classes you want to merge.
6. To merge the learn set into the target project, click **Merge**.

Note: The **Merge** button is only active if the tool finds learn sets that can be merged.

SLW Export Local Project tool

About the SLW Export Local Project Tool

Use this tool to create local project templates that can be used by Advanced Verifier workstations from your global project to provide the Supervised Learning content for the local projects.

The tool automatically analyzes and creates the corresponding learn set directories and learn sets and saves them with the new project.

Use the SLW Export Local Project Tool

To create a new local project from an existing global one, keeping either the entire settings of your base class, your learn set and your script, complete the following steps.

1. From the **Windows Start** menu, launch the **SLW Export Local Project Tool**.
2. Click **Load Project**.
3. In the **Export Local Project** dialog box, select a global project and then click **Open**.
4. Optional. To save the entire export project configuration as a part of the global project's stream, click **Save Project**.
5. Click **Export Project**.
6. In the **Export Project** dialog box, select the classes, learn sets, and scripts you want to export and then click **Export**.

Note: The project is marked with **P**, base classes are marked with **B**, sub-classes are marked with **S**.

7. In the **Export Local Project** dialog box, type a name for the new project and then click **Save**.