Oracle® Fusion Middleware

Managing Oracle WebCenter Enterprise Capture

11*g* Release 1 (11.1.1)

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Documentation for Oracle WebCenter Enterprise Capture
Workspace administrators that describes how to manage
Capture workspaces.

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Preface

This guide describes how to use the Oracle WebCenter Enterprise Capture Workspace Console to configure and manage Capture workspaces.

Audience

This document is intended for workspace managers responsible for a Capture environment. Managers use the console to create workspace elements such as metadata fields, client and commit profiles, and automated processor jobs.

This document may also be used by workspace viewers who have read-only access to a workspace.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Capture Workspace Console Accessibility Features

The following topics detail the features available in the Capture Workspace Console to support accessibility:

- User Preferences
- Capture Workspace Console Keyboard Shortcuts

User Preferences

Login to Capture Workspace Console (Section 2.2) and click **Preferences**.

The **User Preferences** window is displayed:

Element	Description
Accessibility	The following accessibility options are available:

Element	Description
I use a screen reader	Select this option to use a screen reader.
I use high contrast colors	Select this option to use high contrast colors.
I use large fonts	Select this option to use large fonts.
Skin Family	Select a skin family. A skin family defines the look of the console's user interface.

Capture Workspace Console Keyboard Shortcuts

The shortcuts listed in the following table are available in the Capture Workspace Console user interface:

Keyboard Shortcut	Description
Alt + X (Internet Explorer), Alt + Shift + X (Mozilla Firefox)	Focuses on and executes the **Next** button to move forward to the next train stop.
Alt + C (Internet Explorer), Alt + Shift + C (Mozilla Firefox)	Focuses on and executes the **Cancel** button to cancel the current operation.
Alt + S (Internet Explorer), Alt + Shift + S (Mozilla Firefox)	Focuses on and executes the **Submit** button to save changes and exit the window.
Alt + B (Internet Explorer), Alt + Shift + B (Mozilla Firefox)	Focuses on and executes the **Back** button to return to a previous train stop.

Related Documents

For more information, see the following documents in the Oracle WebCenter Enterprise Capture documentation set:

- *Oracle Fusion Middleware Administering Oracle WebCenter Enterprise Capture*

- *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*

- *Oracle Fusion Middleware Developing Scripts for Oracle WebCenter Enterprise Capture*

Conventions

The following text conventions are used in this document:

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

1

Capture Workspace Overview

Oracle WebCenter Enterprise Capture provides scalable document capture focused on process-oriented imaging applications and image-enabling enterprise applications. With a web interface for centralized or distributed environments, Capture streamlines the document capture process for paper and electronic documents. It is fully integrated with Oracle WebCenter Content: Imaging and Oracle WebCenter Content to provide organizations with one system to capture, store, manage, and retrieve their mission critical business content.

This chapter provides a general introduction to Oracle WebCenter Enterprise Capture and its administration. It includes the following sections:

- About Oracle WebCenter Enterprise Capture
- About the Capture Client
- About Capture Workspaces
- About the Capture Batch Processors
- About the Capture Workspace Console
- About Capture Administrator and User Roles
- About Capture Security
- Workspace Manager Tasks
- About Capture Customization
- Capture Workspace Use Case

1.1 About Oracle WebCenter Enterprise Capture

Batches and **documents** are the primary drivers of work in WebCenter Enterprise Capture. In Capture, 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) that are organized into documents and assigned metadata (index) values. Each document shares a set of metadata values.

▶ See video

WebCenter Enterprise Capture involves the following main processes:

- Capture
- Conversion
- Classification
- Release

- [Commit](#)

1.1.1 Capture

Capture refers to the scanning or importing of documents into batches within a Capture *workspace* (see Section 1.3). Common document input scenarios include:

- 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 inbox

Capture provides these methods of document input:

- Using the **Capture Client,** end-users manually scan documents or import electronic document files into batches using *client profiles* created by workspace managers. See Section 1.2 and Section 4.1.
- Using settings stored in an import job, the **Import Processor** automatically imports images and other electronic documents directly into Capture from email, network folders, or list files. See Section 5.1.

1.1.2 Conversion

Depending on the business scenario, non-image documents input into Capture may need to be converted to a different format. For example, an organization might convert PDF expense reports attached to imported email messages to an image format to allow their bar codes to be read. Capture's **Document Conversion Processor** automatically converts and merges documents within a batch using settings stored in a document conversion job. See Section 6.1.

1.1.3 Classification

Classification in Capture refers to separating a batch into its logical documents and assigning a **document profile** which determines a set of possible metadata fields available to each document. It also refers to assigning a batch status to a batch.

Classification can occur manually or automatically in Capture, in a variety of ways.

Document Separation

Document separation can occur in multiple ways:

- Manually, by users in the Capture Client. 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, client users can also add document separations as needed.
- Manually, by users during file import in the Capture Client.
- Automatically, during import by the Import Processor, based on job settings.
- Automatically, during bar code recognition by the Recognition Processor. If a batch is sent to the **Recognition Processor**, it will automatically perform bar code recognition and document classification. See Section 7.1.

Metadata Assignment

In Capture, documents are assigned a set of metadata values based on a **document profile**, which identifies the metadata fields available to index that type of document. Metadata values can be assigned:

- Manually, by users in the metadata pane of the Capture Client.

- Automatically, during processing by the Import Processor, based on job settings.

- Automatically, during processing by the Recognition Processor, based on job settings.

Metadata fields can take a variety of forms in Capture, including choice lists, dependent choice lists, database lookups, auto populated fields, and fields with input masks and display formats. Workspace managers configure these metadata field definitions in the workspace and then use them in client profiles or processor jobs. See Section 3.4.

Batch Status

In Capture, a batch status is assigned to a batch by the user or by a Capture processor such as Recognition Processor, Import Processor, Document Conversion Processor, or Commit Processor. See Section 3.9.

1.1.4 Release

Capture uses a lock and release system to ensure that only one user or processor job has access to any batch at a time, as described below.

Client Batch Icon	Description
Locked to You	A batch automatically becomes locked to a user when the user creates or opens (expands) it, and stays locked until the user releases it.
	When done working with batches, users release them. Releasing a batch automatically synchronizes its documents and metadata with the WebCenter Enterprise Capture server and forwards the batch for post-processing, if post-processing is configured in its client profile.
Locked to Another User	If a user attempts to open a batch locked by another user, a message displays, identifying the workstation of the user who locked the batch.
Unlocked	The batch is not currently locked and is available to any user.
Processing	The batch is currently being processed by a batch processor and is unavailable. If a released batch is set for post-processing (commit, recognition, or document conversion), its icon changes to processing.
Error	If a batch enters an error state, its lock is released. This allows the batch to be examined and locked by another processor or user. (Users can right-click an error icon to view details about the error.)

1.1.5 Commit

Committing a batch takes all of its documents (image and/or non-image) and their metadata, writes them in a selected output format to a specific location or content repository, and then removes them from the Capture workspace. This allows the documents to be located and accessed in the content repository via their metadata or contents. Note that when a batch is committed, some of its 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 Capture workspace.

Batches are committed by Capture's **Commit Processor** using settings selected in an assigned *commit profile*. Commit profiles can commit to:

- WebCenter Content Server
- WebCenter Imaging (directly or via Input Agent)
- Commit text file (often for consumption by another process or Oracle technology)

You can output documents to one of the following formats during commit:

- TIFF Multi-Page
- PDF Image-Only. **Note:** It creates a PDF/A-1a compliant PDF file.
- PDF Searchable, with an optional full text file that contains text found in documents via Optical Character Recognition (OCR).

Note that during committing, non-image files that were not converted to image format remain in their original format.

For information about committing, see Section 8.1.

1.2 About the Capture Client

The Capture Client is the end-user application that a knowledge worker or scan operator uses to create batches using scanners or document files imported from a file folder and/or index documents within batches. The client's main functionality includes:

- Scanning and importing documents, using the industry standard TWAIN interface to scan from desktop scanners or other TWAIN-compliant input devices
- Reviewing, editing, and indexing documents
- Releasing batches so that they can be further processed so that corresponding documents can be checked into a content repository or attached to business application records

The Capture Client provides a single window whose upper left batch pane is fixed, while its other panes change, depending on the batch pane selection. For example, the document pane shown in the right of Figure 1–1 displays page thumbnails (smaller page representations) and options for editing documents and their pages. The lower left indexing pane shows metadata fields to complete for the selected document.

Figure 1–1   Capture Client Window
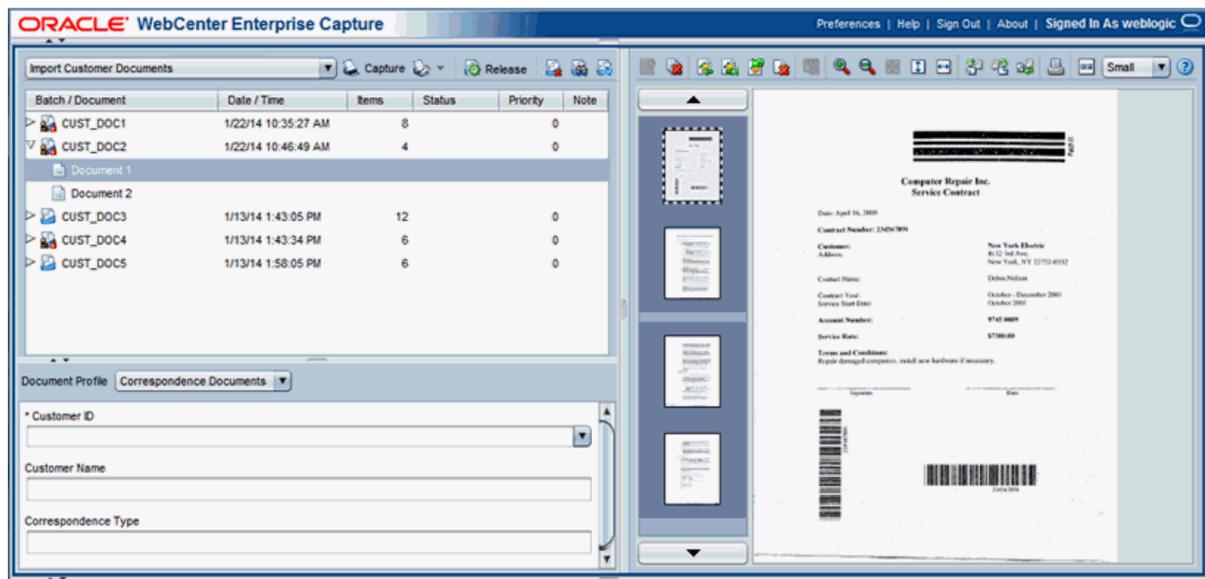
▶ See video

For Capture Client user information, see *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*.

1.3 About Capture Workspaces

A Capture workspace represents a complete capture system, providing a centralized location for metadata, configuration profiles, and physical data for a particular environment. Capture Client users create and access batches within the workspace to which they have been granted access. Workspace managers configure and manage workspaces they have been granted access to and control others' access to the workspace.

The Capture workspace provides these benefits:

- A separate work area useful for managing document capture for a department or division, or an organization

- Shareable elements for re-use in multiple Capture components

- Secure access to workspaces, provided by Capture's user/group restrictions on workspaces

- Ability to copy a workspace, for easily adapting its configuration for another environment

- Ability to restrict access to batches created within a workspace by client profile

For more information about workspaces, see Section 3.1.

1.4 About the Capture Batch Processors

WebCenter Enterprise Capture provides the following processors, which workspace managers configure for automation in the workspace console:

- The **Import Processor** provides automated bulk importing, from sources such as a file system folder, a delimited list (text/ASCII) file, or the inbox/folder of an email

server account. The import job monitors the source and imports at a specified frequency, such as once a minute, hour, or day. See Section 5.1.

- The **Document Conversion Processor** automatically converts non-image documents to a specified format in Capture using Oracle Outside In Technology. Documents can also be merged in various ways during conversion. For example, the conversion processor can convert document files such as PDFs or Microsoft Office documents to TIFF image format. See Section 6.1.

- The **Recognition Processor** automatically performs bar code recognition, document organization, and automatic indexing. See Section 7.1.

- The **Commit Processor** executes commit profiles to automatically output batch documents to a specified location or content repository, then removes the batches from the workspace. Supported document output formats include: multiple page TIFF, image only PDF, and Searchable PDF. A *commit profile* specifies how to output the documents and their metadata, and includes metadata field mappings, output format, error handling instructions, and commit driver settings. See Section 8.1.

Batch Flow

Workspace managers can queue batches to specific batch processors through post-processing options.

- If configured, import processing is the initial processing step, responsible for creating and capturing document batches.

- If configured, commit processing is the final processing step.

- If configured, document conversion and recognition processing are intermediate processes. Because bar code recognition requires image format, document conversion typically precedes recognition.

The following is an example batch flow:

1. Batches are captured either in the client or through an Import Processor job.

   Post-processing in the client profile or import job is set to Document Conversion.

2. The imported documents in the batch are converted through a document conversion job to images.

   Post-processing in the conversion job is set to Recognition Processor.

3. Bar codes on the converted image documents are processed by a recognition job.

   Post-processing in the recognition job is set to Commit Processor.

4. When a batch is processed by the Commit Processor, online commit profiles process the documents, committing them to a content repository or network folder.

1.5 About the Capture Workspace Console

Capture provides a central configuration console in which workspace managers create and manage workspaces and their elements for use throughout Capture. For example, workspace managers create metadata fields, choice lists, and database lookups in the console, then use them in multiple areas such as client profiles and batch processors. See Section 3.1.

Figure 1–2   Workspace Console Window
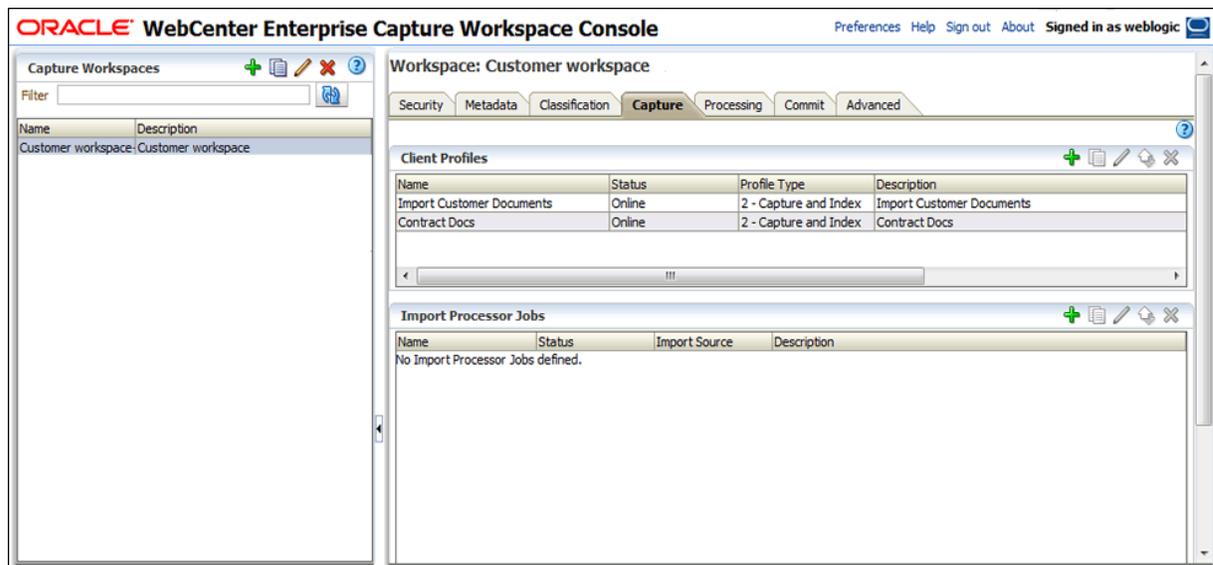
1.6 About Capture Administrator and User Roles

Capture provides the following administrator and user roles, each with a different access level and set of tasks:

- **System Administrators** install and configure the Capture system environment, map users or groups configured in a policy store to Capture roles, and monitor Capture processing. They also manage data sources for use in a Capture workspace. It is assumed that system administrators have system administration permissions, including Enterprise Manager and Oracle WebLogic Server access. System administration is covered in *Oracle Fusion Middleware Administering Oracle WebCenter Enterprise Capture*.

- **Capture Workspace Managers** have read/write access to workspaces they create and ones to which they have been granted access. They can add, edit, copy, and delete workspaces, and configure profiles and processor jobs. Note that workspace managers can also use certain WLST commands with their assigned workspaces. For task information, see Section 1.8.

- **Capture Workspace Viewers** have read-only access to workspaces to which they have been granted access. For example, a workspace viewer might review workspace configuration, client profiles, and processor job settings within the workspace to resolve issues. Workspace viewers cannot make changes to workspaces.

- **Capture Users** have access to the Capture Client only. They can see and select only those client profiles to which they have been granted access. These end-users create batch-related content within a workspace, including batches, documents, and pages. Capture user information is covered in *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*. Note that workspace managers are typically assigned both the workspace manager and user role, which enables them to switch between configuring the workspace and testing configurations in the client.

- **Developers** who write customization scripts for use in Capture components may either be added as Capture workspace managers and granted the workspace manager role or they may provide scripts to workspace managers who import, reference, and test their scripts in Capture components. Information on developing

scripts for Capture is provided in *Oracle Fusion Middleware Developing Scripts for Oracle WebCenter Enterprise Capture*.

1.7 About Capture Security

Capture's user login, access, and authentication are integrated with Oracle Platform Security Services (OPSS). See "Introduction to Oracle Platform Security Services" in *Oracle Fusion Middleware Securing Applications with Oracle Platform Security Services*. After authentication, users' permissions depend on their assigned Capture roles, which the system administrator assigns in Oracle Enterprise Manager.

▶ See video

Capture provides multiple access points, as described in the following sections:

- Section 1.7.1, "About Workspace Console Access"

- Section 1.7.2, "About Client Access"

1.7.1 About Workspace Console Access

Access to the console and workspaces functions as follows:

- For the *console*, workspace managers and viewers assigned the Capture workspace manager or viewer role, respectively, can sign in and access the workspace console.

- For *workspaces*, workspace managers automatically have access to workspaces they create. To access any other workspace, a manager with workspace access must grant other managers and viewers access to it on the **Security** tab, as described in Section 3.3.

1.7.2 About Client Access

Access to the client and client profiles functions as follows:

- For the *client*, users or an assigned user group must be granted the Capture user role to sign into and access the client.

- For *client profiles*, workspace managers must grant users and/or user groups access to a selected client profile on the profile's **Security** train stop, as described in Section 4.16.

1.8 Workspace Manager Tasks

The following steps summarize how you configure and manage a workspace environment, using the workspaces pane and workspace tabs.

1. Get started accessing the Workspace Console and the Capture Client, as described in Chapter 2.

2. In the workspaces pane, create and manage workspaces.

   The Workspace Manager role has access to workspaces they create or other workspace managers grant them access to. See Section 3.2.

3. On the **Security** tab, manage workspace access for Capture users. See Section 3.3.

4. On the **Metadata** and **Classification** tabs, create and manage workspace elements for use in the workspace, including metadata fields, choice lists, database lookups, batch statuses, and document profiles. See Chapter 3.

5. On the **Capture** tab, create and manage client profiles, as described in Chapter 4. In the Capture Client, test the client profiles.

6. On the **Capture** tab, create and manage Import Processor jobs, as described in Chapter 5.

7. On the **Processing** tab, create and manage Recognition Processor jobs (Chapter 6) and document conversion jobs (Chapter 7).

8. On the **Commit** tab, create and manage commit profiles. See Section 8.1.

9. On the **Advanced** tab, import scripts provided by developers. See Section 3.11.

10. If needed, use **WLST** commands to import and export workspaces, or release or export batches. See Chapter 10.

1.9 About Capture Customization

To extend Capture functionality, developers can write and incorporate JavaScript extensions. For example, a Capture Client extension could validate an account number metadata field value using a proprietary calculation.

Capture behavior can be customized using JavaScript extensions in the following components:

- Capture Client
- Import Processor
- Recognition Processor

For information about using scripts in supported Capture components, see Section 3.11. For developer information about writing scripts, see *Oracle Fusion Middleware Developing Scripts for Oracle WebCenter Enterprise Capture*.

1.10 Capture Workspace Use Case

You can use Oracle WebCenter Enterprise Capture to process virtually any type of document. This guide features a use case in which Oracle WebCenter Enterprise Capture processes a large volume of customer documents, with the workspace manager automating the process as much as possible to meet business needs.

The Customer workspace processes these types of customer documents:

- Correspondence
- Purchase Orders
- Customer Agreements

Figure 1–3 illustrates the workspace's main configuration.

Figure 1–3   Customer Workspace
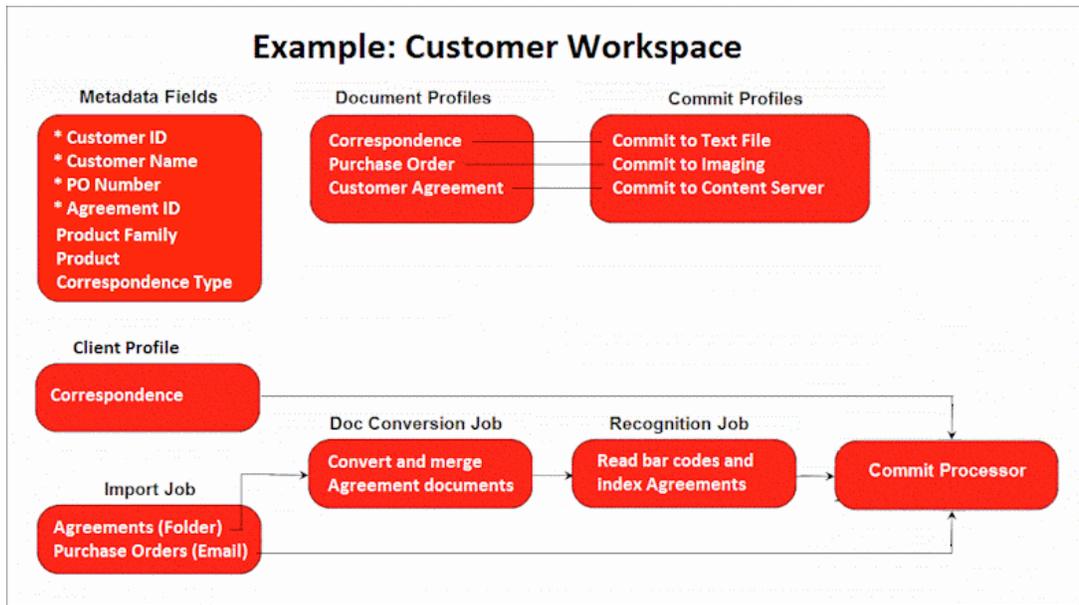
1.10.1 Document Profiles for the Customer Workspace

Three document profiles accommodate the main types of documents processed, and include: Correspondence, Purchase Orders, and Customer Agreements.

1. **Correspondence** arrives by mail and takes the following path:

   a. Client users scan and index batches of correspondence documents using a Correspondence client profile, then release them.

   b. Documents are output (committed) to a folder using a text file commit profile and picked up by another process.

2. **Purchase Orders** arrive by email and take the following path:

   a. An Import Processor job checks for new email messages for specified accounts, and imports and indexes the email message as a document as well as attached purchase order documents.

   b. Documents are committed to Oracle WebCenter Content: Imaging for transaction processing.

3. **Customer Agreements** are scanned using a variety of multi-function devices (MFDs), which send the scanned documents to a network file share. These documents may arrive in either TIFF or PDF format, and take the following path:

   a. An Import Processor job checks the network folder for new files and imports them.

   b. A Document Conversion job converts the PDF documents to a standard image format. A Document Conversion job is used to ensure all incoming documents are in image format to ensure processing by the Recognition Processor.

   c. A Recognition job reads the images' bar codes, separates the images into documents, and indexes the documents. Document separation is needed in case multiple agreements were scanned into a single file.

   d. Documents are committed to Oracle WebCenter Content for storage and retrieval.

1.10.2 Metadata Configuration for the Customer Workspace

Figure 1–4 displays metadata fields defined for the Customer workspace, which are then included in document profiles as they apply. For example, the Correspondence document profile includes Customer ID, Customer Name, Product Family, Product, and Correspondence Type metadata fields.

Figure 1–4   Example Metadata Fields and Configuration
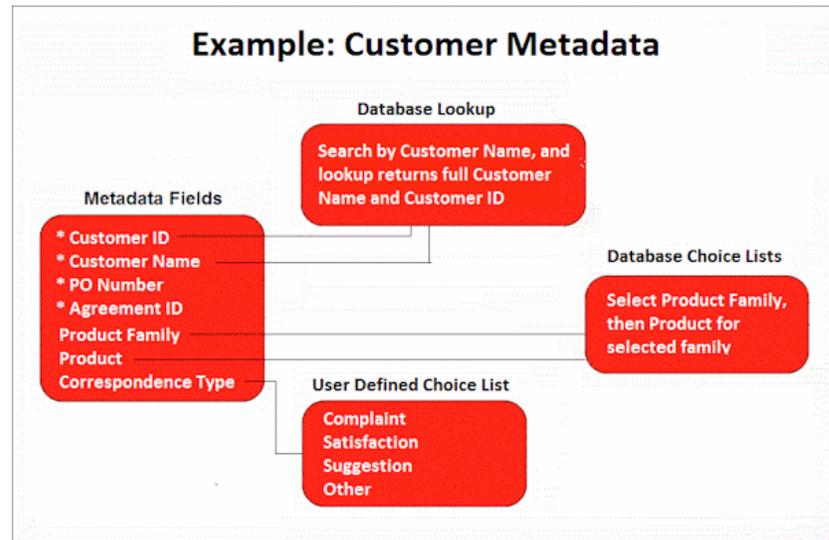
- ■ The **Correspondence Type** metadata field uses a user defined choice list that allows users to select the type of correspondence document they are indexing (a complaint, satisfaction, suggestion, or other document).

- ■ The **Customer Name** metadata field uses a database lookup, where a search for customer name returns both the full customer name and the unique **Customer ID**.

- ■ The **Product Family** and **Product** metadata fields use database choice lists that allow users to select product information from a database source. They have a choice list dependency, where the user's product family choice determines the products listed.

1.10.3 Processor Configuration for the Customer Workspace

There are multiple business scenarios in which document conversion and merging play an integral role, particularly when Capture's other automated batch processors are also involved.

For example, suppose your organization receives PDF documents such as expense reports via email. Each PDF document contains a bar code and the email message may contain relevant information. You might create the following configuration:

1. An Import Processor job imports the email messages, creating batches containing two documents (the PDF and the email message, positioned last). After processing the email message, Import Processor forwards the batch to the Document Conversion processor.

2. A Document Conversion Processor job converts each batch's PDF and email message to image format. (Image format is needed for later bar code recognition.) The processor merges the two documents to a single document, so that the email message is included within the PDF document. If the email contains two PDF

expense reports, the email message should display as the last page of each expense report document. The Document Conversion Processor forwards the batch to the Recognition Processor.

3. A Recognition Processor job performs bar code recognition and indexing of each document. Recognition Processor forwards the batch to the Commit Processor.

4. The Commit Processor commits the batch.

2

Getting Started Managing Capture Workspaces

Getting started involves accessing the Capture Workspace Console and creating a workspace, then adding several metadata fields, a client profile, and a basic commit profile. After that, you use the Capture Client and test your workspace settings. Beyond these steps, you can expand into managing workspace elements, including choice lists, database lookups, and batch processor jobs.

This chapter includes the following sections:

- Before You Begin
- Accessing the Capture Workspace Console
- Creating Your First Workspace and Elements
- Starting the Capture Client
- Testing Your Workspace Settings in the Client

2.1 Before You Begin

As described in Section 1.6, the Capture system administrator installs Oracle WebCenter Enterprise Capture, starts the server, performs its initial configuration, and monitors its overall performance, including batch processor logging. This section assumes these steps are complete.

Items You Need

To get started managing a Capture workspace, you need the following from the Capture system administrator:

- URLs for accessing the Capture Workspace Console (Section 2.2) and the Capture Client (Section 2.4).
- A user ID and password to access the Capture Workspace Console.
- A user ID and password to use the Capture Client.

Optional Items

To manage workspaces, you may also need the following from the Capture system administrator:

- Data sources for connecting to an external database, needed for creating database lookups and database choice lists.
- For scanning, you need access to a TWAIN-compliant scanner or multi-function device. Note that instead of scanning documents, you can import them from your file system, as described in this chapter.

- For importing, you may want to have TIFF image files, PDF documents, and Microsoft Word or Excel documents available.

- For scanning and recognition, you may want to have pages with bar codes and patch codes available.

2.2 Accessing the Capture Workspace Console

Follow these steps to access the workspace console, where you create and manage workspaces. If needed, ask the Capture system administrator for sign-in information.

1. Open the Oracle WebCenter Console in your browser. The exact URL is determined at installation. The address uses the following format:

   `http://server:port/dc-console`

   Note that `16400` is the default port.

2. At the Sign In window, enter your **User ID** and **Password**, and click **Sign In**.

   The workspace console window displays, as shown in Figure 2–1.

Figure 2–1   Workspace Console
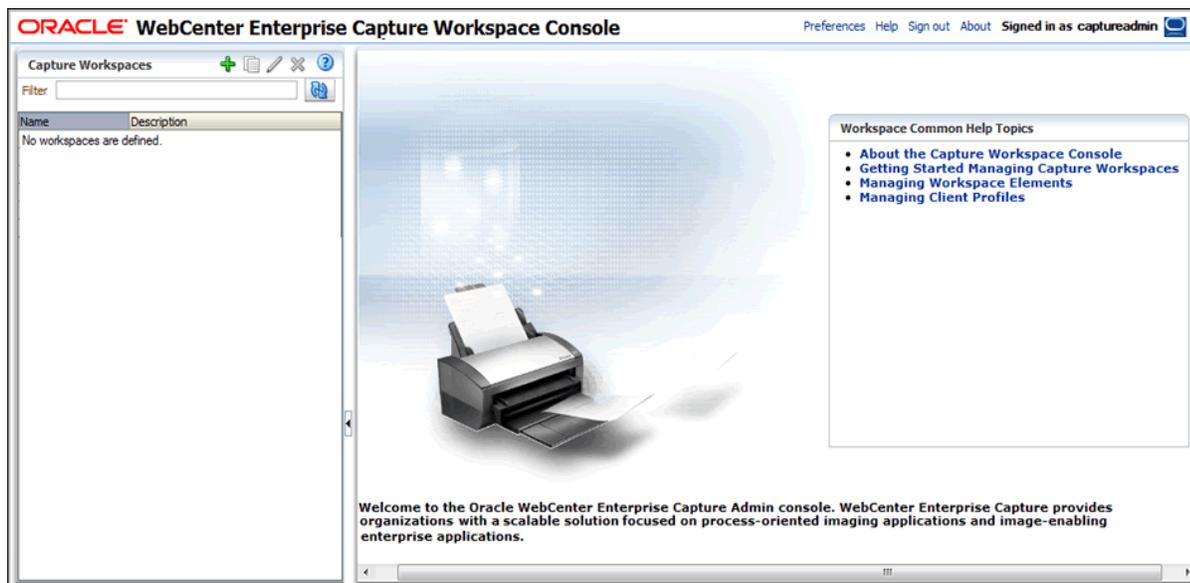
2.3 Creating Your First Workspace and Elements

Follow the steps in these sections to create a workspace and add metadata fields and profiles.

- Section 2.3.1, "Example: Creating a Workspace"

- Section 2.3.2, "Example: Creating Metadata Fields"

- Section 2.3.3, "Example: Creating Document Profiles"

- Section 2.3.4, "Example: Creating a Client Profile"

- Section 2.3.5, "Example: Creating a Commit Profile"

2.3.1 Example: Creating a Workspace

If you are the first workspace manager to use the workspace console, no workspaces are present. To add a workspace:

1. In the Capture Workspaces pane at left, click the **Add** button (plus sign).

2. In the Create New Workspace window, enter a name for the workspace and click **OK**. For example, enter `Customer workspace`.

   The new workspace is added to the workspaces pane. For more information about adding, copying, and editing workspaces, see Section 3.2.1.

3. Select the new workspace, and its settings display in the right pane.

   Notice that the **Security** tab displays your user name in the Workspace Users table, configured by the Capture system administrator during installation and initial configuration. You have workspace manager access to the workspace and can grant other managers or workspace viewers access to it.

Figure 2–2   New Workspace With Security Tab Displaying Workspace Users

2.3.2 Example: Creating Metadata Fields

Now create several metadata fields to hold metadata values for captured documents.

1. On the **Metadata** tab, click the **Add** button in the Metadata Fields table.

2. Create several metadata fields.

   a. In the **Field Name** field, enter `Customer ID` and select the **Required** field. Click **Submit**. The new field displays in the Metadata Fields table.

      For more information about creating metadata fields, see Section 3.4.

   b. Add another field called `Customer Name`, make it required, and click **Submit**.

   c. Add another field called `Correspondence Type`, and click **Submit**.

d. Add another field called **Purchase Order Number**, and click **Submit**.

Figure 2–3 Metadata Tab With New Metadata Fields Added

Workspace: Customer workspace

| Security | **Metadata** | Classification | Capture | Processing | Commit | Advanced |

Metadata Fields

Name	Field Type	Max Length	Required	Locked	Display Format	Input Mask	Auto Populate
Correspondence Type	Alpha Numeric	0	No	No			(none)
Customer ID	Alpha Numeric	0	Yes	No			(none)
Customer Name	Alpha Numeric	0	Yes	No			(none)
Purchase Order Number	Alpha Numeric	0	No	No			(none)

User Defined Choice Lists

Type	Source Name	Choice List
Document Capture	Capture Source	

2.3.3 Example: Creating Document Profiles

In this section, you create a document profile, which defines the set of metadata fields that apply to a specific type of document.

1. On the **Classification** tab, click the **Add** button in the Document Profiles table.

    a. In the **Name** field, enter the type of document (for example, **Correspondence Documents**).

    b. Move all of the fields except Purchase Order Number to the **Selected Metadata Fields** list, and click **Submit**.

    For more information about creating document profiles, see Section 3.10.

Figure 2–4   New Document Profile With Its Set of Metadata Fields Selected

2. Create another document profile called **`Purchase Orders`**, select the following metadata fields for it, and order them as follows. Click **Submit**.

   ■ Purchase Order Number

   ■ Customer ID

   ■ Customer Name

2.3.4 Example: Creating a Client Profile

In this section, you create a client profile, which defines the settings used when users select it to scan, import, and index documents in the client.

1. On the **Capture** tab, click the **Add** button in the Client Profiles table. Screens for selecting settings (known as train stops) display in the right pane.

2. Complete settings on the **General Settings** train stop.

   a. In the **Profile Type** field, select **2 - Capture and Index**. Users will use this profile to capture (scan or import) documents and then index (complete metadata values) for them.

   b. In the **Profile Name** field, enter a name to display to users (example, `Import Customer Documents`). For example, you might use the name to indicate how users should use the client profile.

   c. In the **Batch Prefix** field, enter a naming prefix (for example, `CUST_DOC`). Capture names batches as they are created by appending an incremented number to this prefix.

3. On the **Image Settings** train stop, select **Import in Native Format** in the **Non-Image File Import Action** field.

    This action allows users to use this client profile to import non-image files such as PDF files or Microsoft Word documents in addition to image files. It also sets non-image files to be retained in their original format.

4. In the **Document Profiles** field on the **Document Indexing Settings** train stop, select the Correspondence Documents and Purchase Orders document profiles you created.

5. On the **Security** train stop, grant a Capture Client user security access to the client profile.

    This step requires a user or group assigned the CaptureUser role in the policy store. The Capture system administrator is responsible for assigning Capture User roles to groups or users.

    a. Click the **Add** button in the Client Profile Users table.

    b. In the Add Security Member window, specify whether to search groups or users assigned the CaptureUser role, and click **Search**. From the search results that display in the table, select a security member, and click **Add**, as shown in Figure 2–5.

Figure 2–5 Granting Client Profile Access to a Capture User

The user or group you added displays in the Client Profile Users table, as shown in Figure 2–6.

Figure 2–6 Capture User Authorized to Use the Client Profile
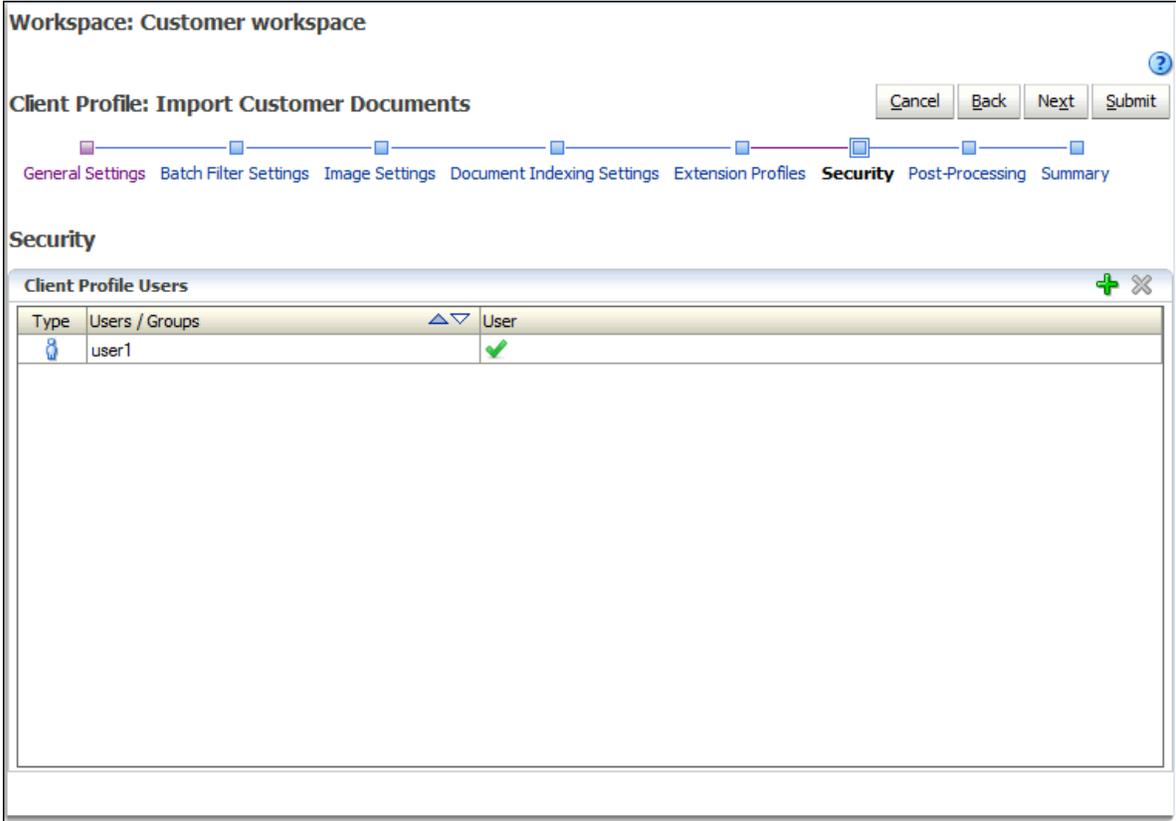
6. On the **Post-Processing** tab, select **Commit Processor** in the **Batch Processor** field, as shown in Figure 2–7.

   After users release batches created with this client profile, the batch's documents are output by the Commit Processor.

Figure 2–7   Commit Processing Set as the Client Profile's Next Post Processing Step

7. Save the client profile by clicking **Submit**. For more information about client profiles, see Chapter 4.

2.3.5 Example: Creating a Commit Profile

In this section, you create a commit profile. This commit profile defines how documents are output after client users using this client profile release batches. For this example, you configure output to a local or network folder, using the Text File commit driver.

1. On the **Commit** tab, click the **Add** button in the Commit Profiles table.

2. Complete settings on the **General Settings** train stop.

   a. In the **Commit Profile Name** field, enter a name (`Commit to Text`).

   b. In the **Commit Driver** field, select **Text File**.

   c. In the **Document Output Format** field, select **PDF Image-Only**.

   d. In the **Restrict Commit to Document Profiles** field, select the Correspondence Documents and Purchase Orders document profiles. This restricts this commit profile's processing to only those documents assigned to the selected document profiles.

3. Complete settings on the **Commit Driver Settings** train stop. Note that these settings are specific to the commit text file driver you selected in step 2b.

   a. On the **Text File Folder** tab, enter a location in the **Commit Text File Folder** field to write commit text files. A commit text file contains delimited metadata values for each document output in the batch. For the commit folder, you

must either specify a folder on the Capture server or a network path accessible from the Capture server. For this example, you might specify a shared folder on your system. If the Capture server is running on Windows, you might specify a UNC path to a network share, such as \\USER-SYSTEM\commit.

In the **File Prefix** field, enter **TEXT_FILE**.

In the **File Extension** field, enter **txt**.

    b. On the **Document Folder** tab, enter a location in the **Document Folder** field to write the document files (in this case, PDF files). As with the text file folder, either specify a folder on the Capture server or a network path accessible from the Capture server. For this example, you might specify a shared folder on your system. If the Capture server is running on Windows, you might specify a UNC path to a network share, such as \\USER-SYSTEM\commit.

Select the **Create a folder per committed batch** field.

    c. On the **Formatting** tab, move Correspondence Type, Customer ID, Customer Name, and <Batch Name> to the **Selected Fields** list. This specifies the metadata values to be written to the text file.

Note: Fields specified within <> are system fields. For example, <Batch Name>.

    d. On the **Document File Naming** tab, complete settings.

Select the **Name document file based on metadata field values** field to determine the document file name from the selected metadata field values of the document, then move <Batch Name> and Customer ID to the Selected Fields list.

In the **Field Delimiter** field, enter an underscore (_).

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

Figure 2–8   New Commit Profile For Committing to Text File

2.4 Starting the Capture Client

Follow these steps to start up the Capture Client application, where you test your client profile as an end-user by importing several documents.

1. Open the Oracle WebCenter Enterprise Capture client in your browser. The exact URL is determined at installation. The address uses the following format:

   ```
   http://server:port/dc-client
   ```

   Note that `16400` is the default port.

   If you do not know the client URL, ask your Capture system administrator.

2. When prompted, sign in as the user to whom you granted security access to the client profile in Section 2.3.4.

   Messages display the first time you start the client, indicating that the client is checking for updates and installing client software bundles. The installation of the client bundles is only performed the first time you run the client or when the server has been updated with new client bundles. When the client has completed downloading bundles, the client applet's main user interface displays and toolbar buttons display in the batch pane at left.

Figure 2–9   Capture Client Window Upon Startup
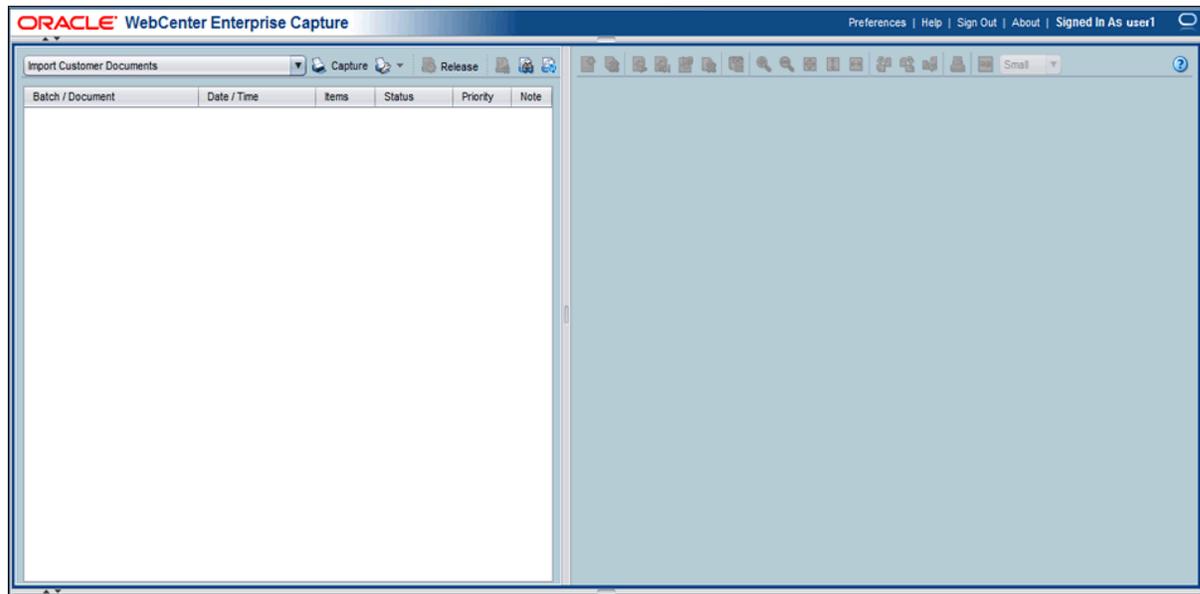
2.5 Testing Your Workspace Settings in the Client

Follow the steps in this section to test your workspace configuration in the client. For more information about using the Capture Client, see *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*.

- Section 2.5.1, "Example: Capturing Batches Using Your Client Profile"

- Section 2.5.2, "Example: Indexing Batches"

- Section 2.5.3, "Example: Releasing Batches"

- Section 2.5.4, "Example: Viewing Batch Commit Results"

2.5.1 Example: Capturing Batches Using Your Client Profile

The client provides a single window whose upper left pane, the **batch pane**, is fixed, while its other panes change, depending on the batch pane selection. For more information, see "Scanning and Importing Documents" in *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*.

1. In the batch pane, select your profile, Import Customer Documents, in the **Client Profile** field.

    This top left field displays client profiles available to you as a user, as you configured on the client profile's **Security** train stop in step 5 of Section 2.3.4. You should see profiles to which a workspace manager has granted you or a group you are a member of permission to.

2. Select the Capture Source.

    Select the right side (containing a triangle) of the **Capture Settings/Source** button, and verify that a check mark displays next to **Import Source**. If your system has one or more TWAIN-compliant scanners available, they are also listed here.

3. Click the **Capture** button to begin importing.

When prompted in the Import window, select the **Create one document per import file** import option and click **OK**.

4. Select files to import.

   In the Select files to import window that displays, hold down the Ctrl key and select multiple files to import. In addition to image files, you can also select non-image files such as Microsoft Word or PDF files.

   A batch is created and its batch properties display in the right pane. Notice that the batch was named using the prefix you specified when creating the client profile, followed by a number that increments with each new batch (CUST_DOC1). Also notice that the batch's icon indicates that it is locked to you.

5. In the batch pane, click the triangle to the left of your new batch to expand and view its documents.

6. Select each document, then review and edit it. Options for editing the selected document display in the document pane at right and are described in *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*.

Figure 2–10   Capturing New Batches in the Client Window
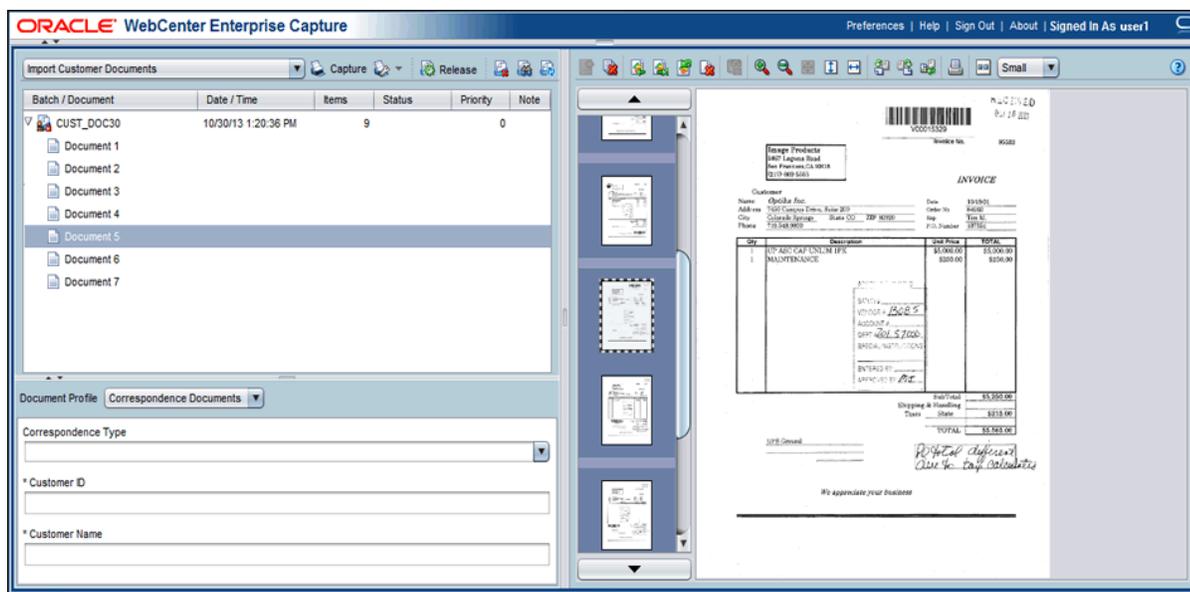
2.5.2 Example: Indexing Batches

After reviewing and editing documents, follow these steps to complete the metadata fields you configured. When a selected client profile is configured for indexing, metadata fields display in the lower left pane when a document is selected in the batch pane. For more information, see "Indexing Documents" in *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*.

1. In the batch pane, select a document.

   If needed, adjust the metadata pane by hovering the cursor between the batch and metadata panes until it changes to a two-headed arrow, then dragging to resize the panes.

2. In the metadata pane's **Document Profile** field, select a profile for the selected document.

Notice how the set of metadata fields changes when you select the other document profile you configured.

3. Complete metadata fields for the selected documents.

Notice that an asterisk displays next to the fields you defined as required when creating them in the workspace. A document is fully indexed when all required metadata fields for a document profile contain a value. You can release a batch even if one or more of its documents is not fully indexed, but an error may occur in later commit processing.

For this example, enter any alphanumeric values you wish into the metadata fields. Using the workspace console, you can configure metadata fields in a variety of ways. For example, you can include input masks in entry fields that control what users can enter, or configure fields to display choice lists or perform a database lookup.

Note that completing metadata values for a selected page completes them for the document. To index the next document, select it in the batch or document pane, change its document profile if needed, and complete the fields.

Figure 2–11 Indexing Documents in the Client's Metadata Pane
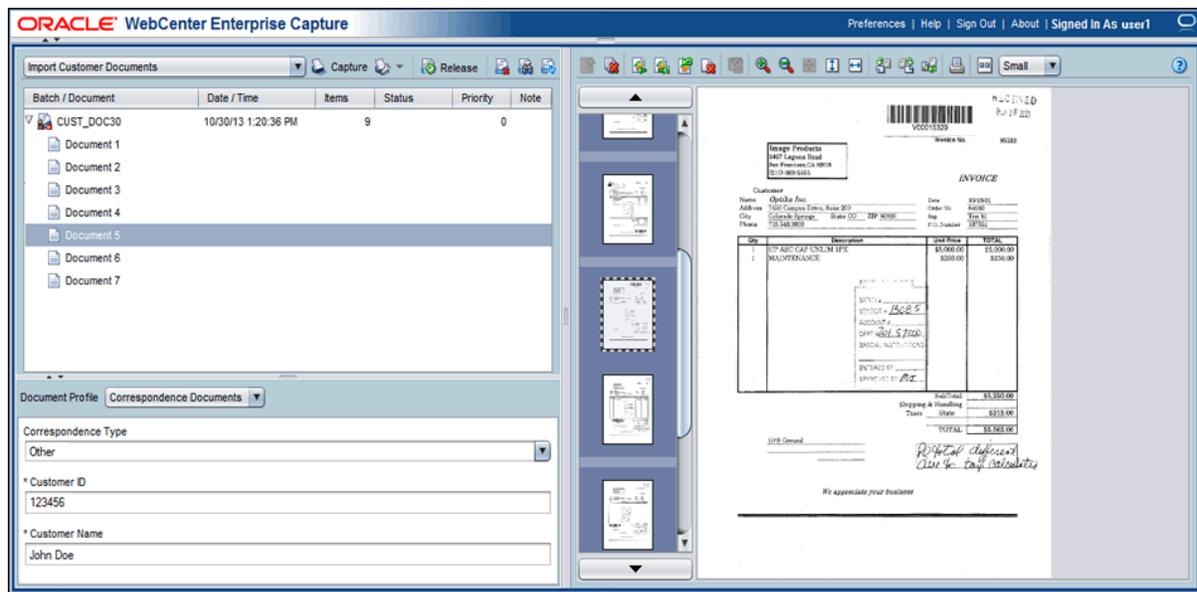
2.5.3 Example: Releasing Batches

When you are done working on a batch's documents, the next step is to release it. What happens when client users release batches depends on the client profile's post-processing setting. When configuring the client profile in Section 2.3.4, you set Commit Processor as the post-processing step, then created a commit profile to output to text file in Section 2.3.5.

1. In the batch pane, select the batch you created and indexed. (Hold down the Ctrl key to select multiple batches.)

2. Click the **Release** button to release selected batches.

A bar over the batch name moves to the right to show release progress, as shown in Figure 2–12. Releasing a batch synchronizes its documents with the Capture server and frees the batch for another user or a processor to work on.

During release, you can select other batches and documents to work on them.

3. Click the **Refresh Batch List** button.

The batch's icon may display a processing (gear) icon indicating that it is undergoing batch processing (in this case, by the Commit Processor). The batch may be removed from the batch list if the Commit Processor successfully committed all documents in the batch.

If an error occurs, the batch remains and one or more of its documents displays an error icon. For more information, see "Handling Batch Errors" in *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*.

Figure 2–12 Releasing Batches in the Client's Batch Pane
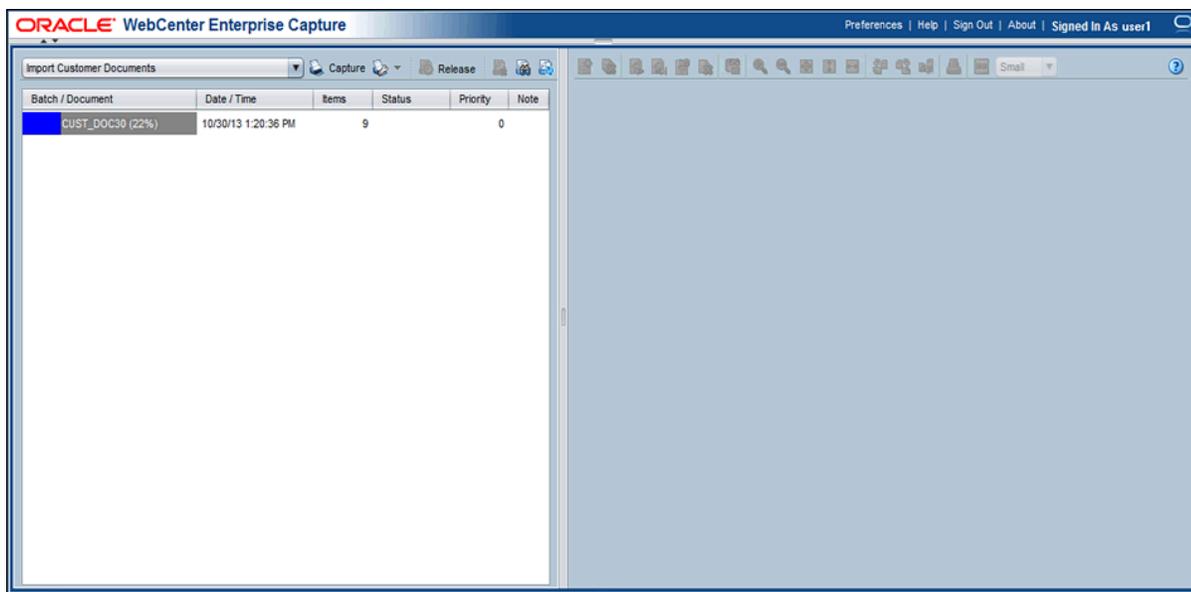
2.5.4 Example: Viewing Batch Commit Results

After commit processing completes and one or more released batches are removed from the batch list, check for the committed batch results (commit text file and documents) in the folder you specified when creating the commit profile in Section 2.3.5.

1. Open the text file folder you specified in the commit profile.

   You should see a text file for each batch committed.

2. Open the text file and view its contents.

   It displays values for the metadata fields you specified (Correspondence Type, Customer ID, Customer Name, and Batch Name).

3. Open the document folder you specified in the commit profile.

   You should see one or more PDF document files for each batch committed. Open a document file and view its contents. Note that any non-image files you imported were committed in their native format.

Figure 2–13   Text Commit Results

3
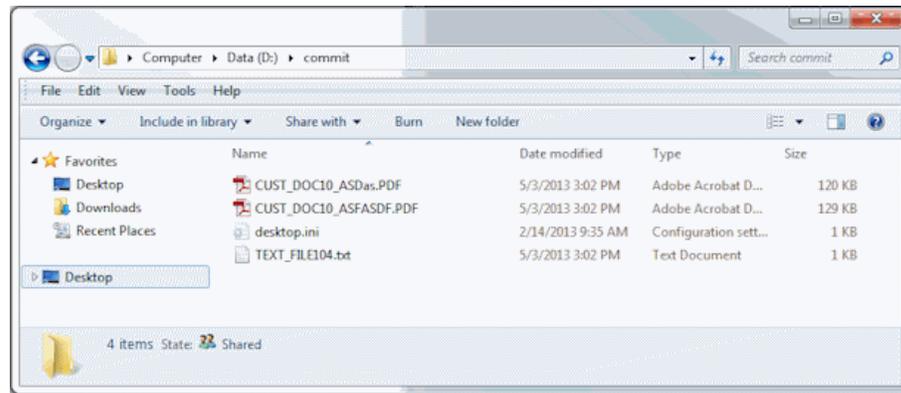
Managing Workspace Elements

As a workspace manager, you create and manage the shareable workspace elements integral to capturing and processing document batches. These elements, such as metadata fields, choice lists, document profiles, and database lookups, are described in this chapter. You can also make use of these workspace elements in client profiles, processor jobs, and commit profiles.

This chapter includes the following sections:

- Introduction to Workspaces and Their Elements
- Managing Workspaces
- Managing Workspace Security
- Managing Metadata Fields
- Managing User Defined Choice Lists
- Managing Database Choice Lists
- Managing Dependent Choice Lists
- Managing Database Lookups
- Managing Batch Statuses
- Managing Document Profiles
- Managing Capture Scripts

For information about the client profile and processor workspace elements, see the following chapters:

- Chapter 4, "Managing Client Profiles"
- Chapter 5, "Managing Import Processing"
- Chapter 6, "Managing Document Conversion Processing"
- Chapter 7, "Managing Recognition Processing"
- Chapter 8, "Managing Commit Processing"

3.1 Introduction to Workspaces and Their Elements

A workspace represents a complete Capture environment, containing metadata, configuration profiles, and physical data for a particular environment. Workspace managers can add, edit, copy, and delete workspaces.

Table 3–1 lists and describes the shareable Capture elements workspace managers work with in a selected workspace.

Table 3–1   Capture Elements to Manage in the Workspace

Capture Elements	How You Manage Them	Refer To
Workspace Users	Grant previously created Capture users or groups workspace manager or viewer access level to the selected Capture workspace.	Section 3.3
Metadata Fields	Create fields that client users or Capture processors populate with values for Capture documents. Configure how metadata fields are completed, such as choice lists or database lookups. Use metadata fields throughout the workspace.	Section 3.4
User Defined Choice Lists	Configure a metadata field to display a dropdown list of choices. With this type of choice list, you maintain the list of choices. Use choice lists in client profiles and processor jobs.	Section 3.5
Database Choice Lists	Configure a metadata field to display a dropdown list of choices. With this type of choice list, the choices come from a database search. Use choice lists in client profiles and processor jobs.	Section 3.6
Dependent Choice Lists	Configure dependencies between user defined or database choice lists, where the user's choice in a parent list affects the choices displayed in a linked child list.	Section 3.7
Database Lookup Profiles	Configure links to a database. For example, configure a lookup to search a database for a matching value, then return and populate Capture metadata fields. Use database lookups in client profiles or processor jobs.	Section 3.8
Batch Statuses	Create statuses that users or batch processors can assign to batches. Batch status can be used to filter which batches are displayed or acted upon.	Section 3.9
Document Profiles	For each type of document captured, specify the set of metadata fields that apply.	Section 3.10
Scripts	Import JavaScripts for customizing functionality in the client or in a Recognition or Import Processor job.	Section 3.11
Client profiles	Configure settings to be used by client users when they scan, import, and index documents in the Capture Client.	Section 4.1
Import Processor jobs	Configure automated importing of documents from email, a monitored folder, or a list file.	Section 5.1
Document Conversion jobs	Configure automated conversion of non-image documents to image format.	Section 6.1
Recognition Processor jobs	Configure automated bar code detection, document organization, and indexing of documents.	Section 7.1
Commit profiles	Configure how batches are output to a commit folder or content repository.	Section 8.1

3.2 Managing Workspaces

Below are some important points about managing workspaces:

- Adding a workspace creates an entirely new Capture environment, to which you add elements such as metadata fields and client profiles.

- You can also copy a workspace, which creates a new workspace with a different name based on the copied workspace's contents, but contains none of its batches or data. All configurations defined in the source workspace are included in the copy, including metadata fields, document profiles, client profiles, database lookups, choice lists, and processor jobs. Note that login credentials, such as an email account login defined in an email Import Processor job or a WebCenter

Content Server login defined in a WebCenter Content commit profile, are not copied into the new workspace.

- Editing a workspace refers to renaming it or changing its optional description; information about editing the selected workspace's elements is included throughout this chapter.

This section covers the following topics:

- Section 3.2.1, "Adding, Editing, or Copying a Workspace"
- Section 3.2.2, "Deleting a Workspace"
- Section 3.2.3, "Filtering Workspaces"

Figure 3–1   Workspaces Pane for Managing Workspaces
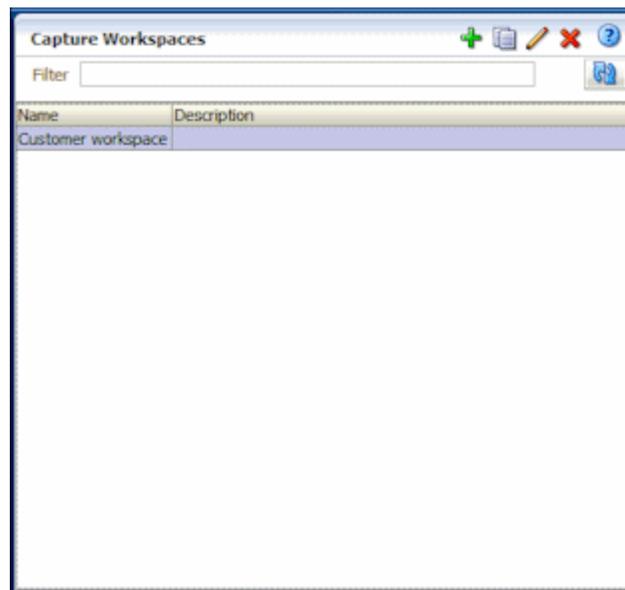
3.2.1 Adding, Editing, or Copying a Workspace

To add, edit, or copy a workspace:

1. In the workspaces pane, click the **Add** button or select a workspace and click the **Edit** button.

   To copy a workspace, select an existing workspace and click the **Copy** button.

2. Enter a name and optional description for the workspace, and click **OK**. The new or edited workspace displays in the workspace list.

3. Select the workspace to edit its elements, as described in this chapter.

3.2.2 Deleting a Workspace

Deleting a workspace permanently removes all of its batch data and configurations, including profiles, processor jobs, and metadata settings.

> **Caution:**   Ensure that no batches are being processed before deleting a workspace. Deleting a workspace with batches in process could be harmful.

To delete a workspace:

1. In the workspaces pane, select a workspace to delete and click the **Delete** button.

2. When prompted, click **Yes** to confirm the deletion.

3.2.3 Filtering Workspaces

If you manage many workspaces, you may find it useful to limit the workspace list by filtering it. To filter the workspace list:

1. In the workspaces pane, enter a filter in the **Filter** field.

   Enter the full name of the workspace, or use % as a wildcard to match one or more characters. For example, enter `%capture%` to display workspaces with *capture* in their names or descriptions. Note that filters are case sensitive.

2. Click the **Refresh** button.

   The workspace list is displayed with the filter you specified applied.

To remove the filter, clear the contents of the **Filter** field, and click the **Refresh** button.

3.3 Managing Workspace Security

As described in Section 1.7.1, a workspace manager with access to a workspace can grant or remove other managers' or viewers' access to it on the **Security** tab. Note that managers and viewers must already have access to the workspace console itself, as described in Section 1.6.

This section covers the following sections:

■ Section 3.3.1, "Granting Workspace Access to Workspace Managers and Viewers"

■ Section 3.3.2, "Removing Workspace Access From a Workspace Manager or Viewer"

Figure 3–2   Security Tab Displays Workspace Managers and Viewers With Workspace Access

3.3.1 Granting Workspace Access to Workspace Managers and Viewers

To grant workspace access to another manager or a workspace viewer:

1. Click the **Security** tab in a selected workspace.

    The Workspace Users table lists managers and viewers with access to the workspace, including yourself. To sort the **User/Groups** column, click one of the triangles in the column.

    A green check mark indicates an access level of Workspace Manager or Workspace Viewer.

2. Click the **Add** button. The Add Security Member window displays.

3. In the **Capture Roles** field, select **Capture Workspace Manager** to grant access to a manager or **Capture Workspace Viewer** to grant access to a viewer.

4. In the left field below, select **Search Groups** or **Search Users** to find members belonging to the selected Capture 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**. The added member displays in the table.

Figure 3–3   Granting Workspace Access to a Group or User Assigned a Capture Role
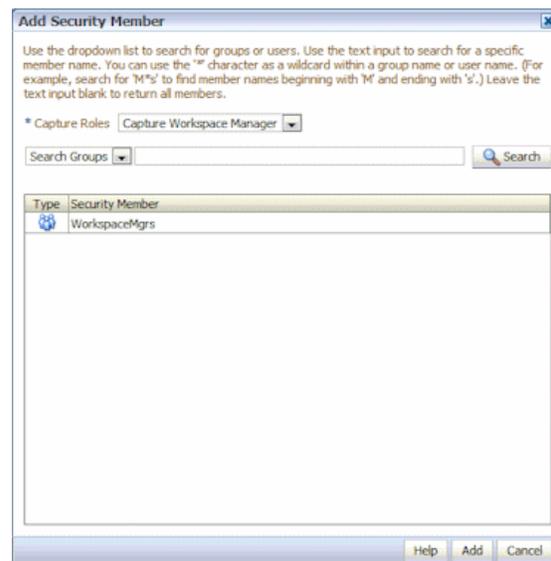
3.3.2 Removing Workspace Access From a Workspace Manager or Viewer

Removing workspace access means that the manager or viewer can still access the workspace console, but the selected workspace is no longer available and visible to the manager or viewer.

> **Note:**   You cannot remove your own workspace access. Each workspace must have at least one workspace manager with access.

To remove a manager's or viewer's workspace access:

1. Click the **Security** tab in a selected workspace.

2. In the Workspace Users table, select the manager or viewer whose access you want to remove.

3. Click the table's **Delete** button. When prompted, confirm the deletion.

3.4 Managing Metadata Fields

An integral part of creating a workspace is defining its metadata fields. Client users enter values in these fields while indexing, and batch processors assign values to these fields during processing. Typically, users later search for documents in a content management system using these fields.

You can configure metadata fields in a variety of ways. Metadata fields can be required, 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, selected from choice lists, populated by a JavaScript, or selected from a database lookup.

Figure 3–4 Metadata Fields Defined for a Workspace

This section describes the following topics:

- Section 3.4.1, "Adding or Editing a Metadata Field"
- Section 3.4.2, "Deleting a Metadata Field"
- Section 3.4.3, "Configuring a Metadata Field's Input Mask"
- Section 3.4.4, "Configuring a Metadata Field's Display Format"

- Section 3.4.5, "Setting Metadata Fields to Auto Populate"

- Section 3.4.6, "Configuring Regular Expression Validation"

3.4.1 Adding or Editing a Metadata Field

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

To add or edit a metadata field:

1. Click the workspace's **Metadata** tab.

2. In the Metadata Fields table, click the **Add** button. To edit a field, select it in the table and click the **Edit** button.

   The Metadata Field screen is displayed.

3. In the **Field Name** field, enter a name for the metadata field.

4. In the **Data Type** field, select a type for the field. You can choose: Alpha Numeric, Numeric, Date, or Float.

5. To require that the field be completed, select the **Required** field. A document's required fields must contain values to be committed by the Commit Processor.

6. Complete other fields as needed.

   - To configure an input mask, see Section 3.4.3.

   - To configure a display format, see Section 3.4.4.

   - To configure auto populating, see Section 3.4.5.

   - To configure and test a regular expression validation, see Section 3.4.6.

7. In the choice list fields, identify previously created sources and choice lists for the metadata field. See Section 3.5.1 and Section 3.6.1.

8. To configure a database lookup for a metadata field, see Section 3.8.1.

9. When done, click **Submit**.

3.4.2 Deleting a Metadata Field

Deleting a metadata field permanently removes it from the workspace. 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.

To delete a metadata field from a selected workspace:

1. Click the workspace's **Metadata** tab.

2. In the right pane, select the metadata field to delete from the Metadata Fields table, and click the **Delete** button.

3. Click **Yes** to confirm the deletion.

   The metadata field is removed from the workspace.

3.4.3 Configuring a Metadata Field's Input Mask

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

To set up an input mask that controls what users can enter into a metadata field:

1. Add or edit a metadata field as described in Section 3.4.1.

   To apply an input mask, the metadata field's data type must be Alpha Numeric, Numeric, or Float.

2. In the **Input Mask** field on the Metadata field screen, enter any of the available mask characters listed in Table 3–2 (alphanumeric) or Table 3–4 (numeric or float).

   Any other characters you type are displayed exactly as typed.

3. Click **Submit** to save the metadata field's settings.

4. Use and test the metadata field's input mask in the workspace (for example, in a client profile).

Table 3–2   Alphanumeric Input Mask Characters

Mask Character	Description
#	Requires a number to be entered.
' (single quote)	Escape character, used to escape 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 3–3   Alphanumeric Input Mask Examples

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

Table 3–4 lists numeric and float input masks.

Table 3–4   Numeric and Float Input Mask Characters

Mask Character	Description
0	Requires a digit to be entered.
#	Requires a digit to be entered. Zero shows as absent.
.	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.

> **Notes:** 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. That 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#`).
>
> For client users to change a number's sign, they must enter the number first, then press the + or the - key.

Table 3–5   Numeric and Float Input Mask Examples

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

3.4.4 Configuring a Metadata Field's Display Format

A display format provides a way to ensure that data entered by users displays in a certain format. When the user moves to another metadata field, Capture changes the data display, if needed, to match the specified display format. For example, you might format a date field to display a standard date format. Note that the metadata value Capture saves is not changed.

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

1. Add or edit a metadata field as described in Section 3.4.1.

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

2. On the Metadata field screen, click **Select Display Format**. Select from the available formats for the data type, listed in Table 3–6.

3. Click **Submit** to save the metadata field's settings.

4. Use the metadata field's display format in a client profile.

Table 3–6   Input Formats

Input Format	Data Type	Description
Currency	Float	Number formatted using the system locale's 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's short date format. Date display is determined by the system locale settings.
Medium Date	Date	Date using the system's medium date format. Date display is determined by the system locale settings.
Long Date	Date	Date using the system's 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.
Medium Time	Date	Time in 12-hour format using hours and minutes and the AM/PM designator.
Long Time	Date	Time using the system's 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

3.4.5 Setting Metadata Fields to Auto Populate

You can configure metadata fields to automatically fill (populate) with 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 if needed.

To configure a metadata field to auto populate:

1. Add or edit a metadata field as described in Section 3.4.1.

2. In the **Auto Populate Type** field on the Metadata Field screen, select a type for the metadata field. The available auto populate types depend on the selected metadata field's type, as listed in Table 3–7.

Table 3–7   Auto Populate Types by Metadata Data Type

Auto Populate Type	Data Type	Description
Batch Name	Alpha Numeric	Populates the metadata field with the batch name assigned by Capture.
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.
Computer Name	Alpha Numeric	Populates the metadata field with the name of the computer used when the document was created.
Profile Name	Alpha Numeric	Populates the metadata field with the client profile used to capture the batch.
Batch Status	Alpha Numeric	Populates the metadata field with the batch's assigned status (if any).
Document Profile	Alpha Numeric	Populates the metadata field with the selected document's assigned document profile name.
Default Value	Alpha Numeric, Numeric, Date, Float	Populates the metadata field with the value specified in the **Default Value** field.
Batch Priority	Alpha Numeric, Numeric, Float	Populates the metadata field with the batch's assigned priority.
Scan Date	Date	Populates the metadata field with the date on which the document was captured.
Current Date	Date	Populates the metadata field with the current date.

3. If you selected **Default Value** as the auto populate type, enter a value in the **Default Value** field.

4. Click **Submit** to save the metadata field's settings.

5. Use and test the metadata field's auto populating in the workspace (for example, in a client profile).

3.4.6 Configuring Regular Expression Validation

A regular expression ensures that data entered matches a certain format. For example, to match a value of a, b, or c, you would enter:

```
[abc]
```

Note that regular expressions in metadata fields apply only to alphanumeric type fields. For more information, refer to 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 as described in Section 3.4.1.

2. On the Metadata field screen, enter an expression in the **Regular Expression** field.

3. Test the regular expression. Enter a sample value in the **Sample Value** field and click **Validate**. A result of valid or invalid displays next to the **Results** read-only field.

4. Click **Submit** to save the metadata field's settings.

5. Use and test the metadata field's regular expression in the workspace (for example, in a client profile).

3.5 Managing User Defined Choice Lists

A choice list provides users with values from which to choose. 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 Capture areas.

You can create these types of choice lists:

- **User-Defined Choice Lists**. Use this type to enter and maintain values in the Capture database. Note that you can import choice list values into the Capture database from a text file as well as export choice list values to a text file.

- **Database Choice Lists**. Use this type to display choice list values dynamically retrieved from an external database. See Section 3.6.

Figure 3–5   User Defined Choice List with Correspondence Choices
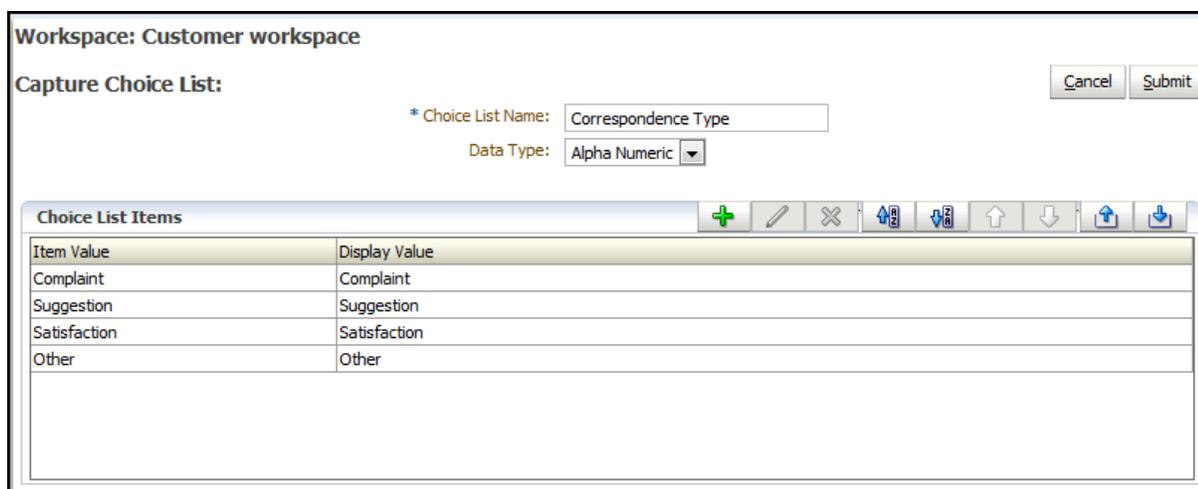
This section covers the following topics:

- Section 3.5.1, "Adding or Editing a User Defined Choice List"

- Section 3.5.2, "Importing Values From a Text File Into a Capture Choice List"

- Section 3.5.3, "Exporting Capture Choice List Values to a Text File"

- Section 3.5.4, "Deleting a User Defined Choice List or Items"

- Section 3.5.5, "Using User Defined Choice Lists in Capture"

3.5.1 Adding or Editing a User Defined Choice List

Follow these steps to configure a user defined choice list for use in Capture. User defined choice lists are stored within the Capture database.

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

1. Click the workspace's **Metadata** tab.

2. Under **User Defined Choice Lists**, select **Document Capture** in the table and click the **Edit** button.

3. On the Choice List Type screen, click the **Add** button to add a choice list, or edit one by selecting it and clicking the **Edit** button.

4. On the Capture Choice List screen, enter a name in the **Choice List Name** field (for example, `Correspondence Type`). Select a type in the **Data Type** field (Alpha Numeric, Numeric, Date, or Float).

   > **Note:** To display the choice list's values in a metadata field, the choice list must have the same data type as the metadata field.

5. In the Choice List Items table, click the **Add** button to add a choice list item.

6. In the Choice List Item Properties window, 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 item's **Display Value** field. To display the same value to users, click OK without entering a value in the **Display Value** field. Repeat steps 5 and 6 to add additional choice items.

   For information about importing or exporting choice list items, see Section 3.5.2 or Section 3.5.3.

7. 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.

8. Click **Submit**.

   The new choice list is displayed in the Defined Choice Lists table. Click **Close**.

9. Use the choice list in Capture. See Section 3.5.5.

   To use the choice list in a metadata field:

   a. Add or edit a metadata field, as described in Section 3.4.1.

   b. On the Metadata Field screen, select **Capture Source** in the **Choice List Source** field.

   c. In the **Choice List** field, select the choice list you created.

   d. Select the **Locked** field, if needed. In this case, locking the metadata field restricts users to selecting an item from the choice list.

3.5.2 Importing Values From a Text File Into a Capture Choice List

Follow these steps to import values from a text file into a user defined choice list. Capture imports UTF-8 text files where 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, a TAB character must be used to separate the values within an import record line.

1. Add or edit a user defined choice list as described in Section 3.5.1.

   a. On the workspace's **Metadata** tab, select **Document Capture** in the User Defined Choice Lists table and click the **Edit** button.

    b. In the Defined Choice Lists table, click the **Add** or **Edit** button to add or edit a choice list.

2. In the Choice List Items table, click the **Import** button.

3. In the Import Choice List Items window, click the **Browse** button, locate the file to import, and click **Open**.

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

> **Note:** Importing large choice lists takes longer when this option is selected.

5. Click **Process**.

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

6. Click **Close**.

3.5.3 Exporting Capture Choice List Values to a Text File

Follow these steps to export values from a user defined choice list to a text file. Capture writes a selected choice list's values to a delimited text file.

1. Edit a user defined choice list as described in Section 3.5.1.

    a. On the workspace's **Metadata** tab, select **Document Capture** in the User Defined Choice Lists table and click the **Edit** button.

    b. In the Defined Choice Lists table, select a choice list and click the **Edit** button.

2. On the Capture Choice List screen, click the **Export** button. A message displays asking if you want to open or save the export.txt file. Choose save options.

The text file is written to the specified location.

3.5.4 Deleting 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.

1. To delete a choice list, select it in the Defined Choice Lists table and click the **Delete** button. Confirm the deletion.

2. To delete a choice list item, select the choice list in the Defined Choice Lists table and click the **Edit** button. In the Choice List Items table, select an item and click the **Delete** button. Confirm the deletion. Click **Submit**.

3.5.5 Using User Defined Choice Lists in Capture

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

- Use them in Capture profiles or batch processor jobs, as listed in Table 3–8.
- Define dependencies between them, as described in Section 3.7.

Table 3–8   User Defined Choice List Use in Capture

Capture Component	Choice List Type	How Used
Client Profiles	Choice List	Use choice lists in metadata fields. See Section 3.4.1.
	Dependent Choice List	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 Section 3.7.1).
Recognition Processor	Choice List	Assign a bar code value that matches a choice list value to a metadata field. See Section 7.4.1.
Content Server Commit Profile	Choice List	Dynamically assign a type, security and/or account based on a choice list metadata field value. See Section 8.7.4.3.

3.6 Managing Database Choice Lists

A choice list provides users with values from which to choose. 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 profile or processor job. This allows you to use the same choice list in multiple Capture areas. Database Choice Lists will retrieve all records from the configured database table/view. For example, you would not want to configure a database choice list with thousands of records because it may cause noticeable delays in the client. Instead, consider using a Database Lookup Profile instead.

You can create these types of choice lists:

- **User-Defined Choice Lists**. Use this type to enter and maintain values in Capture. See Section 3.5.

- **Database Choice Lists**. Use this type to display choice list values dynamically retrieved from an external database. This is useful when choice list values are subject to change, since a database choice list displays current values from a database table.

Figure 3–6   Database Choice List for Product Family List

This section covers the following topics:

- Section 3.6.1, "Adding or Editing a Database Choice List"
- Section 3.6.2, "Deleting Database Choice List Sources and Choice Lists"
- Section 3.6.3, "Using Database Choice Lists in Capture"

3.6.1 Adding or Editing a Database Choice List

Follow these steps to configure a database choice list. Database choice lists provide choices from a linked database table or view.

To configure a database choice list, you need a data source, which is typically configured by a system administrator. You first connect to a data source and then identify how you want the database's values used. For more information about JDBC data sources, see *Oracle Fusion Middleware Configuring and Managing JDBC Data Sources for Oracle WebLogic Server*.

To add or edit a database choice list:

1. Click the workspace's **Metadata** tab.

2. In the Database Choice Lists table, select **Database** and click the **Edit** button.

3. On the Choice List Type screen, click the **Add** button in the Choice List Sources table to add a source. To edit a source, select one in the table and click the **Edit** button.

4. On the Choice List Source screen, enter a name for the source in the **Choice List Name** field (for example, `Product source`).

5. In the **JNDI** field, enter the data source to connect to, and click **Connect**.

   After Capture connects to the data source, it updates the **Status** field below the **Connect** button. Use the Defined Choice Lists table to add or edit a choice list that uses the source.

6. Click the **Add** button in the Defined Choice Lists table.

7. In the Database Choice List Properties window, enter a name in the **Choice List Name** field.

8. In the **Schema** and **Table** fields, identify the schema and table from the data source to use for the choice list.

9. In the **Item Value** field, identify the table column whose data will display in the choice list. In the **Display Value** field, enter an alternate value to display to users in the choice list; this value is often the same as the item value.

10. In the **Sort Order** field, specify whether the data should display in ascending or descending order, and click **OK**.

    The choice list displays in the Defined Choice Lists table.

11. Click **Submit**.

    You return to the Choice List Sources screen, with the new source displayed. Note that you can create additional choice lists for the data source you specified or create choice lists for other data sources.

12. Use the choice list in Capture. See Section 3.6.3.

    To use the choice list in a metadata field:

    a. Add or edit a metadata field, as described in Section 3.4.1.

    b. On the Metadata Field screen, select the source you created in the **Choice List Source** field.

    c. In the **Choice List** field, select the choice list you created.

    d. Select the **Locked** field, if needed. In this case, locking the metadata field restricts users to selecting an item from the choice list.

3.6.2 Deleting Database Choice List Sources and Choice Lists

Follow these guidelines:

- Deleting a choice list source makes it no longer available for creating choice lists and deletes all choice lists that use it.

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

To delete a database choice list *source*:

1. On the workspace's **Metadata** tab, select the top Database entry in the Database Choice Lists table and click the **Edit** button. The list of sources displays.

2. In the Choice List Sources table, select a source and click the **Delete** button. Confirm the deletion.

3. Click **Close**.

To delete a database *choice list*:

1. On the workspace's **Metadata** tab, select the choice list to delete in the Database Choice Lists table. (The choice list name displays in the Choice List column.) Click the **Edit** button.

2. In the Defined Choice Lists table, select a choice list and click the **Delete** button. Confirm the deletion.

3. Click **Submit**.

3.6.3 Using Database Choice Lists in Capture

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

- Use them in client profiles or batch processor jobs. See Table 3–9.

- Define dependencies between them, as described in Section 3.7.

Table 3–9   Database Choice List Use in Capture

Capture Component	Choice List Type	Function
Client Profiles	Choice List	Use choice lists (user defined and database) in metadata fields.
	Dependent Choice List	Create dependent choice list metadata fields, where a selection in the parent field determines the values displayed in the child choice list field.
Recognition Processor	Choice List	Assign a bar code value that matches a choice list value to a metadata field.
Content Commit Profiles	Choice List	Dynamically assign a type, security and/or account based on a choice list metadata field value.

3.7 Managing 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. As shown in the example in Figure 3–7, when a client user selects *Household* from the Products parent metadata field, the dependent *Subproducts* child metadata field displays household subproducts from which to choose.

You create the dependent choice list and its associated choice lists on the **Metadata** tab, then select the dependent choice list in a client profile, as described in Section 3.7.1.

Figure 3–7   Dependent Choice List Result in Client's Metadata Pane
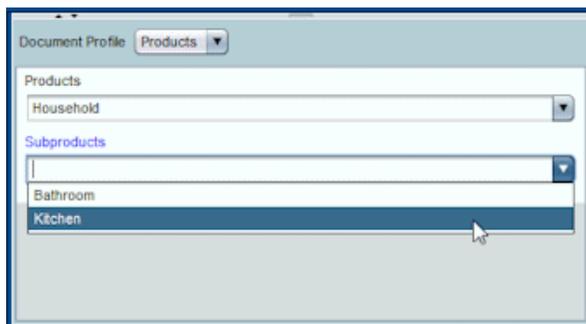
Important Points About Choice List Dependencies

- You can create choice list dependencies between Capture user defined choice lists, database choice lists, or between choice list types.

- 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.

This section covers the following topics:

- Section 3.7.1, "Adding or Editing a Dependent Choice List"

- Section 3.7.2, "Deleting Dependent Choice Lists"

3.7.1 Adding or Editing a Dependent Choice List

Follow these steps to create a parent/child dependency between choice lists.

1. On the **Metadata** tab, create the choice lists. See Section 3.5 to create user defined choice lists or Section 3.6 to create database choice lists.

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

   In our example, we created the following user defined choice lists:

Parent or Child	Choice List Name	Choices
Parent	Products	■ Automotive ■ Household
Child	Automotive Subproducts	■ Cars ■ Motorcycles
Child	Household Subproducts	■ Bathroom ■ Kitchen

2. On the **Metadata** tab, create the metadata fields to contain the choice lists (Section 3.4.1).

   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 screen for the parent field, choose a source in the **Choice List Source** field. In the **Choice List** field, select the choice list you created as the parent in step 1. In our example, we chose **Products** as the choice list.

   b. On the Metadata Field screen for the child field, choose the parent metadata field in the **Parent Choice List Field**. In our example, we chose **Products** as the parent metadata field.

      c. To prevent users from typing in an entry instead of selecting a choice from the list, select the **Locked** field.

3. On the **Classification** tab, create a document profile that uses the metadata fields you created in step 2 (Section 3.10.1).

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.

      a. Scroll near the bottom of the tab and click the **Add** button in the Dependent Choice Lists table. On the Dependent Choice List screen, enter a name for the dependency, such as `Product/subproduct dependency`.

      b. In the Defined Dependent Choice Lists table, click the **Add** button. Complete 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).
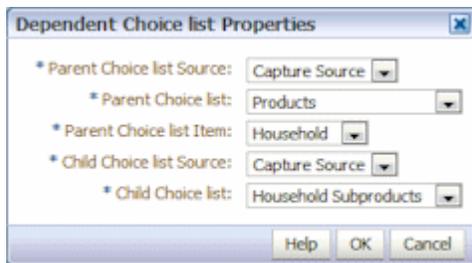
      c. Click the **Add** button and complete fields for the second dependent choice, identifying another parent choice list item (Automotive) and the child list that displays when the user selects it (Automotive Subproducts).
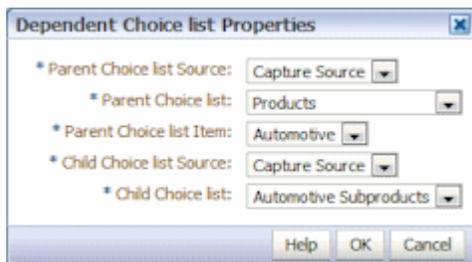
      d. Click **OK**.

Workspace: Customer workspace

Dependent Choice List: New dependent choice list   Cancel Submit

* Dependent Choice List Name: product/subproduct dependency

Defined Dependent Choice Lists

Choice List Source	Choice List	Choice List Item	Child Choice List Source	Child Choice List
Capture Source	Products	Household	Capture Source	Household Subproducts
Capture Source	Products	Automotive	Capture Source	Automotive Subproducts

5. Click **Submit**.

6. On the **Capture** tab, add or edit a client profile that uses the document profile and choice list dependency you created (Section 4.2).

    a. On the **General Settings** train stop, select a profile type of **2 - Capture and Index** or **3 - Index Only**. Enter a name and batch prefix.

    b. On the **Document Indexing Settings** train stop, select the dependency you created in the **Dependent Choice List** field. Select the document profile you created in the **Document Profiles** field.

    c. On the **Security** train stop, grant a Capture user login access to the client profile.

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

7. Test the choice list dependency in the client.

    a. Sign in to the client.

    b. Select the client profile you created and capture a batch.

    c. Expand the batch and select a document.

    d. In the metadata pane, try out the choice list dependency.

3.7.2 Deleting 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 the **Delete** button.

2. When prompted, click **Yes** to confirm the deletion.

3.8 Managing Database Lookups

A database lookup searches an external database for a specified value (specified by a client user or a processor) and populates metadata fields from a matching database record. For example, you might configure a database lookup that searches a database for a matching customer ID, then returns the matching record's full customer name and address.

Database lookups can eliminate data entry of certain fields and ensure data integrity resulting in improved efficiency and data entry quality. When used in a client profile, as shown in Figure 3–8, a user enters a value in a metadata field and clicks the **Database Lookup** button in the client window's document pane. Capture searches the specified database field for a matching value, and if found, automatically populates other specified metadata fields.

You configure database lookups for the workspace, then select them when configuring client profiles or processor jobs. Note these guidelines:

- If a single matching record is found in the database, the fields are automatically populated, unless the client profile's **Always Display Records** field is selected. If Capture finds multiple values that match, it displays them in a results list from which the user chooses.

- Capture provides flexibility in database searching. For example, you can configure multiple search fields, providing the user with multiple means of matching a database record. In addition, you can map metadata fields to different tables within a database.

Figure 3–8   Database Lookup in Use in the Client
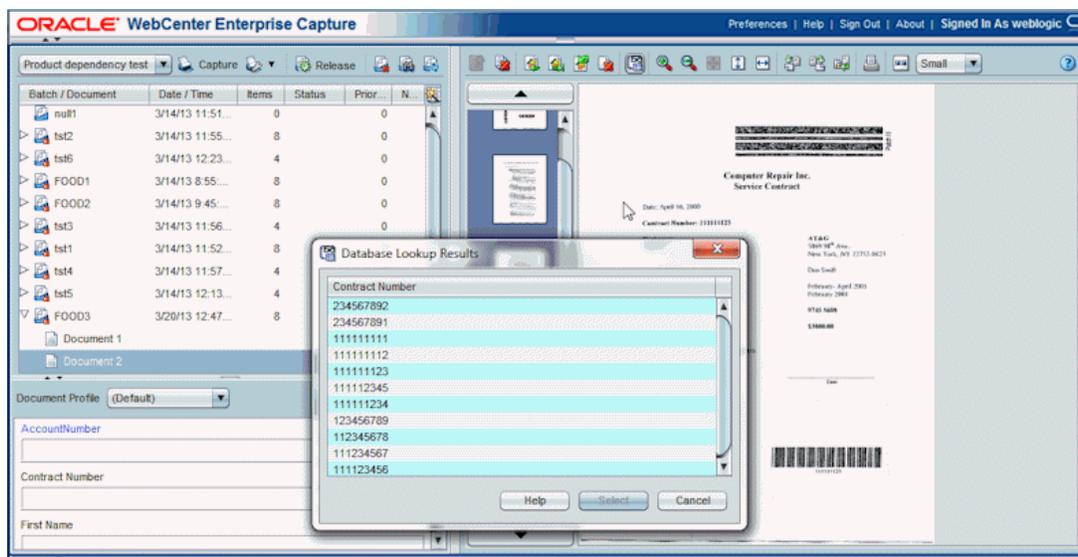
This section covers the following topics:

- Section 3.8.1, "Adding or Editing a Database Lookup"

- Section 3.8.2, "Deleting a Database Lookup or its Search or Return Fields"

- Section 3.8.3, "Using Database Lookups in Capture"

3.8.1 Adding or Editing a Database Lookup

To configure a database lookup, you need a data source, which is typically configured by a system administrator. You first connect to a data source and then identify how to search for matching values and values to return. For more information about JDBC data sources, see *Oracle Fusion Middleware Configuring and Managing JDBC Data Sources for Oracle WebLogic Server*.

To configure a database lookup:

1. In a selected workspace, create the metadata field on which to configure the database lookup. Also create any metadata fields that the database lookup will populate. For more information, see Section 3.4.

   For example, you might create a database lookup that searches a Customer ID field and from a matching database record, returns and populates customer name and address fields.

2. On the **Metadata** tab, scroll to the bottom. In the Database Lookup Profiles table, click the **Add** button. To edit a lookup, select one and click the **Edit** button.

3. Select settings on the **General Setting** train stop.

   a. Enter a name in the **Database Lookup Name** field.

   b. In the **JNDI Name** field, enter the name of a data source to connect to, and click **Connect**. The status changes to *Connected*, followed by the source name.

4. On the **Search Fields** train stop, use the Search Field Definitions table to identify the database field(s) to search for values matching those in Capture metadata fields.

   > **Note:** Capture metadata fields must have a data type that is compatible with the data type of the database fields whose values will be searched.

   a. Click the **Add** button or select a search field definition and click the **Edit** button. To delete a definition, select it and click the **Delete** button, and when prompted, confirm the deletion.

   b. In the **Search Field Settings** window, complete the fields.

      – In the **Capture Field** option, select the Capture metadata field on which to activate the database lookup.

      – For the database field, select its schema and table, then select the database field to search in the **Database Field**.

      – Use the remaining fields to specify search and sort options as needed.

Figure 3–9   Configuring a Database Lookup's Search Fields
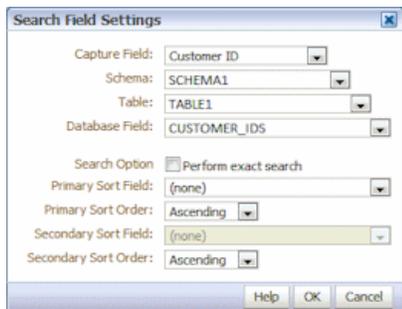
    c. Repeat steps a and b to optionally set up additional search fields.

5. On the **Return Fields** train stop, identify the database values to return from the database. You must specify return fields for each search field you defined in step 4.

    a. In the Return Field Definitions table, choose a field in the **Search Field** option adjacent to the buttons, and click the **Add** button.

    b. In the Return Field Settings window, select the **Capture Field** to populate from the list of metadata fields for the workspace.

    c. In the **Database Field** option, select the field to return from the list of fields in the specified table.

    d. Repeat steps a through c to configure each return field.

    e. In the Return Field Definitions table, use the up and down arrow buttons to order the fields in the order in which to return values in the results list.

Figure 3–10   Configuring a Database Lookup's Return Fields
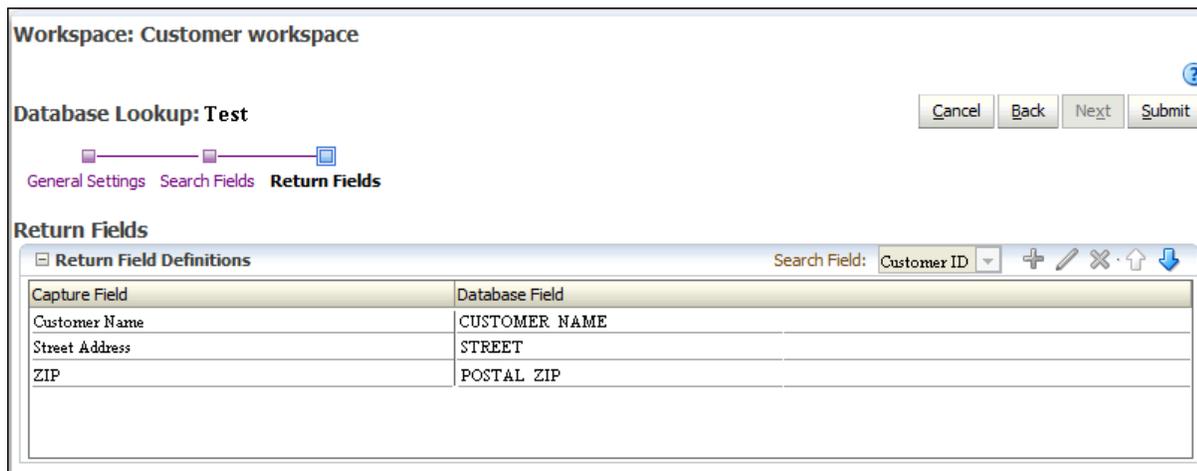
6. Click **Submit** to save the database lookup profile.

7. Use the database lookup in a client profile or processor job. See Section 3.8.3.

To use the lookup in a client profile:

    a. Add or edit a client profile, as described in Chapter 4. On the **General Settings** train stop, select a profile type of **2 - Capture** and **Index or 3 - Index Only**.

    b. On the **Document Indexing Settings** train stop, select the lookup in the **Database Lookup Profile** field.

    c. On the **Security** train stop, grant a Capture user login access to the client profile.

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

    e. In the client, test the lookup by clicking the metadata field on which the lookup was configured; the **Database Lookup** button in the document pane should be for defined search fields.

3.8.2 Deleting a Database Lookup or its Search or Return Fields

Deleting a database lookup makes it no longer available in client profiles or processor jobs if in use.

Follow these steps to delete a database lookup profile.

1. In a selected workspace, click the **Metadata** tab.

The Database Lookup Profiles table lists lookup profiles defined for the workspace.

2. Delete or edit the lookup profile.

To delete a profile, select it and click the **Delete** button. Confirm the deletion.

3. To edit a profile, select it and click the **Edit** button. Select a train stop, make changes, and click Submit. For example, edit or delete the lookup's searching on the **Search Fields** train stop or its return values on the **Return Fields** train stop.

3.8.3 Using Database Lookups in Capture

After creating one or more database lookups, you can then use them as listed in Table 3–10.

Table 3–10   Database Lookup Use in Capture Components

Capture Component	Function
Client	Search a database for a matching record and if found, populate metadata fields with other values in the database record.
Import Processor	After importing images, search a database field for matching metadata values (from a list file) and populate metadata fields from the database table. See Section 5.9.
Recognition Processor	Search a database using a bar code value and populate metadata fields using values returned from it. See Section 7.7.

3.9 Managing Batch Statuses

The batch status feature provides a standardized method of assigning statuses to batches. On the **Classification** tab, you create a list of possible statuses for the workspace, which can be used in various ways in Capture.

This section covers the following topics:

- Section 3.9.1, "Adding or Editing a Batch Status"
- Section 3.9.2, "Deleting a Batch Status"
- Section 3.9.3, "Using Batch Status in Capture"

Figure 3–11   Defining Batch Statuses for the Workspace
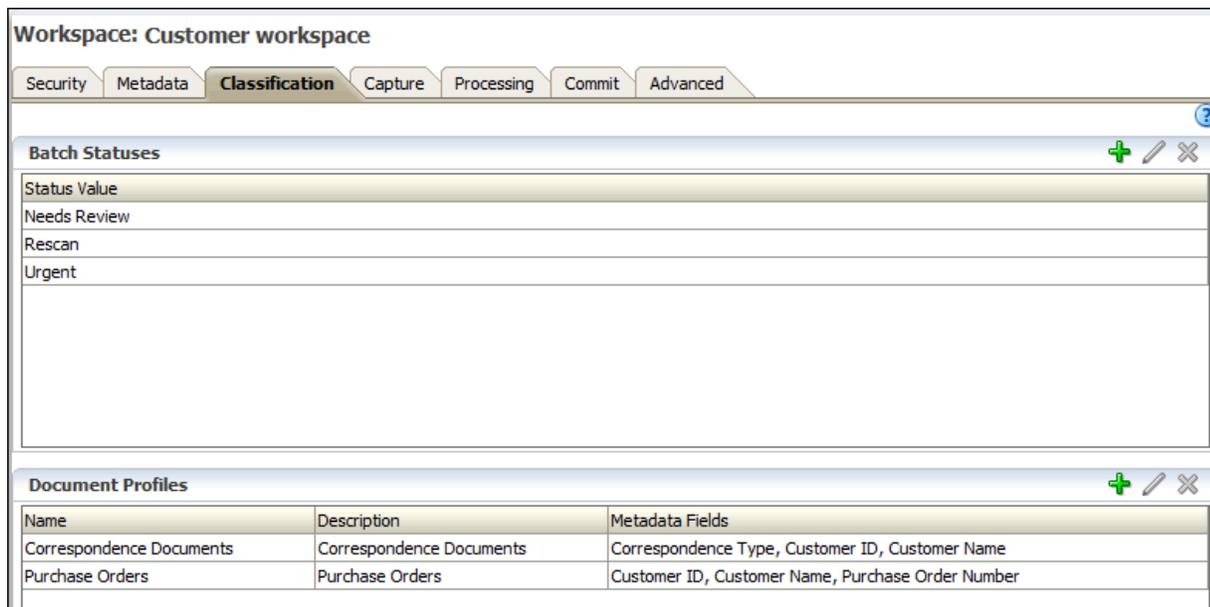
3.9.1 Adding or Editing a Batch Status

Adding a status to a workspace makes it available for assigning to batches in profiles or processor jobs and to users for assigning when working with batches.

To add or edit a batch status:

1. In a selected workspace, click the **Classification** tab.

    The Batch Statuses table lists statuses defined for the workspace.

2. Click the **Add** button to add a batch status. To edit a batch status, select one and click the **Edit** button. Note that editing a batch status changes it throughout a Capture workspace.

3. In the **Status** field of the Add/Edit Batch Status window, enter a status and click **OK**.

3.9.2 Deleting a Batch Status

Deleting a batch status makes it unavailable to assign in client profiles and processors and for users to assign to batches.

To delete a batch status:

1. In a selected workspace, click the **Classification** tab.

    The Batch Statuses table lists statuses defined for the workspace.

2. Select the status to delete and click the **Delete** button. When prompted, confirm the deletion. The status is deleted and no longer available.

3.9.3 Using Batch Status in Capture

Below are ways you can use batch statuses in a workspace.

- In a client profile, you can assign a default status that gets assigned to batches when they are created.

- Client users can change batch status, selecting from possible statuses listed, or search for batches based on their status.

- Some Capture batch processors can change batch status after successful or failed processing.

- Batch status can be output as metadata upon commit.

3.10 Managing Document Profiles

A document profile specifies the set of metadata fields, from those configured for the workspace, to use to index a specific type of document. For example, for a workspace 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. If users will scan batches that contain multiple document types, select each document profile in the client profile that may apply, so that indexing users can choose the document profile that corresponds to the document and index it accordingly.

When specifying document profiles during configuration (for example, when configuring 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 defined for the workspace, and is useful for troubleshooting purposes.

This section covers the following topics:

- Section 3.10.1, "Adding or Editing a Document Profile"

- Section 3.10.2, "Deleting a Document Profile"

- Section 3.10.3, "Using Document Profiles in Capture"

Figure 3–12   Defining a Document Profile

3.10.1 Adding or Editing a Document Profile

To add or edit a document profile:

1. In a selected workspace, click the **Classification** tab.

2. In the Document Profiles table, click the **Add** button.

   To edit a profile, select one and click the **Edit** button. Note that client users currently running the client do not see document profile changes until they sign out of the client and sign back in.

3. Complete fields on the Document Profile screen.

   a. Enter a name for the document profile in the **Name** field.

   b. In the Metadata Fields list, select the fields to include in the profile, and move them using the arrow buttons. Use the up and down arrow buttons to order the metadata fields in the order in which an indexing user will read and index documents.

4. Click **Submit**.

3.10.2 Deleting a Document Profile

Deleting a document profile makes it no longer available for use. For example, client users no longer see a deleted document profile in the metadata pane. Note that client users currently running the client do not see document profile changes until they sign out of the client and sign back in.

To delete a document profile:

1. In a selected workspace, click the **Classification** tab.

   The Document Profiles table lists profiles defined for the workspace.

2. Select a profile to delete and click the **Delete** button. Confirm the deletion.

3.10.3 Using Document Profiles in Capture

After creating a document profile for each document type to be indexed, you can select them in Capture areas where metadata fields are assigned, as listed in Table 3–11.

Table 3–11   Document Profile Use in Capture Components

Capture Component	Function
Client Profile	Select one or more document profiles on the **Document Indexing Settings** train stop to allow users to select a document profile and complete its metadata fields. See Section 4.14.
Import Processor	Select the document profile to use to index imported documents. See Section 5.8.
Recognition Processor	Select the document profile to use to index recognized documents. You can even dynamically determine the document profile. See Section 7.5.
Commit Profile	Restrict the documents that the commit profile outputs by selecting one or more document profiles. When the commit profile runs, Capture only commits documents assigned the selected document profiles. See Section 8.5.

3.11 Managing Capture Scripts

Capture scripts are JavaScripts that enable you to customize Capture functionality in the following components:

- Capture Client
- Recognition Processor
- Import Processor

Typically, a Java developer writes one or more scripts, following instructions in *Oracle Fusion Middleware Developing Scripts for Oracle WebCenter Enterprise Capture*. A workspace manager imports the scripts on the workspace's **Advanced** tab, then selects the script in a client profile or Import Processor job or Recognition Processor job.

Figure 3–13   JavaScripts Imported for Use in Client Profiles or Processor Jobs

This section covers the following topics

3.11.1 Importing or Changing a Script

Follow these steps to import or change a script:

1. In a selected workspace, click the **Advanced** tab.

    The Scripts table lists JavaScripts imported for the workspace.

2. Click the **Add** button. To change a script, select it in the table and click the **Edit** button. The Script screen displays.

3. In the **Type** field, select the Capture component in which to use the script. You can choose: Capture Client, Recognition Processor, or Import Processor.

4. In the **Name** field, enter a name to identify the script in Capture.

5. In the **Script File Name** field, import the script file. Click **Browse** and locate the file.

6. Click **Submit**. The imported script now displays in the Scripts table.

3.11.2 Exporting a Script

If needed, follow these steps to export a script in the Scripts table. For example, you might do this to verify or modify the script's behavior.

1. In a selected workspace, click the **Advanced** tab.

2. In the Scripts table, select a script to export, and click the **Export Selected Script** button.

3. From the open/save options that display, save the script file. The selected script is saved as a text (.txt) file.

3.11.3 Removing a Script

Removing a script from the Scripts table makes it unavailable for assigning to a client profile or processor job. Before removing a script, ensure that it is not being used by a client profile or job. If you remove a script that is currently assigned to a client profile, import job or recognition job, errors may result.

To remove a script:

1. In a selected workspace, click the **Advanced** tab.

   The Scripts table lists JavaScripts saved for the workspace.

2. In the Scripts table, select one or more scripts to remove.

3. Click the **Delete Selected Script** button. When prompted, confirm the deletion.

3.11.4 Using Scripts in a Client Profile

To use one or more scripts in a client profile:

1. On the **Advanced** tab, import the script as described in Section 3.11.1, selecting **Capture Client** in the **Type** field.

2. Click the **Capture** tab and add or edit a client profile as described in Section 4.2.

3. On the client profile's **Extension Profiles** train stop, add, edit, delete, or order client scripts in the Extension Profiles table.

   a. To add a script, click the **Add** button. In the Extension Profile Setting window, enter a description, choose **Capture Java Script Extension** in the **Extension Type** field, and select the script. Repeat to include additional scripts.

   b. Use the up and down arrow buttons to reorder selected scripts. When a client profile is used, scripts are executed in the order shown in this table.

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

4. In the client, test the client profile script's functionality.

3.11.5 Using a Script in a Recognition Processor Job

To use a script in a recognition job:

1. On the **Advanced** tab, import the script as described in Section 3.11.1, selecting **Recognition Processor** in the **Type** field.

2. Click the **Processing** tab and add or edit a Recognition Processor job as described in Section 7.2.1.

3. On the recognition job's **General Settings** train stop, select the recognition script in the **Script** field. Click **Submit** to save the recognition job.

4. Run the processor job to test the script's functionality.

3.11.6 Using a Script in an Import Processor Job

To use a script in an Import Processor job:

1. On the **Advanced** tab, import the script as described in Section 3.11.1, selecting **Import Processor** in the **Type** field.

2. Click the **Capture** tab and add or edit an Import Processor job as described in Section 5.2.

3. On the import job's **General Settings** train stop, select the import script in the **Script** field. Click **Submit** to save the import job.

4. Run the processor job to test the script's functionality.

4

Managing Client Profiles

A client profile contains the settings used when end-users select it to scan, import, and/or index documents in the client. Client profiles control such things as how documents are created and separated in batches, whether metadata fields are available and required, and what happens next to batches after users release them. You build client profiles using workspace elements you create and manage, as described in Chapter 3.

To configure automated importing, see Chapter 5. To configure automated indexing via bar code recognition, often occurring after bulk scanning in the client, see Chapter 7.

This chapter includes the following sections:

- Introduction to Client Profiles
- Adding, Editing, or Copying a Client Profile
- Deleting a Client Profile
- Deactivating and Activating Client Profiles
- Configuring a Client Profile's Type For Capture, Index, or Both
- Filtering the Batch List Displayed to Users
- Configuring Image Capture and Storage
- Configuring Blank Page Detection
- Configuring Non-Image File Capture Settings
- Configuring Document Creation
- Configuring Separator Sheet Use
- Using a Database Lookup in a Client Profile
- Using a Dependent Choice List in a Client Profile
- Configuring Document Profiles in Client Profiles
- Customizing Client Profiles Using JavaScript Extension Profiles
- Managing Client Profile Security
- Configuring a Client Profile's Post-Processing

4.1 Introduction to Client Profiles

To configure a client profile, you identify settings on the profile's train stops, as shown in Figure 4–1 and described in Table 4–1.

Figure 4–1   Client Profile Configuration by Train Stop

Table 4–1   Client Profile Configuration by Train Stop

Train Stop	Main Configuration
General Settings	Select key profile settings such as: ■ Whether users use the client profile to capture (scan or import), capture and index documents, or index documents only (see Section 4.5) ■ The client profile name that displays to client users ■ How batches captured with this client profile are named
Batch Filter Settings	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 Section 4.6).
Image Settings	Specify how to format the images in Capture, detect blank pages, and handle imported non-image files. This tab is available only when the **Profile Type** field is set to **1 - Capture Only** or **2 - Capture and Index** on the General Settings tab. For example, specify: ■ How captured images with this client profile are formatted, Section 4.7 ■ How blank pages are detected during capture (see Section 4.8) ■ Whether and how non-image documents are imported (Section 4.9)

Table 4–1   (Cont.) Client Profile Configuration by Train Stop

Train Stop	Main Configuration
Document Indexing Settings	Configure document separation, database lookup, dependent choice list, and document profile options as needed. This tab is available only when the **Profile Type** field is set to **2 - Capture and Index** or **3 - Index Only** on the **General Settings** tab. For example, specify: ■ How documents are created within batches (Section 4.10) and separated (Section 4.11) ■ How separator sheets are detected (Section 4.11) ■ If the profile uses a database lookup (see Section 4.12) or dependent choice list (see Section 4.13) ■ Which document profiles (sets of metadata fields) are available for users to select to complete metadata fields for documents (see Section 4.14)
Extension Profiles	Optionally identify client scripts to run for the selected profile in the client. ■ Use previously imported client JavaScripts to extend or customize client functionality (see Section 4.15) ■ Specify the order in which multiple extension profiles are executed when users perform actions using the client profile (see Section 4.15)
Security	Grant or remove access to the client profile for client users, based on their previously assigned Capture User role (see Section 4.16).
Post-Processing	Specify the next step for batches associated with this client profile after users release the batches in the client (see Section 4.17).
Summary	Review selected settings for the client profile.

4.2 Adding, Editing, or Copying a Client Profile

Follow these guidelines regarding editing client profiles:

■ It is recommended that you do not make major changes to a client profile after users have begun capturing batches using the profile. For example, if you add or remove some of a profile's metadata fields and users attempt to release batches they captured before the change, errors may occur, since the data in the batch no longer matches the client profile's settings. 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 additional batches from being captured.

■ While editing a client profile, it is useful to also run the client to view and test profile changes. After editing a client profile, its metadata fields, or its document profiles, sign out and back in to the client to see workspace changes reflected in the client.

To add, copy, or edit a client profile:

1. In a selected workspace, click the **Capture** tab.

2. In the Client Profiles table, click the **Add** button (plus sign) or select a profile and click the **Edit** button.

   You can also copy a client profile by selecting it, clicking the **Copy** button, and entering a new name when prompted. Copying a profile allows you to quickly duplicate and modify it.

The Client Profile screen displays, with settings grouped in train stops.

3. On each train stop, select applicable settings. (Each stop is summarized in Table 4–1.)

4. Click **Submit** to save and close the profile.

4.3 Deleting a Client Profile

Follow these steps to remove a client profile no longer in use. Deleting 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 profile and continue to view, edit, and release batches they created using the deleted profile.

> **Note:** Before deleting a profile, you may want to deactivate it for a period of time. See Section 4.4.

1. In the workspace, click the **Capture** tab.

2. In the Client Profiles table, select the profile to delete.

3. Click the **Delete selected Client profile(s)** button, then confirm the deletion.

4.4 Deactivating and Activating Client Profiles

Activating or deactivating a client profile enables you to make it accessible or hidden to client users with security access to it. By default, client profiles are active (online). Taking a client profile offline can be useful for troubleshooting purposes or to phase out a profile before deleting it.

- When a client profile is *online*, it is visible and available to Capture users who have client security access to it, as described in Section 4.16.1. In addition, batches captured with the client profile are also visible, subject to batch filtering settings described in Section 4.6.

- When a client profile is *offline*, it is temporarily hidden to all Capture users in the client. In addition, batches captured with the client profile that are not locked to users are also hidden, unless another profile uses the same batch prefix. For example, if profiles A and B use the same prefix and profile A is offline, selecting profile B still displays batches captured with profile A because they use the same prefix.

Follow these steps to change a client profile to online or offline:

1. On the **Capture** tab, select a profile in the Client Profiles table. Notice that the Status column displays Online or Offline for each profile.

2. Click the **Toggle Online/Offline** button to either activate the profile or deactivate it.

    Note that you can also deactivate or activate a client profile by selecting or deselecting the **Online** field on the **General Settings** train stop.

4.5 Configuring a Client Profile's Type For Capture, Index, or Both

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

1. When adding or editing a client profile (see Section 4.2), select the **General Settings** train stop.

2. In the **Profile Type** field, choose one of the following profile types:

   ■ Capture Only

   ■ Capture and Index

   ■ Index Only

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

4.5.1 Capture Only

Choose the **1 - Capture Only** profile type when you want users to scan or import documents but not index them. For example, this type is commonly used for batches to be later indexed 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* using a Capture Only profile, 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* using a Capture Only profile, 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.

> **Note:** With a Capture Only profile, indexing and document creation options do not apply. Settings on the **Document Indexing Settings** train stop are not available.

4.5.2 Capture and Index

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

■ When users *scan a batch* using a Capture and Index profile, the **Document Creation Option** selected on the **Document Indexing Settings** train stop determines how documents are created, as described in Section 4.10. 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 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.

4.5.3 Index Only

Choose the **3 - Index Only** profile type when you want users to index documents from previously captured batches. For example, a high-speed, production scanner is used by a single scanning operator to quickly create batches that are 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 indexers do not have scanner access

4.6 Filtering the Batch List Displayed to Users

Capture provides 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 workspace, 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 set in the client profile, as described in this section. 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.

Follow these steps to specify batches to display to users in the client window.

1. When adding or editing a client profile (see Section 4.2), select the **Batch Filter Settings** train stop.

2. In the train stop's settings, specify filter settings that restrict the list of batches that display. Follow these guidelines and filter descriptions listed in Table 4–2:

    - **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.

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

Table 4–2   Batch Filtering

Filter	Example Use
Additional Batch Prefixes	Users always see batches created with the selected profile's Batch Prefix, subject to other filters. ■ To see batches that match the profile's batch prefix, re-enter the batch prefix here. ■ 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. ■ Leave this field blank, and users see batches created by any profile in that workspace, regardless of prefix.
Processing States	Restrict display to batches with one or more selected processing states. Processing states are internal system states that cannot be redefined. ■ Use the **Ready** state to display batches 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. ■ Use the **Locked** state to display batches locked to any user. ■ Use the **Error** 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. ■ Use the **Processing** state to display batches currently undergoing processing by one of the Capture processors.
Batch Statuses	Restrict display to one or more batch statuses created on the **Classification** tab. For example, select a *Rescan* or *Needs Review* batch status to display batches needing attention to qualified users.
Priorities	Restrict display to one or more priorities. For example, select priority 10 to display batches needing immediate attention to users.

Table 4–2   (Cont.) Batch Filtering

Filter	Example Use
Batch Visibility	Restrict display by user and location.
	■ Select **User and Workstation** 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, whom you likely would not want opening other users' batches.
	■ Select **User** to display batches that the current user login captured on one or more workstations. For example, a common indexing scenario is for users on multiple workstations to use a common indexing login.
	■ Select **All Users** (default) to display batches to users, regardless of the workstation on which they were captured or by whom.
Days Old	Enter numbers in the **From** and **To** fields to display batches that are between the specified number of days old, for resolution by qualified users. For example, you might display batches that are between 7 and 45 days old.
Primary Sort, Secondary Sort	Specify how batches should be sorted, and select ascending or descending order. You can specify a primary and secondary sort by:
	■ Batch Name
	■ Batch Item Count
	■ Batch Date
	■ Batch Priority
	■ Batch Status
	For example, sort batches so that those with the highest priority display at the top and for those with the same priority, display those with the oldest date first.

4.7 Configuring Image Capture and Storage

When users capture documents in the client, the image settings that are applied come from two sources:

■ *Client profile settings*, which are described in this section. These settings apply to all batches captured with the client profile, and in some cases can be overridden by the user.

■ *Scanner settings*, which are specific to the selected scanner and selected by users. The user selects these settings after clicking the **Capture Settings** button in the batch pane. Once selected, these settings are saved with the client profile. For more information, see "How do I select scanner settings?" in *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*.

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

1. When adding or editing a client profile (see Section 4.2), select the **Image Settings** train stop.

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 users from changing the color setting in scanner settings in the client. Note that 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. Note that not all scanners may honor this setting.

c. In the **Blank Page Byte Threshold** field, optionally configure blank page detection, as described in Section 4.8.

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. Note that client users may be able to override these settings if allowed in their scanner-specific settings window.

3. Configure non-image settings, as described in Section 4.9.

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

4.8 Configuring Blank Page Detection

When users capture image documents, they may contain blank pages. To configure Capture to automatically delete blank pages from batches, identify how Capture detects a blank page by specifying a threshold file size, where any image whose size is less than or equal to this threshold is considered a blank page and therefore deleted.

Note that users can override this threshold setting in the client by clicking **Preferences** and entering a number in the **Minimum number of bytes scanned before deleting a page** field.

For information about the differences in configuring separator sheet and blank page detection, see Section 4.11.

1. When adding or editing a client profile (see Section 4.2), select the **Image Settings** train stop.

2. In the **Blank Page Byte Threshold** field, enter a file size value.

For black and white (200 x 200 DPI images), the recommended value is 1500. At this setting, 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.

4.9 Configuring Non-Image File Capture Settings

When users scan paper documents or import image files, Capture creates image documents. 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. When adding or editing a client profile (see Section 4.2), select the **Image Settings** train stop.

2. 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 train stop.

3. 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 documents stored in their native format. The default is 25 pages. Specify 0 to skip specifying a maximum number of pages to preview.

4. If needed, complete the **Non-Image Conversion** field settings.

   These settings are available when **Convert to Image Format** is selected in step 2, and allow you to specify the color, JPEG image quality and DPI resolution to use for images during file conversion.

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

4.10 Configuring Document Creation

When configuring a client profile, you must specify how the profile creates documents within batches. For example, is the profile used to capture documents 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 profile prompt the user to specify how to create documents based on the batch's contents?

To set a client profile's document creation option:

1. When adding or editing a client profile (see Section 4.2), select the **Document Indexing Settings** train stop.

   Note that document creation options do not apply to capture-only profiles. See Section 4.5.1.

2. In the **Document Creation Option** field, select an option. You can choose:

   - One Page (Simplex)

   - Two Page (Duplex)

   - Variable Number of Pages

   - Prompt User

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

4.10.1 One Page (Simplex)

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

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

4.10.2 Two Page (Duplex)

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

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

4.10.3 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 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 client discards the separator sheet pages, and places all the documents in a single batch. Note that you configure how Capture detects separator sheets in the **Separator Sheet Byte Threshold** field, as described in Section 4.11.

- 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.

4.10.4 Prompt User

This option prompts users with the window shown in Figure 4–2 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 choose a variable number of pages, as described in Section 4.10.3.

Figure 4–2 Window Prompting Client Users to Choose Document Creation Option
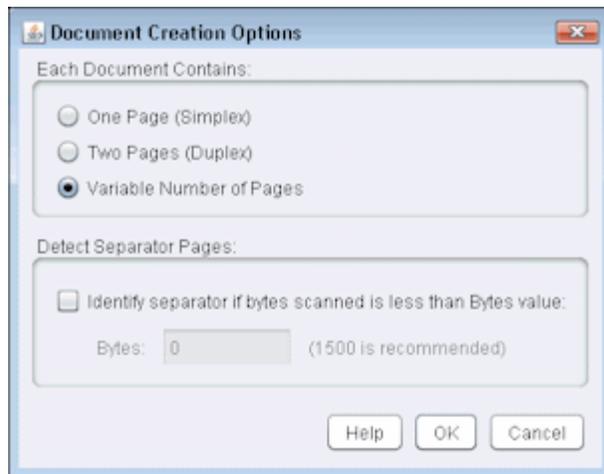
4.11 Configuring Separator Sheet Use

You can configure a client profile to use separator pages to determine document separation. When Capture encounters an image whose file size is less than or equal to the threshold value you specify, it creates a new document and deletes the separator sheet.

To configure a client profile to detect separator sheets:

1. When adding or editing a client profile (see Section 4.2), select the **Document Indexing Settings** train stop.

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

   In addition, if **Prompt User** is selected in the **Document Creation Option** field, client users can override the separator sheet threshold you specify in this separator sheet field, as described in "How do I scan using separator pages?" in *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*.

2. In the train stop's settings, specify a value in the **Separator Sheet Byte Threshold** field.

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

   The **Blank Page Byte Threshold** field also sets the threshold at which blank pages are detected. In that case, however, Capture deletes blank pages it detects, but does not treat them as separator sheets. Note that if both fields contain a value other than 0, only the **Separator Sheet Byte Threshold** field is used. The **Blank Page Byte Threshold** field is ignored. For information about deleting blank pages, see Section 4.8.

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

4.12 Using a Database Lookup in a Client Profile

Follow these steps to apply a database lookup to a client profile. You can apply one database lookup to a client profile.

1. On the **Metadata** tab, create a database lookup profile.

   The database lookup identifies the external database to connect to and the fields to search and return when users activate a database lookup. See Section 3.8.1.

2. On the **Capture** tab, add or edit a client profile (Section 4.2).

3. In the **Database Lookup Profile** field on the **Document Indexing Settings** train stop, select the database lookup you created in step 1.

4. In the **Records Returned Limit** field, define the maximum number of records to display in the results list.

5. Select the **Always Display Records** field to display a results list containing possible matching values whenever the user activates the database lookup.

   When deselected (the default), Capture displays a results list only when more than one matching database record is found.

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

7. In the client, test the metadata field's database lookup as a user. See *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*.

4.13 Using a Dependent Choice List in a Client Profile

In a dependent choice list, 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.

Follow these steps to apply a dependent choice list to a client profile. You can apply multiple choice lists to a client profile through metadata field definitions, but just one Dependent Choice List definition can be assigned.

1. On the **Metadata** tab, create two or more choice lists, then create a dependent choice list that links them. See Section 3.7.1.

2. On the **Capture** tab, add or edit a client profile (Section 4.2).

3. In the **Dependent Choice List** field on the **Document Indexing Settings** train stop, select the dependent choice list you created in step 1.

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

5. In the client, test the dependent choice list as a user.

4.14 Configuring Document Profiles in Client Profiles

A document profile specifies the set of metadata fields to use to index a specific type of document. When configuring a client profile, select document profiles for all types of documents to be indexed or both captured and indexed with the profile. See Section 3.10.1.

1. When adding or editing a client profile (see Section 4.2), select the **Document Indexing Settings** train stop.

   To access this train stop, you must select indexing options **2 - Capture and Index** or **3 - Index Only** in the **Profile Type** field on the **General Settings** train stop.

2. In the train stop's settings, complete the **Document Profiles** field.

- Select one or more document profiles listed.

- Select **All** to make all defined document profiles available for the user's selection.

- Select **Default** to make all metadata fields defined for the workspace available in a single profile; this option is useful for troubleshooting purposes.

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

4.15 Customizing Client Profiles Using JavaScript Extension Profiles

An extension profile contains information about a JavaScript extension configured for a client profile. Extensions allow you to customize client profile behavior.

To use one or more scripts in a client profile:

1. From a developer, obtain a client script file.

   For information on writing client scripts, see *Oracle Fusion Middleware Developing Scripts for Oracle WebCenter Enterprise Capture*.

2. On the workspace's **Advanced** tab, add a script, specifying **Capture Client** as its type, identifying the script file, and clicking **Submit**. For more information, see Section 3.11.

3. On the **Capture** tab, add or edit a client profile (Section 4.2).

4. On the **Extension Profiles** train stop, add the script.

   a. In the Extension Profiles table, click the **Add extension profile** button.

   b. In the **Description** field, enter a description for the client script.

   c. In the Extension Profile Settings window, select an extension type of **Capture Java Script Extension**.

   d. In the **Script** field, select the client script you imported on the **Advanced** tab and click **OK**.

5. In the Extension Profiles table, add additional scripts if needed and order them in the order in which they will execute.

6. Click **Submit** to save the client profile. Test the results of the added client script.

4.16 Managing Client Profile Security

As described in Section 1.7.2, Capture provides these layers of client security:

- To sign into the client itself, users must be assigned the appropriate user role (CaptureUser) by the system administrator. For more information regarding a Capture user's client access, contact your Capture system administrator.

  Note that workspace managers may be granted Capture workspace manager and user roles, allowing them access to the workspace for configuration and the client for testing configuration.

- To see and access specific client profiles, workspace managers assign users security access to the profiles, as described in this section.

This section covers the following topics:

- Section 4.16.1, "Granting Security Access to Client Profiles"

- Section 4.16.2, "Removing Client Profile Access"

Figure 4–3 Granting Security Access to the Selected Client Profile

4.16.1 Granting Security Access to Client Profiles

To grant Capture users security access to a client profile:

1. When adding or editing a client profile (see Section 4.2), select the **Security** train stop.

   The Client Profile Users table lists users with access to the client profile.

2. Click the **Add a new client profile user** button.

3. In the **Add Security Member** window, 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. Click **Add** to add a selected security member.

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

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

4.16.2 Removing Client Profile Access

When you remove access to a client profile from a user or group, the profile no longer displays in the client's **Client Profile** field for capturing new batches. However, users may still be able to access batches captured with the profile with another client profile selected.

To remove Capture users' security access to a client profile:

1. When adding or editing a client profile (see Section 4.2), select the **Security** train stop.

The Client Profile Users table lists users with access to the client profile.

2. Select a user or group in the table and click the **Delete selected client profile user(s)** button. Confirm the deletion.

4.17 Configuring a Client Profile's Post-Processing

After users complete work on a batch's documents (capturing, indexing, reviewing, and/or editing them), they release the batch, which uploads newly added batch items (images and non-image files) to the server and unlocks the batch. The batch's next step depends on its post-processing configuration, which can take one of several paths:

- **None**: No post-processing occurs. The batch may remain in the list, but is unlocked (no lock is displayed on the icon). This allows another user to lock the batch for use and make further changes. For example, you might select this configuration if your organization separates scanning and indexing roles in the client. Scanning users might release batches to an unlocked state, and indexing users might select them to work on.

- **Commit Processor:** The batch undergoes commit processing based on active commit profiles defined for the workspace. The batch remains in the batch list until the user refreshes the batch list, at which point:

  - The batch displays a processing icon if it is still committing.

  - The batch displays an error icon if an error was encountered during committing.

  - The batch is removed from the batch pane list if all documents were committed successfully.

- **Document Conversion Processor** or **Recognition Processor**: The batch is placed in a queue for further processing, such as a specified document conversion job (Section 6.7) or a recognition job (Section 7.2.5).

To configure post-processing for a client profile:

1. When adding or editing a client profile (see Section 4.2), select the **Post-Processing** train stop.

2. In the **Batch Processor** field, select the next step for batches after users release them.

3. In the **Batch Processor Job** field, select a recognition or document conversion job to run, if you selected Recognition Processor or Document Conversion Processor in the previous step.

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

5

Managing Import Processing

Capture's Import Processor provides automated bulk importing of documents (image and non-image) into a Capture workspace from email, network folders, or list files. This chapter describes how you configure and manage import jobs and their processing.

This chapter includes the following sections:

- Introduction to Import Processing
- Adding, Copying, or Editing an Import Processor Job
- Deleting an Import Processor Job
- Activating or Deactivating Import Jobs
- Configuring Email Message and Attachment Importing
- Configuring File Importing From a Folder
- Configuring List File Importing
- Configuring Metadata Assignment During Import
- Assigning Metadata Values from a Database Lookup During Import
- Configuring Post-Processing
- Customizing Import Processing Using Scripts

5.1 Introduction to Import Processing

This section covers the following topics:

- Section 5.1.1, "Key Import Processor Job Settings"
- Section 5.1.2, "Important Points About Import Processing"

5.1.1 Key Import Processor Job Settings

You can apply the Import Processor's automated import of images and other electronic documents into Capture to such applications as:

- Multi-function devices
- Images scanned using third-party software
- Documents sent as email attachments
- Images referenced in a list file that were scanned by a service bureau

Depending on the files to be imported, you create Import Processor jobs for the following import sources:

- **Email Source**: Import Processor imports files attached to incoming email messages into Capture. It can also import the email body and entire email message.

- **Folder Source**: 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, and optionally, metadata values to be assigned to the file or values to be matched against a database.

5.1.2 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, folder, or list file) on the **Import Source Settings** train stop. For example:

    - For a folder import job, you identify the folder and file types to import, as shown in Figure 5–1.

    - For a list file job, you identify the folder and list file to be read.

    - For an email source, you specify email accounts to monitor and email messages and/or attachments to import.

- The Import Processor supports processing of all import sources across multiple threads on a server as well as multiple servers in a cluster.

- You can customize the Import Processor's behavior by incorporating JavaScripts. See Section 5.11.

Figure 5–1   Selecting General Settings, including an Import Source, for an Import Processor Job

5.2 Adding, Copying, or Editing an Import Processor Job

Follow these guidelines regarding editing Import Processor jobs:

- It is recommended that you do not make major changes to an Import Processor job's workspace elements while it is online. For example, if you modify or remove metadata fields used by the job, errors will occur, since the data in the batch no longer matches the job's settings.

- While editing processor job settings, it is useful to also run the client to view imported batches. Note that you do not need to refresh the client after making changes to a processor job to see changes reflected in the client browser. However, you must refresh the batch list to see newly imported batches.

To add, copy, or edit an Import Processor job:

1. In a selected workspace, click the **Capture** tab.

2. In the Import Processor Jobs table, click the **Add** button or select a job and click the **Edit** button.

   You can also copy an Import Processor job by selecting a job, clicking the **Copy** button, and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

3. Select settings on the **General Settings** train stop.

   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** train stop.

    c. 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 train stop, such as specifying a default batch status or priority to assign to batches when they are created.

4. On the **Image Settings** train stop, complete settings relating to how imported image files are formatted and validated.

    a. 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**).

    b. 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. **Note:** This field does not apply to black and white images.

    c. In the **If Image Validation Fails** field, specify an action if an image page fails decompression validation: **Delete the batch** or **Skip the file**.

5. On the **Document Profile** train stop, complete settings related to assigning metadata to imported documents. See Section 5.8.

6. On the **Import Source Settings** train stop, configure source-specific settings.

    ■ For an email source job, see Section 5.5.

    ■ For a folder source job, see Section 5.6.

    ■ For a list file source job, see Section 5.7.

7. On the **Database Lookup** train stop, optionally configure a database lookup to assign metadata values from a database during import. See Section 5.9.

8. On the **Post-Processing** train stop, specify what happens after import processing completes, depending on whether system errors were encountered.

See Section 5.10.

9. Review settings on the **Import Job Summary** train stop and click **Submit**.

10. Test the Import Processor job you created.

Set the frequency to every 30 seconds and monitor the folder, list file, or email account to view processing activity.

5.3 Deleting an Import Processor Job

When you delete an import job, the Import Processor no longer monitors for files to import at the job's specified frequency.

To delete an import job:

1. In a selected workspace, select the **Capture** tab.

2. In the Import Processor Jobs table, select a job to delete and click the **Delete** button.

(To deactivate rather than delete a job, select it and click the **Toggle Online/Offline** button.)

3. When prompted, click **Yes** to confirm the deletion.

5.4 Activating or Deactivating Import Jobs

If online, import jobs run at the interval specified in the **Import Frequency** field on the job's **General Settings** train stop. You can temporarily stop the job from running (take it offline) or change a deactivated job to run again.

Follow these steps to change an Import Processor job to online or offline:

1. On the **Capture** tab, select a job in the Import Processor Jobs table. Notice that the Status column displays Online or Offline for each job.

2. Click the **Toggle Online/Offline** button to either activate the job or deactivate it.

   Note that you can also deactivate or activate an Import Processor job by selecting or deselecting the **Online** field on the **General Settings** train stop.

5.5 Configuring Email Message and Attachment Importing

With an email import job, the Import Processor imports files attached to incoming email messages into Capture along with email message elements, such as subject and body text. 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.

To configure email Import Processor job settings:

1. Follow the steps in Section 5.2 to add, edit, or copy an Import Processor job, selecting **Email Source** in the **Import Source** field on the **General Settings** train stop.

2. Select the **Import Source Settings** train stop to configure email import configuration on each tab.

Figure 5–2   Choosing Email Source Settings on the Import Source Settings Train Stop

3. On the **Email Accounts** tab, configure the email server the Import Processor job will connect to by defining its DNS name or IP address, port, and security. If using SSL (Secure Sockets Layer) or TLS (Transport Layer Security), the certificate for the email server must be in the application server (WebLogic) keystore. For more information, see *Oracle Fusion Middleware Securing Oracle WebLogic Server*.

   Then configure the specific email accounts that the job will check for messages. In the Email Accounts to Process table, click the **Add** button. In the Add/Edit Email Account window, enter an email address and password to provide the job access to the email account. Click **Verify** to confirm that Capture can connect to the email server using the specified account information. Include additional email accounts if needed.

4. 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's 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. In the Message Filters table, select the **Enabled** field for each email element to search, then enter characters to find in the **Field Contains** field.

      For example, to search for emails whose subject or message body contains the word *payment*, you would select **Enabled** for both search fields, include payment in each **Field Contains** entry, and select the **Or** search operator.

   c. In the **Search Operator** field, select the search operator to use for the specified message filters: **And** (default) imports only if all search criteria match, while **Or** imports if any search criteria matches.

5. On the **Processing** tab, specify how to process the email messages and their attachments. For example, specify information to include, and priority to assign to batches, based on email priority.

   a. Under **Email Message Options**, specify whether to import the message body file, and if yes, select an import format (text or EML) and whether to include it when no attachments are present. Lastly, specify whether to import the entire email message (including attachments) as an EML file.

   b. Specify attachment files to include or exclude based on their file masks. For example, you might include all PDF files (*.pdf) or exclude all GIF files (*.gif).

   c. Under **Document Ordering**, specify the order in which the elements (for example, message body and attachments) from an email message are ordered as documents in imported batches.

   d. Under **Include in Batch Note**, select message elements to include in a note attached to each imported batch. See "Adding, editing, and deleting batch notes" in *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture*.

   e. Under **Batch Priority**, optionally assign a priority (low, normal, or high) to each new batch based on its email priority. For example, enter 8 in the **High** field to assign high priority emails a batch priority of 8 in Capture. Note that emails not assigned a priority are considered normal priority.

6. 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, you might prevent successfully imported emails from being imported again if the job is run regularly by moving them to a specified folder, but retain messages that failed import.

7. Complete other Import Processor job train stops as described in Section 5.2.

8. Test the email import job.

   When the job is activated at the specified frequency, the Import Processor checks the specified email accounts for messages and searches folders for matching emails. If found, the Import Processor creates a Capture batch and creates a document for each document being imported from the email message, optionally populates metadata fields with email metadata, and deletes successfully imported messages or moves them to a folder.

5.6 Configuring 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.

To configure folder Import Processor job settings:

1. Follow the steps in Section 5.2 to add, edit, or copy an Import Processor job, selecting **Folder Source** in the **Import Source** field on the **General Settings** train stop.

2. Complete settings on the **Import Source Settings** train stop.

   a. In the **Import Folder Path** field, specify the folder for the Import Processor to monitor. Use a fully qualified folder path relative to the Capture server operating system.

      On Linux, you might enter: `/net/abc-01/import/expenses`

On Windows, you might enter: `\\abc-01\import\expenses`

b. 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 masks with a semi-colon (;) character.

c. If you want Import Processor to monitor and import files from subfolders within this folder, select the **Process subfolders** field. Import Processor creates a new batch for each subfolder processed.

Figure 5–3   Choosing Folder Settings on the Import Source Settings Train Stop

d. In the **Create a New Batch** field, specify whether to create a new batch with each file imported or with each folder imported.

e. In the **Ready File** field, optionally enter a file name that must exist in the folder (and each subfolder, if applicable) before processing the folder. This option delays the processing of a folder until the ready file appears. When processing is completed, the ready file is deleted.

f. In the **File Processing Order** fields, specify the order in which files in the import folder are processed, by specifying their primary and secondary sort type and order. You can specify import order based on sort types of **None** (no sort order), **File Name**, **File Extension**, or **File Modified Date**, and specify a sort order of **Ascending** or **Descending**.

g. 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 example, you can delete files, change their extension, and 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 train stops as described in Section 5.2.

4. Test the folder import job.

When the job is activated at the specified 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 specified.

5.7 Configuring List File Importing

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

A list file job can also search a database for matching list file values in order to populate metadata fields. See Section 5.9.

To configure list file Import Processor job settings:

1. Generate a list file.

   A list file is an ASCII 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.

2. Follow the steps in Section 5.2 to add, edit, or copy an Import Processor job, selecting **List File Source** in the **Import Source** field on the **General Settings** train stop.

3. On the **General Settings** train stop, 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. Complete settings on the **Import Source Settings** train stop.

   a. In the **Import Folder Path** field, specify the folder for the Import Processor to monitor. Use a fully qualified folder path relative to the Capture server operating system.

   On Linux, you might enter: `/net/abc-01/import/expenses`

   On Windows, you might enter: `\\abc-01\import\expenses`

   b. In the **File Mask(s)** field, specify the list files to import by entering a file mask that will match the list files to process. Separate masks with a semi-colon (;) character.

   To monitor and import list files from subfolders within the specified folder, select the **Process subfolders** field. Import Processor always creates a new batch for each subfolder processed.

   c. From the **Create a New Batch** options, specify whether to create a new batch for each list file or folder imported.

    d. 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).

    e. In the **Maximum Fields Per Document** field, specify a maximum number of fields in the list file to map to metadata fields.

    f. 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.

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    g. 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. For example, you can delete them, change their extension, or add a prefix to them.

    h. In the **Document File Post-Processing** fields, specify if you want to delete document files from their specified location after successful import.

Figure 5–4   Choosing List File Settings on the Import Source Settings Train Stop

5. On the **Document Profile** train stop, 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 Section 5.8.

   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 the **Edit** button, and select **Field 1** in the **Metadata Attributes** field of the Metadata Field Mappings window.

Figure 5–5   Mapping Metadata Fields to List File Fields
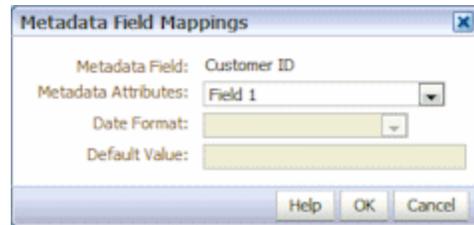
6. Complete other Import Processor job train stops as described in Section 5.2.

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 identified in the list file, optionally populates metadata fields with list file data and optionally deletes or renames the list file.

5.8 Configuring Metadata Assignment During Import

Use the **Document Profile** train stop to configure how import job values are mapped to Capture metadata fields during import processing.

1. In an Import Processor job, select the **Document Profile** train stop, as shown in Figure 5–6.

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.

Figure 5–6   Configuring Metadata Assignment for an Import Processor Job

3. In the Metadata Field Mappings table, map Capture metadata fields to metadata values specific to the selected import source.

   In the **Metadata Field** column, select a Capture field to populate, and click the **Edit** button. Note that all Capture metadata fields defined for the workspace are available for mapping. A Capture metadata field does not need to be included in the selected default document profile to be populated.

4. Complete settings in the Metadata Field Mappings window.

   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. If needed, select a date format in the **Date Format** field. (The **Date Format** field is available only for the List File source and only when mapped to a list file position, Field 1 - Field n. If a date format is not specified, the default date format specified on the **General Settings** tab is used.)

   b. In a *list file import job*, select from list file, document, or field-related attributes, listed in Table 5–1. To map values contained in the list file, identify their field position using the field attributes (Field 1, Field 2, and so on.) The number of field attributes displayed depends on the number specified in the **Maximum Fields Per Document** field on the list file's **Import Source Settings** train stop.

Table 5–1   System Metadata Attributes for List File Import Jobs

System Attribute	Value for example list file being imported (/import/expenses/20120426/Customer1.LST)
List File Name	Customer1.lst
List File Base File Name	Customer1
List File Extension	LST
List File Folder Path	/import/expenses/20120426
List File Folder Name	20120426
List File Full File Path	/import/expenses/20120426/Customer1.LST
Document File Name	Customer1.pdf
Document Base File Name	Customer1
Document File Extension	pdf
Document Folder Path	/import/expenses/20120426
Document Folder Name	20120426
Document Full File Path	/import/expenses/20120426/Customer1.pdf
Document File Modified Date/Time	*File modified date/time - system value*

    c. In a *folder import job*, select from folder, file, or path-related attributes, listed in Table 5–2.

Table 5–2   System Metadata Attributes for Folder Import Jobs

System Attribute	Value for example path for file being imported (/import/expenses/20120426/Customer1.pdf)
File Name	Customer1.pdf
Base File name	Customer1
File Extension	Pdf
Folder Path	/import/expenses/20120426
Folder Name	20120426
Full File Path	/import/expenses/20120426/Customer1.pdf
File Modified Date/Time	File modified date/time - system value

    d. In an *email import job*, select from email message-related attributes, listed in Table 5–3.

Table 5–3   System Metadata Attributes for Email Import Jobs

System Attribute	Description
From Name	Name alias of From address
From Address	Sender's email address
Reply To Name	Reply To Name for the message
Reply To Address	Reply To Address for the message
Recipient Names	Collection of recipient names for the message
Recipient Addresses	Collection of recipient address for the message

Table 5–3   (Cont.) System Metadata Attributes for Email Import Jobs

System Attribute	Description
Folder	Folder name from which the message was obtained
Received Date	Date and time message was received
Sent Date	Date and time message was originally sent
Subject	Subject of the message
Email Importance	Low, normal and high priority value of the message
MessageId	Unique ID of the message

e. In any import job, select from common system attributes, listed in Table 5–4.

Table 5–4   Common System Metadata Attributes for Import Jobs

System Attribute	Description
Import Date/Time	Date and time at which batch was imported
Import Job Name	Name assigned to the Import Processor job
Default Value	Default value assigned as specified
Capture Server's Host Name	Host name assigned to the Capture server

5. Click **OK**. Map other metadata fields in the Metadata Field Mappings table as needed.

5.9 Assigning Metadata Values from a Database Lookup During Import

Follow these steps to use a database lookup profile in an import job. Using a database lookup allows the Import Processor, in addition to importing from an email, folder, or list file source, to also search a specified database for a record that matches an identifying value and if found, populate other metadata fields from the database.

To perform a database search during an import job, the Import Processor needs a value to search for in a specified database record. For example:

- A list file import job might search for a list file value, such as a Customer ID field.

- An email import job might search for an email message value, such as the subject or from address value.

- A folder import job might search for a file name, such as files named with an employee ID value.

To configure a database lookup for an Import Processor job:

1. On the **Metadata** tab, create the database lookup profile, as described in Section 3.8.

2. On the **Capture** tab, add or edit an Import Processor job, as described in Section 5.2.

3. On the import job's **Document Profile** train stop, configure mapping for the search field you defined in the database lookup. See Section 5.8.

For example, for a list file import job, you would map the database lookup's search field by selecting the metadata field in the Metadata Field Mappings table,

clicking the **Edit** button, and selecting the field position of the list file value to search.

4. On the import job's **Database Lookup** train stop, configure the lookup.

   a. In the **Database Lookup Profile** field, select the profile you created in step 1.

   b. In the **Database Search Field** field, select the Capture field on which to search.

   c. In the **When more than one record is found** field, select whether to use the first record found or skip selecting a record.

5. Run the Import Processor job and test the database lookup.

   When the job is online and run at its frequency, the Import Processor imports as specified, reads or acquires the specified value, searches the database field for a matching value and if found, populates other metadata fields from the database table.

5.10 Configuring Post-Processing

You use post-processing settings to specify what happens after import processing completes a batch. To configure post-processing for an Import Processor job:

1. When adding or editing a job (see Section 5.2), select the **Post-Processing** train stop.

2. In the **Batch Processor** field, select the next step for batches after they 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 or document conversion job to run, if you selected Recognition Processor or Document Conversion Processor in the previous step.

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

5.11 Customizing Import Processing Using Scripts

To customize Import Processor behavior, incorporate JavaScripts. For example, you might use scripts to skip the importing of certain files or batches or to add document-level metadata values during importing.

To use a script in an Import Processor job:

1. From a developer, obtain an Import Processor JavaScript file.

   Information on writing Import Processor scripts is provided in *Oracle Fusion Middleware Developing Scripts for Oracle WebCenter Enterprise Capture*.

2. On the workspace's **Advanced** tab, import the script, specifying **Import Processor** as its script type, and identifying the script file. For more information, see Section 3.11.

3. On the **Capture** tab, select the Import Processor job and click the **Edit** button.

4. In the **Script** field on the **General Settings** train stop, select the Import Processor script you imported.

5. Test the results of the added import script.

   In the **Import Frequency** field, specify a short time interval, then click **Submit** to save the job. Monitor the specified import source and test the import results.

6

Managing Document Conversion Processing

Capture's Document Conversion Processor provides two key functions: using Oracle Outside In Technology, it automatically converts non-image documents to image format, and optionally merges documents. This chapter describes how workspace managers manage document conversion, by configuring document conversion jobs and monitoring their processing.

This chapter includes the following sections:

- Introduction to Document Conversion
- Adding, Copying, or Editing a Document Conversion Job
- Deleting a Document Conversion Job
- Activating or Deactivating Document Conversion Jobs
- Specifying How Documents are Merged and Metadata is Assigned
- Configuring Post-Processing and Monitoring
- Configuring Batch Flow to a Document Conversion Processor Job
- Handling Document Conversion Processing System Errors

6.1 Introduction to Document Conversion

This section covers the following topics:

- Section 6.1.1, "Key Document Conversion Processor Job Settings"
- Section 6.1.2, "Important Points about Document Conversion"
- Section 6.1.3, "Document Conversion Processor Use With Other Batch Processors"

6.1.1 Key Document Conversion Processor Job Settings

The Document Conversion Processor provides automated conversion of non-image electronic documents such as Microsoft Word, Excel, or PDF documents to image format. Create Document Conversion Processor jobs that specify the following:

- Which files to convert, specified by file name (for example, PDF files).
- The format to convert non-image files into: black and white TIFF or color JPEG.
- If and how non-image documents should be merged during document conversion and how metadata values should be applied when merging documents.
- The next post-processing step (if any) after document conversion. For example, converted batches might go to a Recognition Processor job or the Commit

Processor might output them. If no post-processing step is specified, processed batches become available for indexing users to complete.

Figure 6–1   Specifying Documents to Convert on the Document Selection Train Stop

6.1.2 Important Points about Document Conversion

- Batches undergoing document conversion may contain a mixture of image and non-image document files. If the processor encounters documents that are already in image format, it skips them but still merges documents as configured.

- In Capture, document conversion is an intermediate batch flow step. This means you must configure how batches reach document conversion (Section 6.7) and the next post-processing step (if any) that occurs after document conversion (Section 6.6).

- You can monitor document conversion processing through post-processing options. For example, you can configure separate email notification for batches that process successfully and for those that encounter system errors, and can rename batches and change their status or priority. For post-processing information, see Section 6.6. For information about system errors, see Section 6.8.

6.1.3 Document Conversion Processor Use With Other Batch Processors

The Document Conversion Processor is often used with other processor jobs, as described in the following scenarios:

- Use Case 1: Processing Expense Reports

- Use Case 2: Processing Invoices

6.1.3.1 Use Case 1: Processing Expense Reports

1. Using a multi-function device (MFD), an end-user scans an expense report, which emails it.

    a. The end-user scans the expense report along with receipts into a single PDF file that contains the cover sheet with one or more bar codes.

    b. After scanning, the MFD emails the document to a designated email account for expenses processing.

2. The Import Processor imports and processes the email, creates a batch, and forwards it for document conversion.

    a. The Import Processor processes the email message, and creates a batch containing two documents:

    1) Report PDF (cover sheet/report)

    2) Email message, positioned as the last document in the batch

    b. After processing the email message, the Import Processor forwards the newly created batch to the Document Conversion Processor queue.

3. The Document Conversion Processor converts the documents in the batch to image format, merges the documents (expense report and email message) into a single document, and forwards the batch for recognition processing.

    a. The Document Conversion Processor converts the PDF and email message to image format.

    b. The Document Conversion Processor merges the two documents into a single document. In case the email had important information, it is included as the last page of the expense document.

    c. The Document Conversion Processor forwards the batch to the Recognition Processor queue so that the expense report number can be automatically recognized from the cover sheet.

4. The Recognition Processor performs bar code recognition and indexing of the document, and then forwards the batch to the Commit Processor for committing.

5. The Commit Processor commits the documents in the batch.

6.1.3.2 Use Case 2: Processing Invoices

1. A vendor sends an email to a designated email account with two invoices in PDF format attached along with explanatory text in the email message's body text.

2. The Import Processor imports and processes the email message, creating a batch containing three documents.

    The import job is configured to place the email message body as the last document in the batch and to forward the batch for document conversion.

3. The Document Conversion Processor converts, merges, and forwards the batch for committing.

    a. The document conversion job converts the PDFs and the email message documents to image format.

    b. The document conversion job is configured to merge the last document (email message body) in the batch to each previous document. As a result, the email message body is appended to both invoices.

    c. The email message document (third document) is removed from the batch.

4. The Commit Processor commits each invoice along with the original email message so that another process such as Oracle WebCenter Forms Recognition can perform automated data extraction.

6.2 Adding, Copying, or Editing a Document Conversion Job

To add, copy, or edit a document conversion job:

1. In a selected workspace, select the **Processing** tab.

2. In the Document Conversion Jobs table, click the **Add** button or select a job and click the **Edit** button.

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

3. Complete settings on the **Document Selection** train stop.

   a. Enter a name for the job in the **Name** field.

   b. In the **Documents to Convert** field, select whether to process all non-image documents or only ones with a specified file name filter. For example, to process PDF documents only, choose **Selected non-image documents**, then enter *.pdf in the **File Name Filter** field. You can enter an asterisk (*) as a wildcard character, and separate multiple filters with a comma or semi-colon.

4. Complete settings on the **Output Format** train stop.

   You can convert non-image documents to either black and white TIFF (default) or color JPEG. If you select JPEG, specify an image quality from 0 (lowest quality) to 100 (highest quality) to use for compression in the **JPEG Image Quality** field; the default value is 85. Select a resolution in the **DPI** field; the default is 200.

5. Complete settings on the **Document Merge Options** train stop.

   See Section 6.5.

6. On the **Post-Processing** train stop, specify what happens after document conversion processing completes, depending on its success.

   See Section 6.6.

7. Review settings on the **Summary** train stop and click **Submit** to save the job.

8. Configure how batches flow to the Document Conversion Processor job. See Section 6.7.

9. Test the document conversion job you created.

6.3 Deleting a Document Conversion Job

Deleting a document conversion job makes it unavailable for batches for which it is set as a post-processing step. If a job specified for post-processing is unavailable, 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.

To delete a document conversion job:

1. In a selected workspace, select the **Processing** tab.

2. Select a job to delete in the Document Conversion Jobs table, and click the **Delete** button.

   To deactivate a job instead, select it and click the **Toggle Online/Offline** button.

3. When prompted, click **Yes** to confirm the deletion.

6.4 Activating or Deactivating Document Conversion Jobs

If online, document conversion jobs run when selected in a client profile or processor job's **Post-Processing** train stop. You can temporarily stop the job from running (take it offline) or change a deactivated job to run again.

> **Note:** When reactivating a job, it may take up to a minute for the job to resume processing batches that were queued while the job was offline.

Follow these steps to change a document conversion job to online or offline:

1. On the **Processing** tab, select a job in the Document Conversion Jobs table. Notice that the Status column displays Online or Offline for each job.

2. Click the **Toggle Online/Offline** button to either activate the job or deactivate it.

   Note that you can also deactivate or activate a document conversion job by selecting or deselecting the **Online** field on the **Document Selection** train stop.

6.5 Specifying How Documents are Merged and Metadata is Assigned

The Document Conversion Processor lets you specify if and how to merge documents in a batch during conversion processing and how to assign metadata values when merging documents.

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 document 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).

1. Add or edit a document conversion job as described in Section 6.2, and select the **Document Merge Options** train stop. Use this tab to specify:

   - If and how to merge documents in the batch.

   - If merging one document with all other documents, where to place that document.

   - Which document's metadata values to assign and retain when merging.

2. Select a batch merge option. You can choose:

   - **Do not merge documents:** Select this option (default) if batches to convert are already organized into documents or 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. When selected, 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. Note that 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. Note that the last 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.

3. In the **Source Document Page Placement** field, specify whether to add the source document to the start or end of the target document.

   This field applies only when the **Merge first document with all other documents** or **Merge last document with all other documents** option is selected in the **Batch Merge Options** field.

4. Specify how to apply metadata values 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 to allow the target document's metadata values to be overwritten by the source document's metadata values.

   Note that these fields can be selected together. 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.

6.6 Configuring Post-Processing and Monitoring

Use a document conversion job's post-processing options to specify what happens after processing completes, depending on processing success.

To configure post-processing settings:

1. In a selected workspace, add or edit a Document Conversion Processor job. See Section 6.2.

2. Click the **Post-Processing** train stop.

   The screen lists the same 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 document conversion processing completes. You can choose a batch processor of **None** (no processing occurs), **Commit Processor, Recognition Processor**, or **Document Conversion Processor**. If you choose Recognition Processor or Document Conversion Processor, specify a 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 to send an email after processing completes successfully or fails. While configuring and testing a Document Conversion Processor job, you might set yourself to receive email notifications upon system errors, then later automatically alert an administrator of processing errors.

5. In the remaining fields, specify how to change processed batches.

    a. Rename batches by adding a prefix. For example, rename batches that were unsuccessful with the prefix ERR for follow-up.

    b. 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.

6.7 Configuring Batch Flow to a Document Conversion Processor Job

To run a document conversion job, you must configure batches to flow to the job for processing. You do this by setting the Document Conversion Processor job as a post-processing step in a client profile or other processor job. To configure batch flow from:

- A Client Profile, see Section 4.17.

- An Import Processor job, see Section 5.10.

- A Recognition Processor job, see Section 7.2.4.

For example, you might create an Import Processor job that imports email messages and their PDF attachments, then sends them to the Document Conversion Processor for conversion to image format, then sends them to a Recognition Processor job for bar code recognition.

6.8 Handling Document Conversion Processing System Errors

A Document Conversion Processor job might encounter system errors such as the following during processing:

- Errors converting non-images.

- Errors related to accessing the database, such as a network failure.

In addition to email notification, the Capture system administrator can consult the Document Conversion Processor performance metrics and logs to address system issues.

7

Managing Recognition Processing

Capture's Recognition Processor provides automated bar code recognition, document separation, and indexing for image documents in a Capture workspace. Refer to the Capture Certification Matrix for a list of platforms that support the Recognition Processor. This chapter describes how you configure and manage recognition jobs and their processing.

This chapter includes the following sections:

- Introduction to Recognition Processing
- Configuring General Recognition Processor Job Settings
- Configuring Jobs Based on Their Document Organization
- Configuring Bar Code, Patch Code, and Separator Page Definitions
- Specifying a Static or Dynamically Determined Document Profile
- Specifying Metadata Field Auto Population
- Configuring Database Lookups in Recognition Processing Jobs
- Customizing Recognition Processing Using Scripts
- Handling Recognition Processing System Errors

7.1 Introduction to Recognition Processing

The Recognition Processor is designed to accommodate a wide variety of document scenarios and configurations. A common recognition processing scenario works as follows:

1. A recognition job runs as a post-processing step after Capture 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 database lookup values to document metadata fields.

This section describes the main concepts underlying the Recognition Processor. It includes the following topics:

- Section 7.1.1, "About Document Organization Methods"
- Section 7.1.2, "Other Key Recognition Processor Job Settings"

7.1.1 About Document Organization Methods

To perform document organization, the Recognition Processor expects 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 based on 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.

While the Recognition Processor expects batches to contain a single, image formatted document, you also have the option of configuring the recognition job to skip document organization. For example, you might skip document organization with a job that processes batches containing already separated documents that need bar code recognition only.

You specify a document organization method on the recognition job's **Document Organization** train stop, as shown in Figure 7–1. You can select one of the following methods:

- Fixed number of pages per document (Section 7.3.1)

- Same bar code value on each page (Section 7.3.2)

- Separator pages (Section 7.3.3)

- Hierarchical separator pages (Section 7.3.4)

- None: Do not perform document organization (Section 7.3.5)

Figure 7–1   Choosing How Documents are Organized When Creating a Recognition Job

7.1.2 Other Key Recognition Processor Job Settings

Section 7.1.1 describes the integral role that the document organization method plays in a recognition job. This section describes other key interrelated recognition job settings that enable the Recognition Processor to perform automated bar code recognition, document separation, and indexing. These settings include:

- How are bar codes and patch codes detected and identified?

- How are documents separated?

- How are documents classified?

- How are metadata values assigned?

- What happens after recognition processing?

Note that in addition to recognition job settings, you can use JavaScripts to customize Recognition Processor functions. For example, if a bar code contains three values that are concatenated, you could use a script to parse the values and correctly assign them to metadata fields. See Section 7.8.

7.1.2.1 How are bar codes and patch codes detected and identified?

When creating a recognition job, you specify how Recognition Processor detects and identifies bar codes:

- On the **Bar Code Recognition** train stop, you specify which bar codes to detect, such as all auto-detectable 1-D symbologies. During processing, the Recognition Processor searches through all pages, recognizing bar codes set for detection in the job. The following options are available on this train stop:

Table 7–1   Bar Code Recognition Options

Option	Description
Enable Auto-Detect	If you do not know which bar code symbologies are used, select this field, and Recognition Processor will check for the most common bar codes.
Auto-Detectable 1-D Symbologies	Select from a list of auto-detectable 1-D bar code symbologies that you want Recognition Processor to search for.
	1-D symbologies that you can choose include:
	■ Codabar
	■ Code 128
	■ Code 39
	■ Code 93
	■ EAN-13
	■ EAN-8
	■ Interleaved 2/5
	■ UCC/EAN 128
	■ UPC-A
	■ UPC-E

Table 7–1   (Cont.) Bar Code Recognition Options

Option	Description
Other 1-D Symbologies	Select from a list of non auto-detectable 1-D bar code symbologies that you want Recognition Processor to search for. 1-D symbologies that you can choose include: ■ Airline (IATA) 2/25 ■ Code 32 ■ Datalogic 2/5 ■ Industrial 2/5 ■ ISBN Addon 2 ■ ISBN Addon 5 ■ Matrix 2/5 ■ Postnet/Planet ■ Patch Code
2-D Symbologies	Select the 2-D bar code symbologies you want Recognition Processor to search for. 2-D symbologies you can choose include: ■ Data Matrix ■ PDF417 ■ QR code
Validate optional checksum	Checksum validation is optional in certain symbologies. It is recommended that you select this option if your bar code contains a check sum value. For example, if a Code 39 bar code does not contain a checksum, this setting prevents the bar code from being recognized. Also, if this option is not selected and a Code 39 bar code with a checksum is recognized, the checksum character will be included in the bar code data.

> **Note:**   It is recommended to select the bar code symbology if it is known, because it improves performance and decreases the risk of detecting unknown bar codes that may interfere with processing.

■ On the **Bar Code Definition** train stop, you specify one or more **bar code definitions**, which identify a bar code by its characteristics, such as its length in characters. The following validation rules are available when creating a bar code definition:

- Length

- Mask

- Regular Expression

- Choice List (where a bar code on the page must match a value contained in the selected choice list)

- None (where a script can provide validation)

As the Recognition Processor recognizes bar codes, they are assigned to a bar code definition when the validation condition is met. In the job, you use these bar code definitions in a variety of ways, such as for metadata assignment and page separation. For information on managing bar code definitions, see Section 7.4.1.

7.1.2.2 How are documents separated?

Capture provides a range of options for defining document separation, including bar code and/or patch code separators.

The document organization method you choose, described in Section 7.1.1, is related to how documents are separated. As a result, the document separation options you specify on the **Document Processing** tab depend on your selected document organization.

- If you specify that *documents contain a fixed number of pages*, you 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.

7.1.2.3 How are documents classified?

As part of processing, the Recognition Processor determines the document profile to use, which identifies the metadata fields available to index a document. On the **Document Profile** train stop, you specify how a document profile is assigned to documents as they are processed by the recognition job. See Section 7.5. 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.

7.1.2.4 How are metadata values assigned?

You can configure a recognition job to assign metadata values in the following ways:

- On the **Fields** train stop, configure metadata fields from the workspace to auto populate with any of the following values: bar code value, batch name, default value, scan date, or index date.

- On the **Database Lookup** train stop, configure a database search for either a metadata field value or a bar code value. The return fields defined for the Database Lookup will be applied to the document.

7.1.2.5 What happens after recognition processing?

Use settings on the **Post-Processing** train stop to specify what happens after recognition processing completes, depending on processing success:

- *If no system errors occur*, specify the next batch processor and if applicable, the specific job to 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 be used to 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, the specific job to run. You can also specify **None** for no post-processing action. For example, you might set **None** if you want batches released after recognition processing so that client indexing users can complete them. 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.

7.2 Configuring General Recognition Processor Job Settings

This section covers common tasks you perform in working with Recognition Processor jobs. (See Section 7.3 for information on configuring specific types of recognition jobs.) This section includes the following topics:

- Section 7.2.1, "Adding, Copying, or Editing a Recognition Job"
- Section 7.2.2, "Deleting a Recognition Job"
- Section 7.2.3, "Activating or Deactivating Recognition Jobs"
- Section 7.2.4, "Configuring Post-Processing and Monitoring"
- Section 7.2.5, "Configuring Batch Flow to a Recognition Processor Job"

7.2.1 Adding, Copying, or Editing a Recognition Job

To add, copy, or edit a recognition job:

1. In a selected workspace, click the **Processing** tab.

2. In the Recognition Processor Jobs table, click the **Add** button or select a job and click the **Edit** button.

   You can also copy a Recognition Processor job by selecting one, clicking the **Copy** button, and entering a new name when prompted. Copying a job allows you to quickly duplicate and modify it.

3. Complete settings on the **General Settings** train stop.

   a. Enter a name for the job in the **Recognition Job Name** field.

   b. The **Online** field is automatically selected. For more information about activating or deactivating jobs, see Section 7.2.3.

   c. If the recognition job uses a script, select it in the **Script** field. For information about using scripts, see Section 7.8.

4. On the **Bar Code Recognition** train stop, identify bar code types (symbologies) for the recognition job to detect.

   It is recommended to select the bar code symbology if it is known, because it improves performance and decreases the risk of detecting unknown bar codes that may interfere with processing.

5. On the **Bar Code Definition** train stop, add bar code definitions.

For background information, see Section 7.1.2.1. For steps, see Section 7.4.1.

6. On the **Document Organization** train stop, specify how documents in batches are composed.

    See Section 7.1.1.

7. On the **Document Profile** train stop, specify a document profile to use, or configure one to be dynamically determined. The settings that display depend on the selected document organization method. You must select a default document profile.

    For background information, see Section 7.1.2.3. For steps, see Section 7.5.

8. On the **Document Processing** train stop, specify how documents are separated and processed. The settings that display depend on the selected document organization method. If documents are separated by single or hierarchical separators, configure bar code or patch code separator rules.

    For background information, see Section 7.1.2.2. For steps, see Section 7.4.2.

9. On the **Fields** train stop, set bar codes or other values to auto populate Capture metadata fields for each document.

    See Section 7.6.

10. On the **Database Lookup** train stop, optionally configure a database lookup for the recognition job.

    See Section 7.7.1.

11. On the **Post-Processing** train stop, specify what happens after recognition processing completes, depending on processing success.

    See Section 7.2.4.

12. Review settings on the **Summary** train stop and click **Submit**.

13. Configure how batches flow to the Recognition Processor job. See Section 7.2.5.

14. Test the Recognition Processor job.

7.2.2 Deleting a Recognition Job

Deleting a recognition job makes it unavailable for batches for whom it is set as a post-processing step. Note that before deleting a recognition job, you may want to take it offline for a time first to resolve unexpected issues with it, as described in Section 7.2.3.

To delete a recognition job:

1. In a selected workspace, select the **Processing** tab.

2. In the Recognition Processor Jobs table, select a job to delete and click the **Delete** button.

3. When prompted, click **Yes** to confirm the deletion.

7.2.3 Activating or Deactivating Recognition Jobs

If online, recognition jobs run when selected in a client profile or processor job's **Post-Processing** train stop. You can temporarily stop the job from running (take it offline) or change a deactivated job to run again.

> **Note:** When reactivating a job, it may take up to a minute for the job to resume processing batches that were queued while the job was offline.

Follow these steps to change a Recognition Processor job to online or offline:

1. On the **Processing** tab, select a job in the Recognition Processor Jobs table. Notice that the Status column displays Online or Offline for each job.

2. Click the **Toggle Online/Offline** button to either activate the job or deactivate it.

   Note that you can also deactivate or activate a Recognition Processor job by selecting or deselecting the **Online** field on the **General Settings** train stop.

7.2.4 Configuring Post-Processing and Monitoring

Use a Recognition Processor job's post-processing options to specify what happens after processing completes. You specify the following settings separately for batches that processed successfully and for those that generated system errors:

To configure post-processing settings:

1. In a selected workspace, add or edit a Recognition Processor job. See Section 7.2.1.

2. Click the **Post-Processing** train stop.

   The screen lists the same 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. You can choose a batch processor of **None** (no processing occurs), **Commit Processor, Recognition Processor**, or **Document Conversion Processor**. If you choose Recognition Processor or Document Conversion Processor, specify a 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 to send an email after processing completes successfully or fails. While configuring and testing a Recognition Processor job, you might set yourself to receive email notifications upon system errors, 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.

7.2.5 Configuring 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 or other processor job. To configure batch flow from:

- A Client Profile, see Section 4.17.

- An Import Processor job, see Section 5.10.

- A Document Conversion Processor job, see Section 6.6.

For example, you might create a client profile that users use to scan documents into batches, and then release for recognition processing. Or, you might create an Import Processor job that imports email messages and their PDF attachments, then sends them to the Document Conversion Processor for conversion to image format, then send on 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 Section 7.1.1.

7.3 Configuring Jobs Based on Their Document Organization

Defining a recognition job's organization method is integral to configuring its document separation and indexing. This section describes how to configure recognition jobs for different organization types:

- Configuring a Job for Documents Containing a Fixed Number of Pages

- Configuring a Job for Documents with the Same Bar Code Value on Each Page

- Configuring a Job for Batches with Separator Pages between Documents

- Configuring a Job for Documents with Hierarchical Separators

- Configuring a Job for Batches that do not need Document Organization

7.3.1 Configuring 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 job's **Document Processing** train stop, 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, as illustrated in Figure 7–2. 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 page's back side 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, as described in Section 7.3.3.

Figure 7–2   Example: Documents With a Fixed Number of Pages (Single Page)
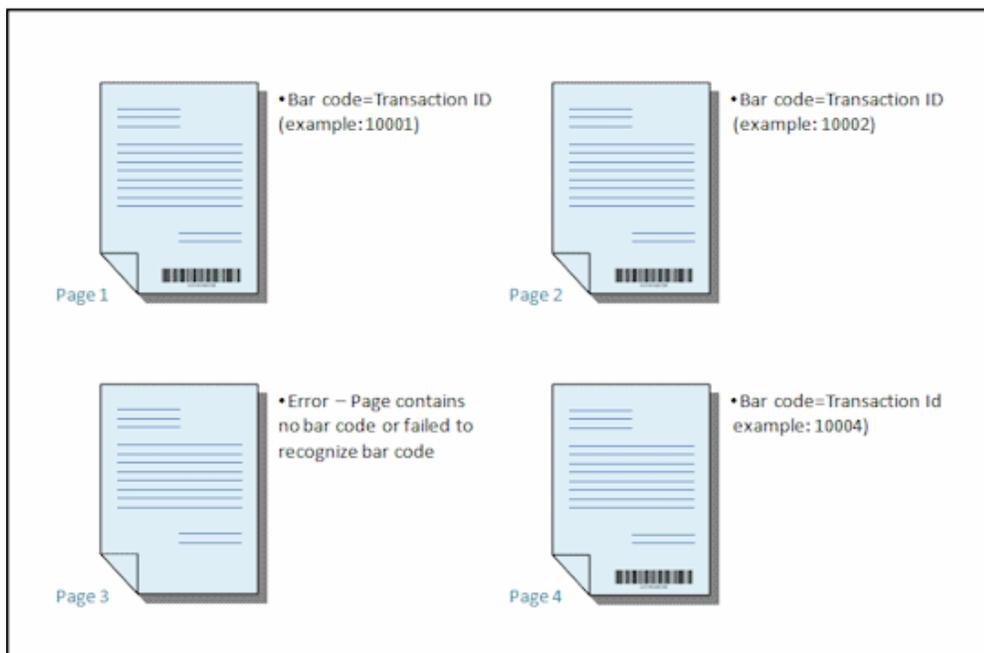
To configure a recognition job for documents containing a fixed number of pages:

1. On the **Processing** tab, add or edit a Recognition Processor job. See Section 7.2.1.

2. On the **Document Organization** train stop, select the **Fixed number of pages per document** method.

3. On the **Bar Code Recognition** train stop, configure bar codes to be recognized.

4. On the **Bar Code Definition** train stop, configure how bar codes are detected. See Section 7.1.2.1 and Section 7.4.1.

5. On the **Document Profile** train stop, specify the group of metadata fields to apply to the recognition job by selecting a previously created document profile (Section 3.10) in the **Default Document Profile** field. You can determine a document profile dynamically using a selected bar code. See Section 7.5.

6. On the **Document Processing** train stop, complete settings specific to **Fixed number of pages per document** jobs, whose organization is set on the **Document Organization** train stop.

   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 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** (Section 7.6) and **Database Lookup** (Section 7.7) train stops.

8. Click **Submit** and test the recognition job's functionality.

7.3.2 Configuring 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 job's **Document Processing** train stop, you specify which bar code the job uses to determine document separation and a maximum number of pages per document.

Figure 7–3 shows documents with the same bar code value on each page.

Figure 7–3   Example: Documents With the Same Bar Code Value on Each Page
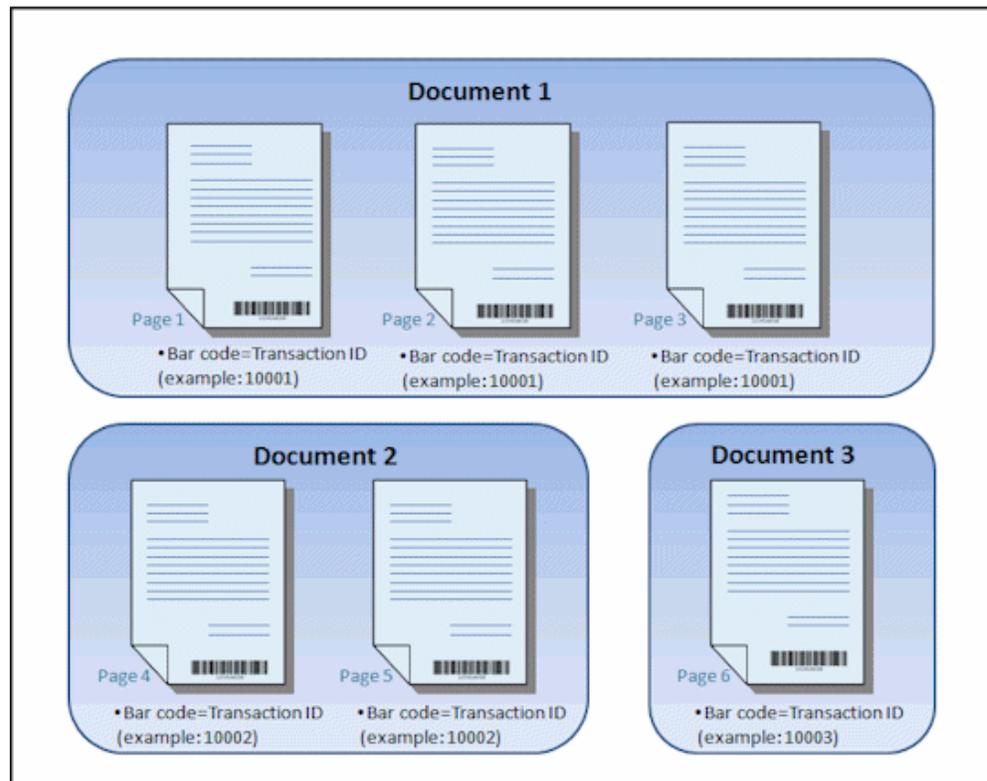
To configure a job for documents with the same bar code value on each page:

1. On the **Processing** tab, add or edit a Recognition Processor job. See Section 7.2.1.

2. On the **Document Organization** train stop, select the **Same bar code value on each page** organization.

3. On the **Bar Code Recognition** train stop, configure bar codes to be recognized.

4. On the **Bar Code Definition** train stop, configure how bar codes are detected. See Section 7.1.2.1 and Section 7.4.1. At a minimum, create the bar code definition that will determine document separation.

5. On the **Document Profile** train stop, specify the group of metadata fields to apply to the recognition job by selecting a previously created document profile

(Section 3.10) in the **Default Document Profile** field. You can determine a document profile dynamically using a selected bar code. See Section 7.5.

6. On the **Document Processing** train stop, 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.

7. Configure metadata assignment settings on the **Fields** (Section 7.6) and **Database Lookup** (Section 7.7) train stops.

8. Click **Submit** and test the recognition job's functionality.

7.3.3 Configuring 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. (Note that document organization for hierarchical levels of document separators is covered in Section 7.3.4.) With this organization type:

- The separator page indicates the beginning of a new document. Separator pages can be retained or discarded upon commit.

- 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 Section 7.4.2.

Figure 7–4 displays documents with separator pages that contain a bar code and two patch codes. In this example, because the separator pages do not contain content other than bar codes and patch codes, they are discarded.
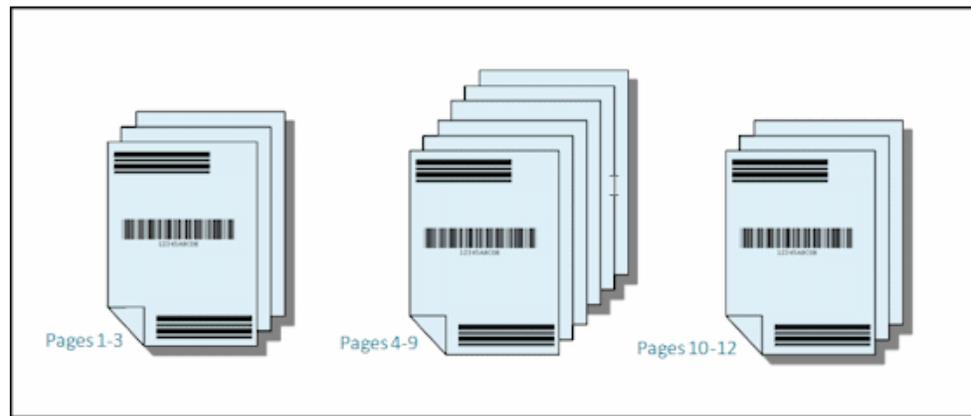
Figure 7–4   Example: Documents With Separator Pages Between Them

Figure 7–5 displays another example of documents with separator pages. These separator pages are detected by a PDF417 bar code. Because the bar code page is part of the actual document, the separator pages are retained.

Figure 7–5   Example: Documents With Separator Pages Between Them
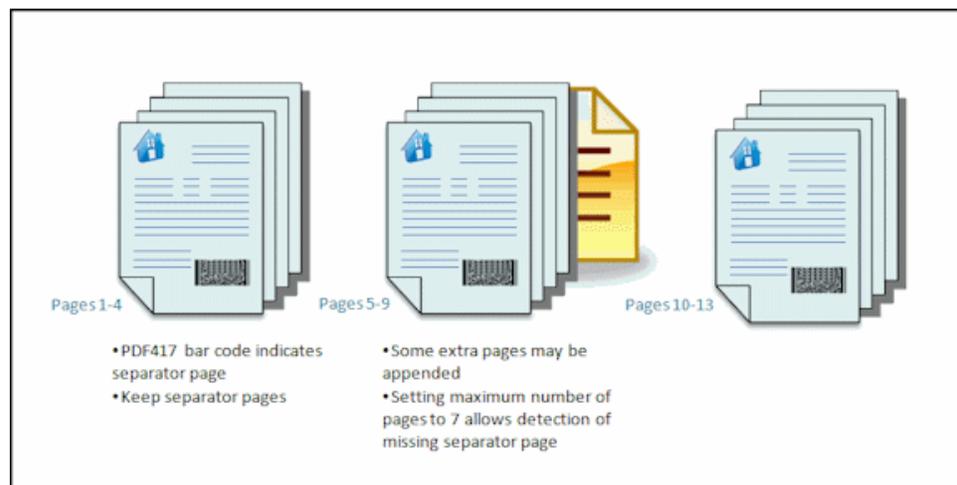
To configure a job for batches with separator pages between documents:

1. On the **Processing** tab, add or edit a Recognition Processor job. See Section 7.2.1.

2. On the **Document Organization** train stop, select the **Separator pages** method. (This method is the default document organization.)

3. On the **Bar Code Recognition** train stop, configure bar code symbologies to be recognized.

4. On the **Bar Code Definition** train stop, configure bar code settings for the documents to process. See Section 7.1.2.1 and Section 7.4.1. 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** train stop, specify the group of metadata fields to apply to the recognition job by selecting a previously created document profile (Section 3.10) in the **Default Document Profile** field. You can determine a document profile dynamically using a selected bar code. See Section 7.5.

6. On the **Document Processing** train stop, complete settings specific to the selected Document Organization (Separator pages).

    a. Click **Configure** and configure the separator page. See Section 7.4.2.

    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.

7. Click **Submit** and test the recognition job's functionality.

7.3.4 Configuring 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.

Figure 7–6 shows a hierarchy with two levels:

1. A top *Customer Folder* level, with a Customer Folder separator page whose patch code identifies a folder level and whose bar code identifies the customer using a Customer Number.

2. A lower *Document* level, with a Document separator page whose patch code identifies a document level and whose bar code identifies the document type. Documents inherit customer folder metadata values.

When a new *Customer Folder* separator page is encountered, the Customer Folder metadata value (Customer Number) is cleared and replaced, which also causes the last Document Type metadata value to be cleared. Note the following:

- 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.

Figure 7–6   Example: Hierarchical Document Separators With Two Levels
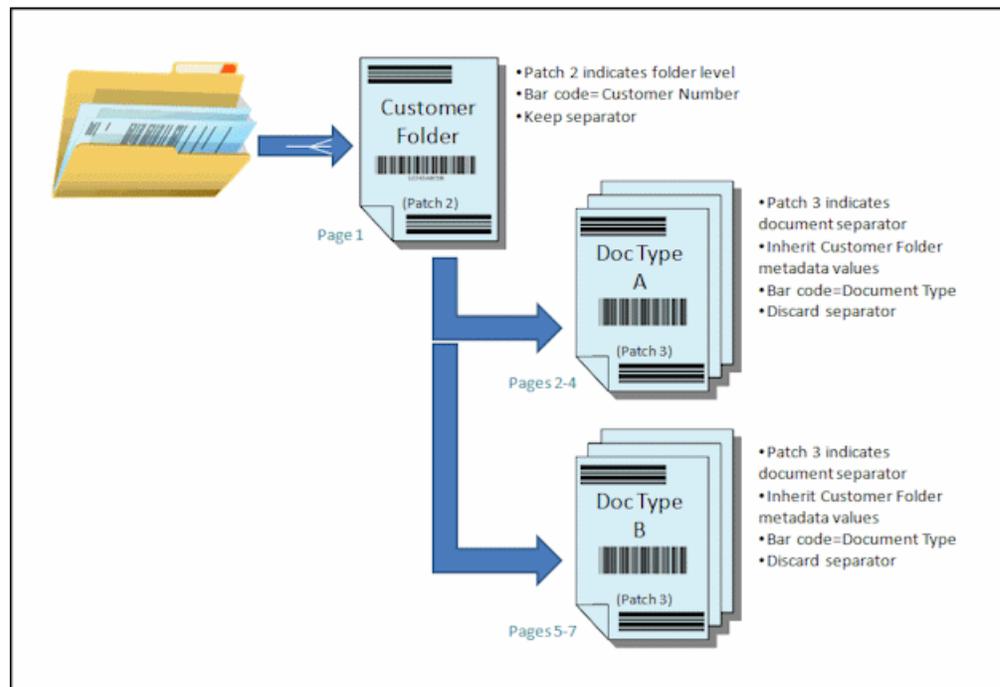
Figure 7–7 shows a more complex hierarchy with three levels:

1. A top *Box* level, with a Box separator page whose bar code identifies the box number and whose patch code identifies the folder level.

2. An intermediate *Customer Folder* level, with a Customer Folder separator page whose bar code identifies the customer number and whose patch code identifies the customer folder level.

3. A lowest *Document* level, with a Document separator page whose patch code identifies the document level and whose bar code identifies the document type. Documents inherit both customer folder and box levels.

When a new Customer Folder separator page is encountered, the Customer Folder related metadata value (Customer Number) is cleared and replaced, which also clears the last Document Type metadata value. When a new Box separator page is encountered, the Box Number, Customer Number, and Document Type metadata values are all cleared.

Figure 7–7   Example: Hierarchical Document Separators With Three Levels
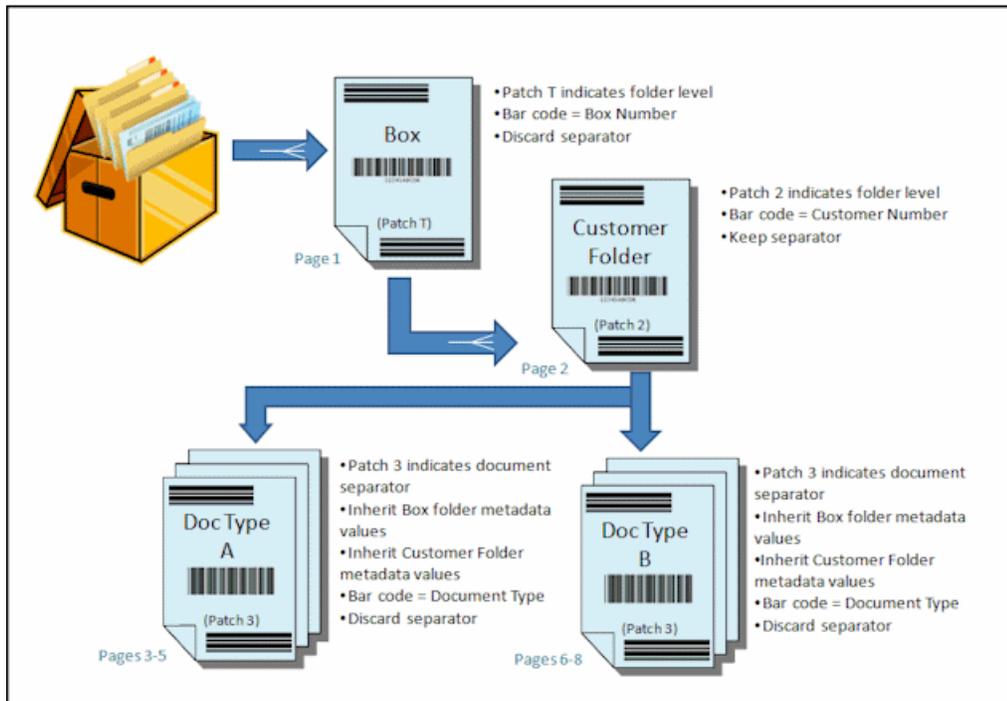
To configure a job for batches with hierarchical separators to organize documents:

1. On the **Processing** tab, add or edit a Recognition Processor job. See Section 7.2.1.

2. On the **Document Organization** train stop, select the **Hierarchical separator pages** method.

3. On the **Bar Code Recognition** train stop, configure bar codes to be recognized.

4. On the **Bar Code Definition** train stop, configure bar code settings for the documents to process. See Section 7.1.2.1 and Section 7.4.1. Configure all bar codes, including separator pages and any others that provide document profile or metadata values.

5. On the **Document Profile** train stop, specify the group of metadata fields to apply to the recognition job by selecting a previously created document profile (Section 3.10) in the **Default Document Profile** field. You can determine a document profile dynamically using a previously created bar code or page separation definition. See Section 7.5.

6. On the **Document Processing** train stop, 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. See Section 7.4.3.

   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.

7. Configure metadata assignment settings on the **Fields** (Section 7.6) and **Database Lookup** (Section 7.7) train stops.

8. Click **Submit** and test the recognition job's functionality.

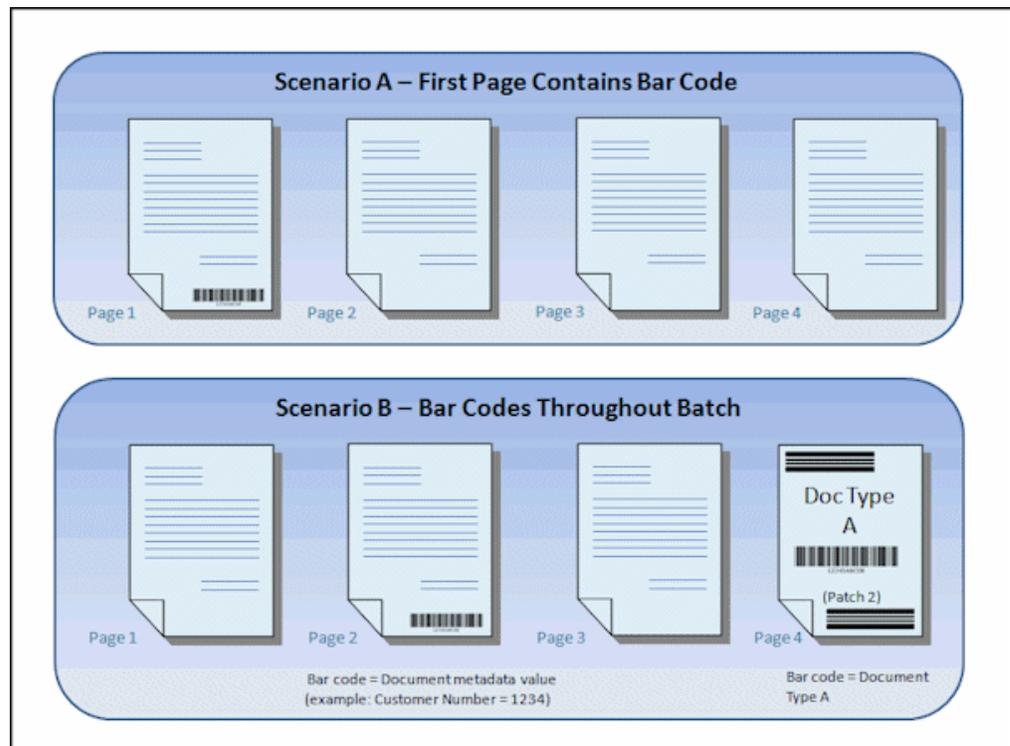## 7.3.5 Configuring a Job for Batches that do not need Document Organization

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.

Figure 7–8 displays two scenarios:

- In Scenario A, a bar code is found on the first page and all pages in the batch are indexed as a single document.

- In Scenario B, the pages containing the bar codes used to index the document (Customer Number and Document Type) are on different pages (pages 2 and 4, respectively).

Figure 7–8   Example: Documents Needing No Organization

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

1. On the **Processing** tab, add or edit a Recognition Processor job. See Section 7.2.1.

2. On the **Document Organization** train stop, select the **None: Do not perform document organization** method.

3. On the **Bar Code Recognition** train stop, configure bar codes to be recognized.

4. On the **Bar Code Definition** train stop, configure bar code definitions for the documents. See Section 7.1.2.1 and Section 7.4.1.

5. On the **Document Profile** train stop, specify the group of metadata fields to apply to the recognition job by selecting a previously created document profile (Section 3.10) in the **Default Document Profile** field. You can determine a document profile dynamically using a selected bar code. See Section 7.5.

6. On the **Document Processing** train stop, complete settings specific to no document organization jobs.

   a. Optionally, click **Configure** and set up a separator page definition. See Section 7.4.2. **Note**: The purpose of detecting a separator for this type of job is to remove it from the batch.

   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** (Section 7.6) and **Database Lookup** (Section 7.7) train stops.

8. Click **Submit** and test the recognition job's functionality.

7.4 Configuring Bar Code, Patch Code, and Separator Page Definitions

This section describes how you configure definitions for bar codes and separator pages for a recognition processing job. Note the following guidelines:

- 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.

This section covers the following topics:

- Section 7.4.1, "Adding, Editing, or Deleting Bar Code Definitions"

- Section 7.4.2, "Configuring a Separator Page Definition"

- Section 7.4.3, "Configuring Hierarchical Separator Page Definitions"

7.4.1 Adding, Editing, or Deleting 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,

assigning document profiles, and performing database lookups. (Bar code definitions are not shared between Recognition Processor jobs.)

1. Add or edit a recognition job, as described in Section 7.2.1.

2. On the **Bar Code Definition** train stop, click the **Add** button in the Bar Code Definitions table.

3. In the **Bar Code Definition** window, enter a name for the bar code definition.

4. In the **Validation Rule** field, specify how Recognition Processor should validate the bar code, as described in Table 7–2.

Table 7–2   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. See Section 7.8.
Length	Maps any bar code value where the length of the bar code value matches the definition. **Note:** 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 Table 7–3.
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: http://docs.oracle.com/javase/tutorial/essential/regex/
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 7–3 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 *claim*, the format would be [c][l][a][i][m].
[!abc]	[^abc]	Matches any single character not specified. Functions the same as *[abc]*, except that with the exclamation point, a match results if any character *except* the characters specified in [*abc*] 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.

7.4.2 Configuring a Separator Page Definition

As described in Section 7.1.2.2, if you choose to organize documents using separator pages, you must configure one or more rules that define how separators are detected and used. Follow these instructions to configure separator pages. To configure hierarchical separator page definitions, see Section 7.4.3.

1. In a selected workspace, 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** train stop, click the **Configure** button next to Separator Page. To delete the separator page definition, click the **Delete** button next to the **Configure** button.

   The **Separator Page Definition** screen displays, on which you define or edit the separator page by specifying one or more rules.

3. In the **Name** field, enter a name for the separator page definition. Optionally, select the **Delete this separator page upon commit** field to remove the separator

page from the document. If deselected (the default), separator pages are included in the document.

4. Click the **Add** button in the Rules table. To edit a rule, select it and click the **Edit** button.

5. In the Separator Page Rule window, create a rule as shown in Figure 7–9.

   a. Enter a name in the **Rule Name** field.

   b. 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.

   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**.

Figure 7–9   Separator Page Rule to Start a New Document Upon Detecting a Specified Bar Code, Patch Code, or Both

6. Repeat steps 4 and 5 to create additional rules in the Rules table.

   a. In addition to specifying *And* or *Or* conditions *within* rules (see Figure 7–9), you specify *And* or *Or* conditions *between* rules, by selecting **And** or **Or** in the **Operator** field in the Rules table. In Figure 7–10, either Rule 1 OR Rule 2 must match for separator detection, and each rule provides two methods for matching (patch code OR bar code).

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

   c. Click **Submit** to save the separator page definition.

Figure 7–10   Separator Page Definition for Document Separation
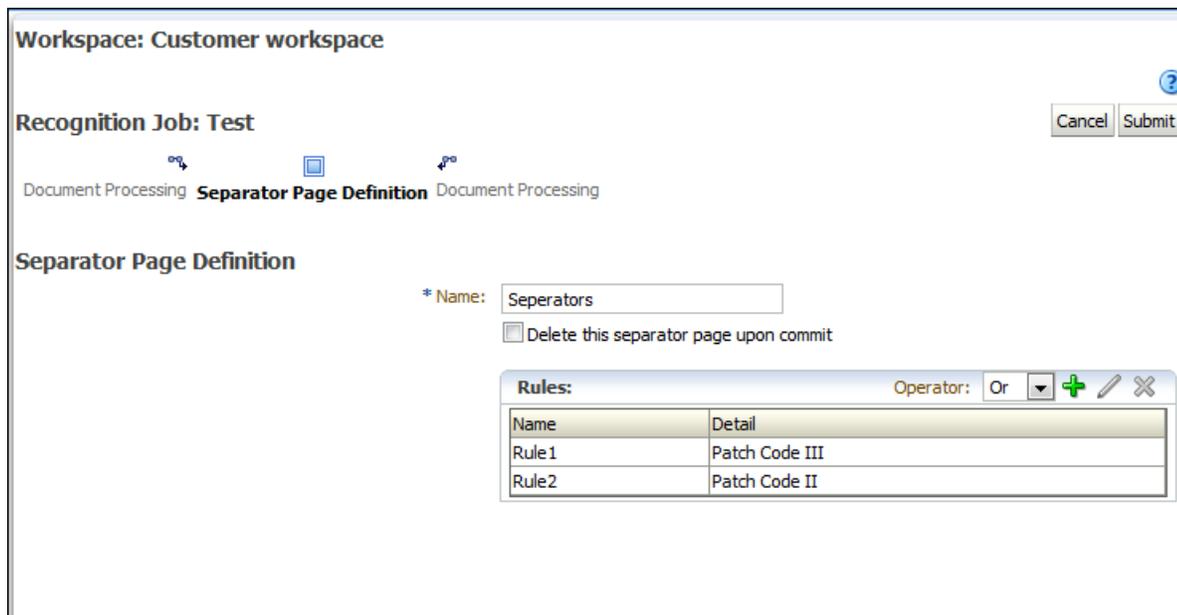
7. Click **Submit** to save the job.

7.4.3 Configuring Hierarchical Separator Page Definitions

As described in Section 7.1.2.2, 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 Section 7.4.2.)

For example, Figure 7–11 displays hierarchical separator pages defined for box, customer, and document levels.

Figure 7–11   Hierarchy of Separator Page Definitions

To configure page separation for hierarchical separator jobs:

1. In a selected workspace, add or edit a hierarchical separator page job. See Section 7.3.4.

2. On the **Document Processing** train stop, click the **Add** button in the Document Hierarchy Separator Pages table to add a hierarchical separator page definition. To edit a definition, select it and click the **Edit** button.

3. On the Separator Page Definition screen, create a definition for one of the hierarchy levels. For example, Figure 7–12 shows a definition for Customer level separation.

   a. In the **Name** field, enter a name for the separator page definition.

   b. Optionally, select the **Delete this separator page upon commit** field to remove the separator page from the document. If deselected (the default), separator pages are included in the document.

Figure 7–12 Separator Page Definition for Document Separation
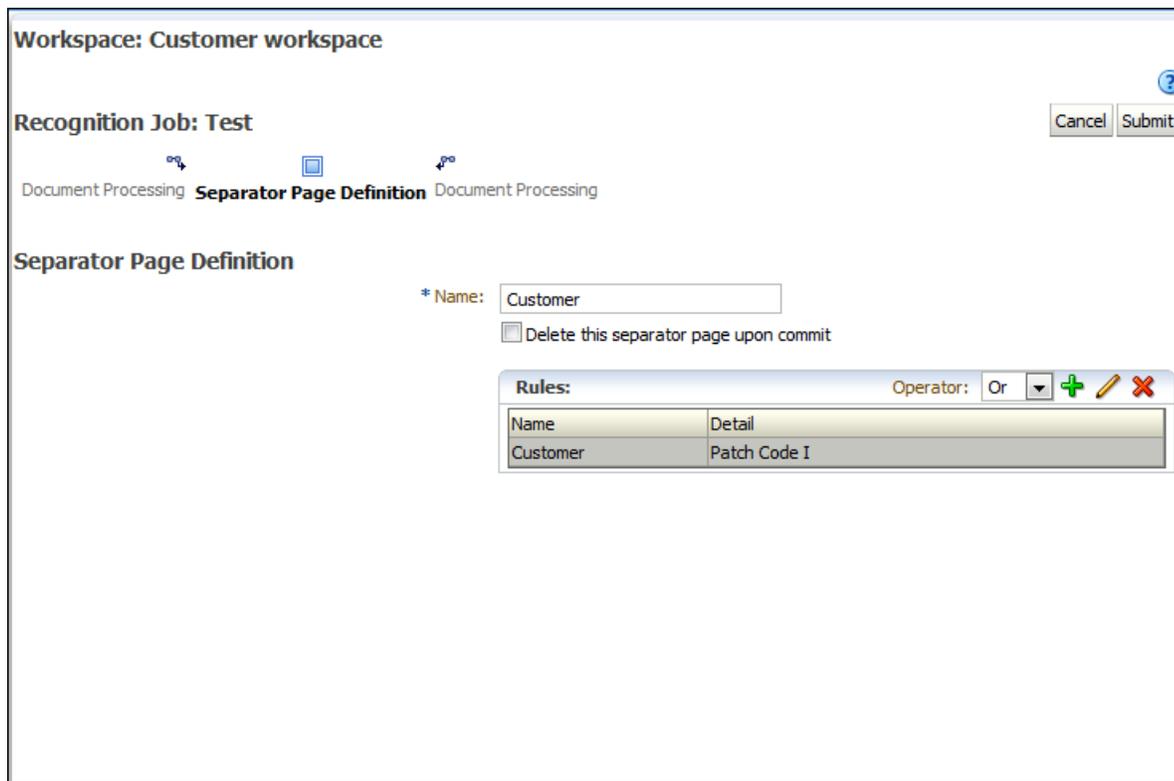
4. Add or edit rules for the separator page definition.

   a. Click the **Add** button in the Rules table.

   b. To edit a rule, select it and click the **Edit** button.

5. In the Separator Page Rule window, define a rule as shown in Figure 7–13.

   a. Enter a name in the **Rule Name** field.

   b. 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.

   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**.

Figure 7–13   Separator Page Rule to Start a New Document Upon Detecting a Specified Bar Code, Patch Code, or Both
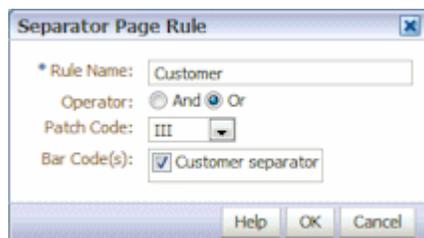
6. Repeat steps 4 and 5 to create additional rules for the page separator.

   a. In addition to specifying *And* or *Or* conditions within rules (see Figure 7–13), 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 the **Delete** button.

   c. Click **Submit** to save the separator page definition.

7. The separator page definition you created is listed in the Document Hierarchy Separator Pages table. Repeat steps 2 through 6 to create additional page separator definitions.

   ■ To remove a definition, select it in the table and click the **Delete** button.

   ■ Click the **Up** or **Down** buttons to move a selected definition up or down in the hierarchy to correctly reflect how the separator pages will be organized within a batch.

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

7.5 Specifying a Static or Dynamically Determined Document Profile

This section describes how to configure a recognition job to determine the document profile, which identifies the metadata fields available to index a document. For background information, see Section 7.1.2.3.

**1.** In a selected workspace, create a Recognition Processor job. See Section 7.2.1.

2. Select the **Document Profile** train stop 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, as shown in Figure 7–15.

   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 the **Edit** button. In the Document Profile and Bar Code Value Mappings window shown in Figure 7–14, 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.

Figure 7–14 Separator Page Rule to Start a New Document Upon Detecting a Specified Bar Code, Patch Code, or Both
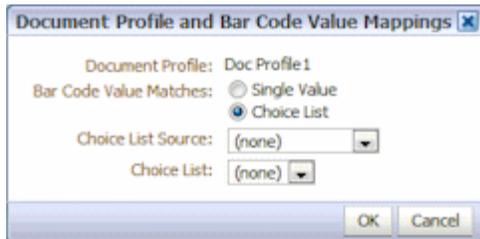
Map additional document profiles to bar code values in the table, if needed.

Figure 7–15 Determining Document Profile Dynamically Using Bar Code
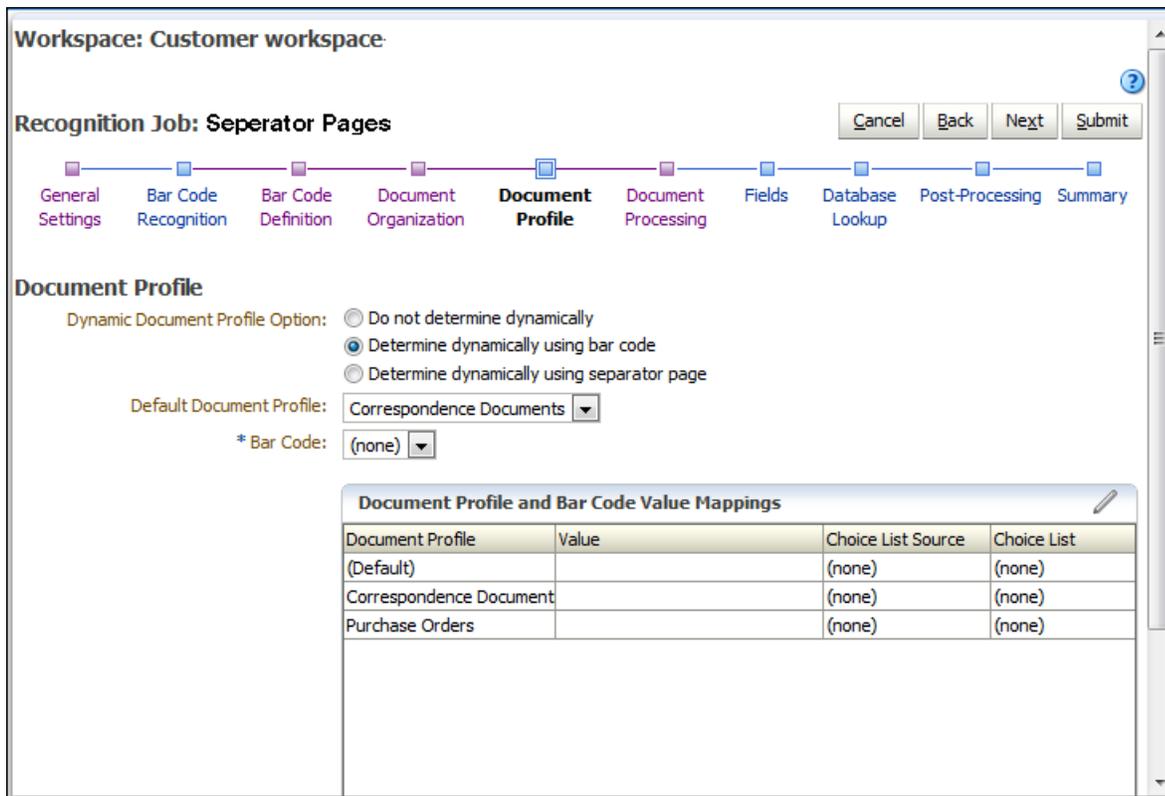
6. If you selected **Determine dynamically using separator page** in step 4, complete configuration.

   a. Click the **Document Processing** train stop. A **Document Profile** column displays in the Document Separator Hierarchy Pages table.

   b. Click the **Add** or **Edit** button in the table.

c. On the Separator Page Definition screen, select a profile in the **Document Profile** field for the hierarchy separator page.

d. Repeat steps b and c to assign document profiles to hierarchy separator page definitions.

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

7.6 Specifying Metadata Field Auto Population

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

1. In a selected workspace, create a Recognition Processor job. See Section 7.2.1.

2. Click the **Fields** train stop. A table listing metadata fields defined for the workspace displays.

3. Select a field to auto populate and click the **Edit** button.

4. In the Edit Recognition Job window that displays, 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.

7.7 Configuring Database Lookups in Recognition Processing Jobs

You can use database lookups to populate metadata fields during recognition processing in several ways:

- Using a Bar Code Value to Perform a Database Lookup
- Using a Metadata Value to Perform a Database Lookup

7.7.1 Using a Bar Code Value to Perform a Database Lookup

Follow these steps to perform a lookup that searches a database for a matching bar code value. For example, you might search on an account number detected on a bar code to populate additional metadata fields with account information during processing.

1. In a selected workspace, create the database lookup profile on the **Metadata** tab.

   See Section 3.8.

2. Create or edit a Recognition Processor job. See Section 7.2.1.

3. On the **Bar Code Definition** train stop, add a bar code definition.

   See Section 7.4.1.

4. On the **Database Lookup** train stop, choose **Bar Code** in the **Using** field.

5. In the **Bar Code** field, select the bar code definition you created in step 3.

6. In the **Database Lookup Profile** field, select the database lookup profile you created in step 1.

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

When the job runs, Recognition Processor searches this database field for a value that matches the bar code value. If a match is found, it populates the other metadata fields from the database record based on the Return Fields defined in the Database Lookup profile.

8. Specify actions for the job in the **When more than one record is found** and **When no record is found** fields.

9. Click **Submit** to save the recognition job.

10. Test the database lookup.

For example, view its results in the client. Ensure that the specified metadata fields were populated correctly.

7.7.2 Using a Metadata Value to Perform a Database Lookup

Follow these steps to perform a lookup that searches a database for a matching metadata value. When would you search on a metadata value rather than a bar code value? For example, if the bar code contained multiple field values that were separated using a script and you wanted to perform a database search on one of the values, you would configure the search using a metadata value and not the bar code value.

1. In a selected workspace, create the database lookup profile on the **Metadata** tab.

See Section 3.8.

2. Create or edit a Recognition Processor job. See Section 7.2.1.

3. On the **Database Lookup** train stop, choose **Field Value** in the **Using** field.

4. In the **Field Name** field, select a metadata field from those defined for the workspace on the **Metadata** tab.

5. In the **Database Lookup Profile** field, select the database lookup profile you created in step 1.

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

When the job runs, Recognition Processor searches this database field for a value that matches the metadata value. If a match is found, it populates the other metadata fields from the database record based on the Return Fields defined in the Database Lookup profile.

7. Specify actions for the job in the **When more than one record is found** and **When no record is found** fields.

8. Click **Submit** to save the recognition job.

9. Test the database lookup.

For example, view its results in the client. Ensure that the specified metadata fields were populated correctly.

7.8 Customizing Recognition Processing Using Scripts

To customize Recognition Processor behavior, incorporate a JavaScript. For example, you might use a script to split a single bar code value into multiple field values.

To use a script in a Recognition Processor job:

1. From a developer, obtain a Recognition Processor JavaScript file.

   Information on writing Recognition Processor scripts is provided in *Oracle Fusion Middleware Developing Scripts for Oracle WebCenter Enterprise Capture*.

2. On the workspace's **Advanced** tab, import a script, specifying **Recognition Processor** as its script type, and identifying the script file. For more information, see Section 3.11.

3. On the **Processing** tab, select the Recognition Processor job and click the **Edit** button.

4. In the **Script** field on the **General Settings** train stop, select the Recognition Processor script you imported.

5. Test the results of the added recognition script.

   On the **Post-Processing** train-stop, set the **Batch Processor** to **(none)** so that you can observe the post processing results within the client.

7.9 Handling Recognition Processing System Errors

A Recognition Processor job might encounter system errors such as the following during processing:

- Errors processing the image or performing bar code recognition.

- Errors performing a database lookup.

- Errors related to accessing the database, such as a network failure.

If an error occurs with a document's separation or its bar code or patch code recognition, it becomes unclassified and is put in an unlocked (hold) state. Qualified client users can then classify and index the document.

In addition to email notification, the Capture system administrator can consult the Recognition Processor performance metrics and logs to address system issues.

8

Managing Commit Processing

As the final step in Capture processing, committing applies the settings in commit profiles defined for the workspace, and outputs batch documents and their metadata in a selected output format to a specific location or content repository. After batches are successfully committed, they are permanently removed from the Capture workspace.

This chapter describes how you configure and manage commit profiles and their processing for a workspace. It includes the following sections:

- Introduction to Commit Processing
- Adding, Copying, or Editing a Commit Profile
- Deleting a Commit Profile
- Activating and Ordering Commit Profiles
- Restricting a Commit Profile Based on Document Profile
- Configuring a Text File Commit Profile
- Configuring a WebCenter Content Commit Profile
- Configuring a WebCenter Content Imaging Direct Commit Profile
- Configuring a WebCenter Content Imaging Input Agent Commit Profile
- Configuring an Oracle Documents Cloud Service Commit Profile
- Configuring PDF Searchable Document Output
- Configuring Batch Flow to the Commit Processor

8.1 Introduction to Commit Processing

This section covers the following topics:

- Section 8.1.1, "Methods of Committing Documents"
- Section 8.1.2, "About Image Document Output Formats"
- Section 8.1.3, "How Non-Image Documents Are Committed"
- Section 8.1.4, "How Commit Profiles are Applied During Commit Processing"
- Section 8.1.5, "About Commit Error Handling"
- Section 8.1.6, "About Documents Remaining After Commit"
- Section 8.1.7, "About Commit Processor Logging"

8.1.1 Methods of Committing Documents

Organizations choose to commit batches in a variety of ways, depending on configuration and needs.

- Some organizations use the **WebCenter Content Commit Driver** or **WebCenter Content Imaging Commit Driver** to commit documents directly into these content repositories.

- Some organizations use the **Oracle Documents Cloud Service Commit Driver** to commit documents directly into Oracle Documents Cloud Service.

- Some organizations use the **Text File Commit Driver** to output to a folder and list file, for later use in a variety of ways. Another process might process the documents for intelligent data recognition (for example, using Oracle WebCenter Forms Recognition), or import documents independently into their content management system. You can customize the contents of commit text files, but they typically contain a reference to each document file and associated metadata values.

You can configure multiple commit profiles to process for a workspace. For example, one commit profile may commit documents to a content management system, while another commits to a text file. A Service Bureau might output to a commit text file containing references to images, then FTP the information to clients. Still another organization might commit directly into their content management system and create a commit text file for backup, to be kept for 90 days or archived permanently.

Figure 8–1 Commit Profile General Settings

8.1.2 About Image Document Output Formats

Regardless of the format in which image documents were captured and formatted in Capture, you can output them to one of the following formats upon commit:

- **TIFF Multi-Page:** Outputs documents to multiple page, Group 4 TIFF format.

- **PDF Image-Only**: Outputs documents to PDF/A format.

- **PDF Searchable**: Outputs documents to PDF (portable document format) containing the original image with hidden text to facilitate full-text searching of the document. Refer to the Capture Certification Matrix for a list of platforms that support the Searchable PDF.

> **Caution:** The text generated from OCR results for Searchable PDF documents CANNOT be edited and may contain recognition errors.

8.1.3 How Non-Image Documents Are Committed

Non-image documents include files such as Microsoft Word, Microsoft Excel, PDF, or EML documents. Depending on configuration, non-image files may be retained in their native format in Capture. At 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. The document output setting is ignored for all non-image documents in the batch, but applied to any image documents.

  For example, a Microsoft Word document committed by a commit profile configured to output Searchable PDF is committed to the repository as a Word document. Similarly, email messages captured and stored in EML format and output to Content Server are committed in EML format regardless of the commit profile's selected document output format.

- Once non-image documents have been successfully committed by all online and applicable commit profiles, they are deleted from the Capture workspace just like image documents.

8.1.4 How Commit Profiles are Applied During Commit Processing

Batches arriving at commit processing are ready to undergo processing by one or more commit profiles defined for the workspace. 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, **Commit Processor** must be selected as a post-processing step in the client profile or processor job.

2. Capture runs all commit profiles defined for the workspace on the batch, subject to the following rules:

   a. Commit profiles run one at a time, in the order in which they are specified on the workspace's **Commit** tab.

   b. Commit profiles must be **Online**. Changing a profile to **Offline** deactivates its use in commit processing for the workspace.

   c. A commit profile skips processing any documents whose assigned **document profile** does not match the document profiles assigned to the commit profile.

See Section 8.5.

> **d.** As 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, as described in Section 8.1.5.

3. Capture commits documents in the batch.

> **a.** 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, Capture deletes the batch.
>
> If a document fails to be committed, it remains in the batch and an error is generated.
>
> **c.** Based on system configuration, Capture outputs records to the audit table.

4. When a document has been successfully committed by all applicable commit profiles, Capture removes the document's files and associated metadata from the batch. If all documents are committed, the batch is deleted from the workspace.

8.1.5 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 has been successfully committed with a commit profile. When a document is about to be committed by a commit profile, a check is performed to see if the document has already been successfully committed by the commit profile. If it has, the document 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.

8.1.6 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 Capture Client.

8.1.7 About Commit Processor Logging

The Capture system administrator can consult the Commit Processor performance metrics and logs to address commit processing issues and errors. For more information, see *Oracle Fusion Middleware Administering Oracle WebCenter Enterprise Capture*.

8.2 Adding, Copying, or Editing a Commit Profile

To add, copy, or edit a commit profile:

1. In a selected workspace, click the **Commit** tab.

2. In the Commit Profiles table, click the **Add** button or select a commit profile and click the **Edit** button.

   You can also copy a commit profile by selecting one, clicking the **Copy** button, and entering a new name when prompted. Copying a commit profile allows you to quickly duplicate and modify it.

3. Complete settings on the **General Settings** train stop.

   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 workspace is processed by the Commit Processor. See Section 8.4.

   c. In the **Commit Driver** field, select the method by which the profile commits batches. See Section 8.1.1.

   d. In the **Document Output Format** field, specify the format in which to commit image documents. See Section 8.1.2 and Section 8.11.

   e. 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 Section 8.1.5.

   f. 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 Section 8.5.

   g. If adding a text file commit profile, complete date format, locale, and encoding settings to be used in text files in the **Default Date Format, Default Locale,** and **Encoding** fields. If adding an Oracle Documents Cloud Service commit profile, complete date format and locale settings to be used in documents in the **Default Date Format** and **Default Locale** fields.

4. On the **Commit Driver Settings** train stop, complete driver-specific settings.

   a. For text file, see Section 8.6.

   b. For WebCenter Content, see Section 8.7.

   c. For WebCenter Content Imaging, see Section 8.8.

   d. For Oracle Documents Cloud Service, see Section 8.10.

5. On the **Document Output Settings** train stop, specify settings for PDF Searchable output such as optional text file and OCR options. See Section 8.11.

   This train stop is available only if you selected **PDF Searchable** in the **Document Output Format** field on the **General Settings** train stop.

6. Review settings on the **Summary** train stop and click **Submit** to save the commit profile.

7. Configure how batches flow to commit processing. See Section 8.12.

8. 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. For more information, see Section 8.4.

9. 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. See Section 2.5.4.

8.3 Deleting a Commit Profile

Deleting a commit profile makes it unavailable for batches for which commit processing is set as a post-processing step. You may want to change a commit profile to offline for a time before deleting it, allowing you to resolve unexpected issues with its deletion.

To delete a commit profile:

1. In a selected workspace, select the **Commit** tab.

2. In the Commit Profiles table, select a profile to delete and click the **Delete** button.

   To deactivate a commit profile instead, select it and click the **Toggle Online/Offline** button.

3. When prompted, click **Yes** to confirm the deletion.

8.4 Activating and Ordering Commit Profiles

Commit profiles apply to all batches committed from the associated workspace. 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 Section 8.5.

To activate and order commit profile processing.

1. In a selected workspace, click the **Commit** tab.

2. To activate or deactivate a commit profile, select a commit profile in the Commit Profiles table and click the **Toggle Online/Offline** button.

   Active commit profiles display *Online* in the Status column, and inactive ones display *Offline*.

3. 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.

8.5 Restricting a Commit Profile Based on Document Profile

As described in Section 8.1.4, when a batch reaches commit processing as a final post-processing step, the Commit Processor runs the batch 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. For example, you might use this method to configure one commit profile to commit Purchase Order documents to WebCenter Content Imaging and another commit profile to commit Customer Agreement documents to Content Server.

To restrict a commit profile's execution based on document profile:

1. In a selected workspace, click the **Commit** tab.

2. In the Commit Profiles table, select a commit profile and click the **Edit** button.

3. In the **Restrict Commit to Document Profiles** field on the **General Settings** train stop, select one or more document profiles to commit only those documents assigned the selected document profiles.

8.6 Configuring a Text File Commit Profile

A text file commit profile creates a delimited text file that contains the full path to each document file, followed by document metadata. The document files are extracted from the batch, formatted, and output to a specified folder.

You can configure text file commit driver settings. For example, you can specify where files are written, which values are written and delimited in the text file, and how files are named.

Figure 8–2 Text Commit Driver Settings

To configure text file commit driver settings:

1. In a selected workspace, create a commit profile. See Section 8.2.

2. Select settings on the **General Settings** train stop.

    a. Select **Text File** in the **Commit Driver** field.

    b. In the **Default Date Format**, **Default Locale**, and **Encoding** fields, complete date format, locale, and encoding settings to be used in text files.

3. Select the **Commit Driver Settings** train stop.

    Because you selected **Text File** as the commit driver, this train stop displays settings specific to text file commits.

4. On the **Text File Folder** tab, specify how to write commit text files.

    a. In the **Commit Text File Folder** field, enter a location to which to write the commit text files. Use a fully qualified folder path relative to the Capture server's operating system.

    b. Optionally, select the **Store in subfolders** field and its related field to store commit text files in subfolders named based on:

    - Year

    - Year and Month

    - Year, Month, and Day

    c. In the **File Prefix** and **File Extension** fields, specify an optional prefix and extension.

5. On the **Document Folder** tab, specify how to write the document files.

a. In the **Document Folder** field, enter a location to which to write the document files. Use a fully qualified folder path relative to the Capture server's operating system.

b. Optionally, select the **Create a folder per committed batch** field to create a folder for each committed batch, where folders are named using the syntax *BatchID.WorkspaceID*.

c. Optionally, under **Subfolder Options**, select **Store in subfolders** to store document files in subfolders, then specify how to name the subfolders. You can name subfolders based on:

- Year

- Year and Month

- Year, Month, and Day

You can also name subfolders based on one or more metadata field values. Select **Metadata Field(s)**, click **Configure**, and select and order one or more metadata fields; the **Subfolder Path** field displays the structure of the subfolder path using the specified metadata fields.

d. In the **If folder name consists of invalid characters** field, specify how Capture should handle any invalid characters found in folder names (remove the characters or cancel the document's commit).

6. On the **Formatting** tab, specify the metadata fields and delimiters to use in the commit text file.

a. In the **Field Delimiter** field, specify the character to use to separate fields. If you choose **Other**, enter a character in the **Other Character** field that becomes available.

b. Optionally, in the **Text Qualifier** field, specify the character mark to use to identify the beginning and end of text fields. The default value for this field is **(none)**.

c. From the **Available Fields** list, select metadata fields to include in the commit text file and move them to the **Selected Fields** list. For example, you might include the two document file fields <File Name (full path)> and <Document ID> (<Document ID> is a system generated field that represents a GUID for the document). Reorder the metadata fields as needed. **Note**: The order of the fields represents the order that the metadata fields appear in a document record.

7. On the **Document File Naming** tab, specify how to name the document files.

a. Optionally, select the **Name document file based on Metadata field values** field to name the document file based on one or more selected metadata field values. If this field is not selected, Capture names the document 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.

b. Order the selected fields. The order of the fields affects the naming of the document file.

c. In the **Field Delimiter** field, specify the field delimiter to use (a space is the default).

d. In the **If File Name Consists of Invalid Characters** field, specify how Capture should handle any invalid characters found in document file names.

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

9. Test the commit profile.

   After committing a batch, locate the commit folder and view its contents, including text file and document files.

8.7 Configuring a WebCenter Content Commit Profile

This section covers the following topics:

- Section 8.7.1, "About the WebCenter Content Commit Driver"
- Section 8.7.2, "Configuring WebCenter Content Commit Driver Settings"
- Section 8.7.3, "Titling and Naming WebCenter Content Document Files"
- Section 8.7.4, "Assigning Metadata During a Content Server Commit"
- Section 8.7.5, "Mapping to Custom Content Server Fields"

8.7.1 About the WebCenter Content Commit Driver

Use the WebCenter Content Commit Driver to commit documents from Capture to Content Server. This commit driver uses the Content Server RIDC API.

Configuring the driver settings involves the following main steps. Detailed steps are provided in Section 8.7.2.

1. Create a commit profile and select WebCenter Content as the commit driver.

2. Connect to the Content Server instance after entering login information.

3. Specify how to check-in the documents into WebCenter Content, including how to title them, and who can view and access them. You can assign type, security group, and account values to documents using one of these methods:

   – Assign them a static value

   – Assign them based on Capture metadata field values

   – Assign them based on choice list values users select

4. Map Capture metadata fields to WebCenter Content fields. As documents are committed using this driver, metadata values entered in Capture are written into the specified Content fields.

5. Set additional options, such as document file naming, workflow bypass, and web service overrides.

Figure 8–3   Content Commit Driver Settings

8.7.2 Configuring WebCenter Content Commit Driver Settings

To create a Content commit profile, you need login credentials to a WebCenter Content server instance. To configure WebCenter Content commit driver settings:

1. In a selected workspace, create a commit profile. See Section 8.2.

2. On the **General Settings** train stop, select **WebCenter Content** in the **Commit Driver** field.

3. Select the **Commit Driver Settings** train stop.

    Because you selected **WebCenter Content** as the commit driver, this train stop displays settings specific to WebCenter Content commits.

4. On the **Login** tab, enter a user name, password, and server URL to log in to the WebCenter Content server instance during commit. This user must have permission to check-in documents into Content. The user name and password are case sensitive. Use the following format for the **Server URL**:

    ```
    http://hostname:port/cs/idcplg
    ```

    Click **Login**. Upon successful login, the status changes to *Connected*, and the remaining tabs become available.

5. On the **Check-In** tab, specify the document title, type, security group, and account within Content.

    a. For information about document titles, see Section 8.7.3.

    b. For information about specifying Type, Security Group, and Account metadata values, see Section 8.7.4.

6. On the **Field Mappings** tab, map Capture metadata fields to Content Server fields. As documents are committed using this driver, the document's metadata field values are written into the specified Content Server fields. To map a Content Server field, select one and click the **Edit** button. In the window that displays, select the Capture field.

   When **Assign Values Dynamically** and **By Field Mappings** are selected on the **Check-In** tab, the following additional fields are displayed in the **Content Server Field** column on the Field Mappings tab: <Account>, <Content Type>, and <Security Group>. Mapping these fields allows metadata values to be dynamically assigned at commit, based on these Capture field values.

   For information about mapping to custom Content Server fields, see Section 8.7.5.

7. On the **Options** tab, specify settings to customize the document check-in process, such as naming document files and providing an alternative check-in service. See Section 8.7.3.

8.7.3 Titling and Naming WebCenter Content Document Files

When committing files to Content Server, you can specify a document title and a document file name for them using a similar process.

To specify document titles or document file names:

1. While creating a WebCenter Content commit profile (Section 8.7), display the title/file name builder window:

   a. For document titles, click the **Configure** button next to **Document Title** on the **Check-In** tab.

   b. For document file names, click the **Configure** button on the **Options** tab.

   The title or name builder window is displayed, as shown in Figure 8–4.

Figure 8–4   Document File Name Builder
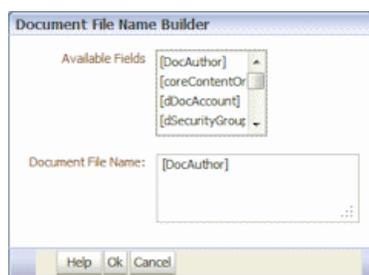
2. Construct a document title or file name.

   From the **Available Fields** list, select a Capture field to add it to the title or name (multiple Capture fields can be selected).

   Use the Document Title or Document File Name list to build the title or name. You can include the following elements:

   - Literal characters: Enter alphanumeric characters
   - Capture metadata fields

8.7.4 Assigning Metadata During a Content Server Commit

You can assign values to Content Server fields:

- Using Static Values
- Based on Capture Metadata Values
- Based on User's Choice List Selections

8.7.4.1 Using Static Values

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

1. On the **Check-In** tab of the **Commit Driver Settings** train stop configured for a WebCenter Content commit, select values in the **Default Type**, **Default Security Group**, and **Default Account** fields.

8.7.4.2 Based on Capture Metadata Values

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

1. On the **Check-In** tab of the **Commit Driver Settings** train stop configured for a WebCenter Content commit, select the **Assign Values Dynamically** field, then choose **By Field Mappings**. This adds <Account>, <Content Type>, and <Security Group> metadata mappings to the **Field Mappings** tab.

2. On the **Field Mappings** tab of the **Commit Driver Settings** train stop configured for a WebCenter Content commit, select a Capture metadata field for each of the metadata mappings fields.

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

8.7.4.3 Based on User's Choice List Selections

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

This configuration requires either a user defined choice list (Section 3.5) or a database choice list (Section 3.6).

1. On the **Check-In tab** of the **Commit Driver Settings** train stop configured for a WebCenter Content commit, select the **Assign Values Dynamically** field, then choose **By Metadata Field**.

2. In the **Metadata Field** field, select the Capture field whose choice list value is used to assign type, security group, and account.

3. In the **Choice List Source** field, select **Capture Source** or a previously created database choice list source.

4. In the **Choice List** field, select the choice list from those available for the source you selected.

5. In the Content Attribute Mapping table, click the **Add** button.

6. In the Add/Edit Metadata Mappings window that displays, select a choice list value and select options in the **Type**, **Security Group**, and **Account** fields.

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

■ The **Account** field contains a <No Account> option that you can select to skip assigning a value to the Account metadata field. Type and Security Group are required.

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

8.7.5 Mapping to Custom Content Server Fields

In addition to mapping Capture metadata fields to Content Server fields on the **Field Mappings** tab, as described in Section 8.7.2, you can map Capture fields to custom Content Server fields. You might do this, for example, when you have custom code running on the Content Server that specifically references these fields. (Without custom code, these custom fields are ignored.)

To add, edit, or delete custom Content Server fields for metadata mapping:

1. On the **Field Mappings** tab (Section 8.7.2), click the **Add** button in the Custom Fields table.

2. In the Add/Edit Custom Fields window, enter the custom field's name and a description of the custom field in **Field Caption** field.

8.8 Configuring a WebCenter Content Imaging Direct Commit Profile

Use the WebCenter Content Imaging Commit Driver to commit documents from Capture to WebCenter Content Imaging using one of these methods:

■ **Direct Commit**, where Capture connects to a WebCenter Content Imaging instance and commits documents directly into it, as described in this section.

■ **Input Agent Commit**, where Capture creates input files from Capture batches, which are then uploaded in bulk to WebCenter Content Imaging by its Input Agent service. See Section 8.9.

Note: To support multiple configurations, create and activate multiple WebCenter Content Imaging commit profiles. For example, you might create a profile to commit documents directly and another to commit them via Input Agent.

This section covers the following topics:

■ Section 8.8.1, "About Direct Committing"

■ Section 8.8.2, "Searching For and Appending to WebCenter Content Imaging Documents"

■ Section 8.8.3, "Configuring Direct Commit Settings"

8.8.1 About Direct Committing

With a direct commit profile, Capture logs into WebCenter Content Imaging and commits documents directly using WebCenter Content Imaging's web services. Creating this type of WebCenter Content Imaging commit profile involves the

following configuration. Detailed steps are provided in Section 8.8.3.

1. Create a commit profile and select WebCenter Content Imaging as the commit driver.

2. Enter login information for the WebCenter Content Imaging commit driver to automatically connect to the WebCenter Content Imaging system.

> **Note:** Each time you commit using a WebCenter Content Imaging direct commit profile, Capture connects to the specified WebCenter Content Imaging instance, then logs out after the commit is complete.

3. Specify direct commit as the commit method.

4. Map Capture metadata fields to WebCenter Content Imaging application metadata fields.

> **Note:** To successfully commit documents, the data types of mapped Capture metadata fields and WebCenter Content Imaging application fields must match. If the commit driver detects a problem, such as incompatible fields, it logs a message and stops the commit process.

5. Optionally, set the commit driver to search for existing WebCenter Content Imaging documents and append to them, if found. To search for matches, you select a search definition created in WebCenter Content Imaging.

Figure 8–5 WebCenter Content Imaging Commit Driver Settings (Direct Commit)

8.8.2 Searching For and Appending to WebCenter Content Imaging Documents

You can set the commit profile to search for a matching document during direct commits. When searching, Capture compares metadata values for the document being committed to search parameters specified in the selected WebCenter Content Imaging search definition. For more information about creating WebCenter Content Imaging search definitions, see *Oracle Fusion Middleware Administering Oracle WebCenter Content: Imaging*.

When searching and appending:

- If Capture finds a match to an existing document, it appends the new document to the matched document.

- If Capture does not find a match, a new document is created.

- If Capture finds multiple matching documents, the document commit stops.

Important Points About Searching and Appending

- The Searching and appending option is available for documents output in multiple page TIFF format only. (On the commit profile's **General Settings** train stop, the **Document Output Format** field must be set to **TIFF Multi-Page**).

- Because the performance of searches affects the performance of the commit process, searches should be carefully defined and tuned.

- The WebCenter Content Imaging search definition is integral to matching, and must reflect client profile settings in the workspace. For example, if a client profile contains five metadata fields but the search definition contains three fields only, searches are less specific, and documents considered separate documents in Capture could be appended to in WebCenter Content Imaging. In addition, the search definition must use AND conditions, not OR conditions.

- Depending on the database used for the WebCenter Content Imaging server, the search may be case sensitive, meaning that if metadata values are identical but their case differs, no matching occurs.

8.8.3 Configuring Direct Commit Settings

Follow these steps to configure a commit profile that writes documents from Capture to WebCenter Content Imaging.

1. In a selected workspace, add or edit a commit profile. See Section 8.2.

2. On the **General Settings** train stop, select **WebCenter Content Imaging** in the **Commit driver** field.

3. In the **Document Output Format** field, select **TIFF Multi-Page**.

4. On the **Commit Driver Settings** train stop, log in to the WebCenter Content Imaging instance by specifying the **User ID**, **Password**, **Security Policy**, and **Imaging WebService URL** fields and click **Connect**. This user must have permission to check documents into WebCenter Content Imaging. The format of the **Imaging WebService URL** is:

   ```
   http://hostname:port/imaging/ws
   ```

   Upon successful connection, Capture displays the connection status as *Connected*.

> **Note:** Each time users commit using the profile, Capture uses this login information to connect to WebCenter Content Imaging using the URL specified.

5. On the **General** tab, leave the **Direct Commit** field selected as the commit method.

6. On the **Field Mappings** tab, select the WebCenter Content Imaging application to commit to, and map Capture fields to WebCenter Content Imaging fields. Make sure that the data type of mapped fields match. Select an Imaging field and click the **Edit** button, then select the Capture field to map to. Repeat to map additional fields.

7. On the **Advanced** tab, specify options for searching and appending. See Section 8.8.2.

   Searching requires a previously created search definition in WebCenter Content Imaging administration that specifies how documents are matched. If you select the **Search and Append to Matching Imaging Documents** field, select a definition in the **Search Definition** field.

8.9 Configuring a WebCenter Content Imaging Input Agent Commit Profile

Use the WebCenter Content Imaging commit driver to commit documents from Capture to WebCenter Content Imaging using one of these methods:

- **Direct Commit**, where Capture connects to a WebCenter Content Imaging instance and commits documents directly into it. See Section 8.8.

- **Input Agent Commit**, where Capture creates input files from Capture batches, which are then uploaded in bulk to WebCenter Content Imaging by its Input Agent service, as described in this section.

  > **Note:** To support multiple configurations, create and activate multiple WebCenter Content Imaging commit profiles. For example, you might create a profile to commit documents directly and another to commit them via Input Agent.

This section covers the following topics:

- Section 8.9.1, "About Input Agent Committing"
- Section 8.9.2, "Configuring Input Agent Settings"

8.9.1 About Input Agent Committing

During an Input Agent commit, Capture writes a delimited input file for the batch, along with its images, to a specified *Capture output directory*. The input file lists document images along with their associated metadata values for bulk uploading into WebCenter Content Imaging. The WebCenter Content Imaging Input Agent service monitors a specified *Input Agent input directory* and upon finding input files that match its input mask, uploads the files' referenced documents in bulk into WebCenter Content Imaging.

Creating this type of WebCenter Content Imaging commit profile involves the following configuration. Detailed steps are provided in Section 8.9.2.

1. Create a commit profile and select WebCenter Content Imaging as the commit driver.

2. Enter login information for the WebCenter Content Imaging commit driver to connect to the WebCenter Content Imaging system for field mapping definition.

3. Select Input Agent Commit as the commit method. Then specify the Capture output directory to which Capture writes input files and images upon commit. In addition, you also specify the Input Agent input directory from which the WebCenter Content Imaging Input Agent uploads documents.

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

4. Map Capture metadata fields to a selected WebCenter Content Imaging input definition.

   > **Note:** When committing documents indirectly using input files, Capture metadata fields and WebCenter Content Imaging application field names do not have to match. However, you must ensure that your input file definitions are correct so they correspond to the input files generated by Capture.

8.9.1.1 About Input Definitions

Configuring an Input Agent commit requires an *input definition* created in WebCenter Content Imaging's Manage Inputs area. For information, see *Oracle Fusion Middleware Administering Oracle WebCenter Content: Imaging*.

Creating an input definition in WebCenter Content Imaging includes these steps:

1. Upload a sample file that specifies how input files from Capture are composed. The sample file also specifies how input files are named, as described in Section 8.9.1.2.

2. Specify the Imaging application to input documents and their metadata values.

3. Based on the sample file, define an input mask that the Input Agent uses to locate files for input. For example, if you specify a mask of *ServiceReportsInput*.txt*, the Input Agent finds and processes input files that begin with that name.

4. Define a delimiter that specifies the character by which values in the input text file are separated. For example, enter a pipe (|) character.

8.9.1.2 How Capture Names Input Files Upon Commit

Capture names input files it creates upon commit based on the file attributes defined in the corresponding WebCenter Content Imaging input definition.

8.9.2 Configuring Input Agent Settings

Follow these steps to configure a commit profile that writes input files from Capture to WebCenter Content Imaging for processing by a WebCenter Content Imaging Input Agent. Also see Section 8.9.1.

> **Note:** A WebCenter Content Imaging input definition is required for configuring an Input Agent commit. For more information, see *Oracle Fusion Middleware Administering Oracle WebCenter Content: Imaging*.

Figure 8–6 WebCenter Content Imaging Commit Driver Settings (Input Agent Commit)

1. In a selected workspace, add or edit a commit profile. See Section 8.2.

2. On the **General Settings** train stop, select **WebCenter Content Imaging** in the **Commit Driver** field.

3. On the **Login** tab of the **Commit Driver Settings** train stop, log in to the WebCenter Content Imaging instance by specifying the **User ID**, **Password**, **Security Policy**, and **Imaging WebService URL** fields and clicking **Connect**. The format of the **Imaging WebService URL** is:

   ```
   http://hostname:port/imaging/ws
   ```

   Upon successful connection, Capture displays the connection status as **Connected**.

   > **Note:** Each time users commit using the profile, Capture uses this login information to connect to WebCenter Content Imaging using the URL specified.

4. On the **General** tab, select **Input Agent Commit** as the commit method.

5. In the **Input Agent Directory** field, select a directory configured for the selected WebCenter Content Imaging instance.

6. In the **Capture Output Directory** field, specify the directory to write the input files and images. Use a fully qualified folder path relative to the Capture server's operating system.

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

7. In the **Imaging Input Definition** field on the **Field Mappings** tab, select the input definition to use to generate input files.

8. Map Capture fields to Imaging fields. Make sure that the data type of mapped fields match. Select an Imaging field and click the **Edit** button, then select the Capture field to map to. Repeat to map additional fields.

8.10 Configuring an Oracle Documents Cloud Service Commit Profile

This section covers the following topics:

- Section 8.10.1, "About the Oracle Documents Cloud Service Commit Driver"
- Section 8.10.2, "Configuring Oracle Documents Cloud Service Commit Driver Settings"

8.10.1 About the Oracle Documents Cloud Service Commit Driver

Use the Oracle Documents Cloud Service Commit Driver to commit documents from Capture to Oracle Documents Cloud Service (DOCS). For more information about DOCS, see *Oracle Cloud Administering Oracle Documents Cloud Service* in the Oracle Cloud documentation set.

Configuring the driver settings involves the following main steps. Detailed steps are provided in Section 8.10.2.

1. Create a commit profile and select Oracle Documents Cloud Service as the commit driver.

2. Connect to the DOCS instance after entering login information.

3. Specify where to check-in the documents into DOCS and how to name them.

8.10.2 Configuring Oracle Documents Cloud Service Commit Driver Settings

To configure Oracle Documents Cloud Service commit driver settings:

1. In a selected workspace, create a commit profile. See Section 8.2.

2. On the **General Settings** train stop, select **Oracle Documents Cloud Service** in the **Commit Driver** field.

3. Select the **Commit Driver Settings** train stop.

   Because you selected **Oracle Documents Cloud Service** as the commit driver, this train stop displays settings specific to Oracle Documents Cloud Service commits.

4. On the **Login** tab, enter a user name, password, and server URL to log in to the DOCS server instance during document commits.

Click **Login**. Upon successful login, the status changes to **Connected**, and the remaining tabs become available.

5. 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** window. In the **Select Parent Folder** window, 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 DOCS 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. The order of the fields determines the subfolder creation order.

   In the **If folder name consists of invalid characters** field, specify how 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 DOCS, detection of existing folder names is case insensitive.

   – If a metadata field value used to create a subfolder is blank, and there are subsequent non-blank subfolders, the document commit is aborted with the error message indicating that the subfolder path is invalid.

   – If a metadata field value used to create 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.

6. On the **Document File Naming** tab, specify how to name the document files.

   ■ 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 document file based on one or more selected metadata field values. If this field is not selected, Capture names the document 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 selected fields. 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 (a space is the default).

   ■ In the **If File Name Consists of Invalid Characters** field, specify how Capture should handle any invalid characters found in document file names by selecting either **Remove invalid characters** option or **Cancel document commit** option.

8.11 Configuring PDF Searchable Document Output

If you specified a document output format of **PDF Searchable** on the **General Settings** train stop, complete fields on the **Document Output Settings** train stop to configure additional settings related to this document format.

Figure 8–7 PDF Searchable Document Output Settings

1. In a selected workspace, add or edit a commit profile. See Section 8.2.

2. Complete settings on the **Document Output Settings** train stop.

    a. In the **Optical Character Recognition** settings:

        – Select the languages to use for the PDF Searchable output. The English language is selected by default.

        > **Note:**   In case Asian languages are selected for OCR, English is also recognized by default without having to specify it explicitly.

The following table lists the available languages:

Name	Alternate Name	Alphabet Classification
English		Latin
German		Latin
French		Latin
Dutch		Latin
Norwegian		Latin
Swedish		Latin
Finnish		Latin
Danish		Latin
Icelandic		Latin
Portuguese		Latin
Spanish		Latin
Catalan	Catalonian	Latin
Galician	Gallegan	Latin
Italian		Latin
Maltese		Latin
Greek		Greek
Polish		Latin
Czech		Latin
Slovak		Latin
Hungarian		Latin
Slovenian		Latin
Croatian		Latin
Romanian	Rumanian	Latin
Albanian		Latin
Turkish		Latin
Estonian		Latin
Latvian		Latin
Lithuanian		Latin
Esperanto		Latin
Serbian(Latin)	Bosnian	Latin
Serbian		Cyrillic
Macedonian		Cyrillic
Moldavian		Cyrillic
Bulgarian		Cyrillic
Byelorussian	Belarusian, Belarusan	Cyrillic
Ukrainian		Cyrillic

Name	Alternate Name	Alphabet Classification
Russian		Cyrillic
Chechen		Cyrillic
Kabardian		Cyrillic
Afrikaans		Latin
Aymara		Latin
Basque		Latin
Bemba	Ichibemba	Latin
Blackfoot	Siksika	Latin
Breton		Latin
Brazilian		Latin
Bugotu	Bughotu	Latin
Chamorro		Latin
Tswana(Chuana)	Chuana, Setswana	Latin
Corsican		Latin
Crow		Latin
Eskimo	Inuit	Latin
Faroese		Latin
Fijian		Latin
Frisian		Latin
Friulian		Latin
Gaelic(Irish)	Irish	Latin
Gaelic(Scottish)	Scottish	Latin
Ganda(Luganda)	Luganda	Latin
Guarani		Latin
Hani		Latin
Hawaiian		Latin
Ido		Latin
Indonesian		Latin
Interlingua		Latin
Kasub	Kashubian	Latin
Kawa	Wa, Blang	Latin
Kikuyu	Gikuyu	Latin
Kongo		Latin
Kpelle		Latin
Kurdish		Latin
Latin		Latin
Luba		Latin
Luxembourgian	Letzeburgesch, Luxembourgeois	Latin

Name	Alternate Name	Alphabet Classification
Malagasy		Latin
Malay		Latin
Malinke	Maninkakan	Latin
Maori		Latin
Mayan		Latin
Miao	Hmong	Latin
Minankabaw	Minangkabau	Latin
Mohawk		Latin
Nahuatl		Latin
Nyanja	Chewa, Chichewa	Latin
Occidental		Latin
Ojibway	Ojibwa	Latin
Papiamento		Latin
PidginEnglish	Tok Pisin	Latin
Provencal	Occitan	Latin
Quechua		Latin
Rhaetic	Romansh	Latin
Romany		Latin
Ruanda	Rwanda, Kinyarwanda	Latin
Rundi		Latin
Samoan		Latin
Sardinian		Latin
Shona		Latin
Sioux	Dakota	Latin
Sami		Latin
Sami(Lule)	Lule Sami	Latin
Sami(Northern)	Northern Sami	Latin
Sami(Southern)	Southern Sami	Latin
Somali		Latin
Sotho	Sesotho, Sutu	Latin
Sundanese		Latin
Swahili	Kiswahili	Latin
Swazi	Swati	Latin
Tagalog	Filipino	Latin
Tahitian		Latin
Tinpo		Latin
Tongan		Latin
Tun	Tunia	Latin

Name	Alternate Name	Alphabet Classification
Visayan	Cebuano	Latin
Welsh		Latin
Sorbian(Wend)	Wend	Latin
Wolof		Latin
Xhosa		Latin
Zapotec		Latin
Zulu		Latin
Japanese		Asian
Chinese(S)	Simplified Chinese	Asian
Chinese(T)	Traditional Chinese	Asian
Korean		Asian

– Optionally, to optimize OCR recognition for financial, medical and legal documents, from the list of available professional dictionaries, select the ones that you want to use in the PDF Searchable output.

Note: Although the Asian languages support English recognition, the professional dictionaries are not used when an Asian language is selected for OCR.

– Select the **Single Language Detection per Page** field to detect the predominant language on a page in the document. This option is particularly useful when the language for a page is unknown. This field is unchecked by default.

Notes: The **Single Language Detection per Page** field is enabled only when multiple languages are selected.

When this field is not selected, it is recommended to use fewer than five languages to improve recognition accuracy.

A configuration error message may be displayed in the following cases:

■ If you deselect this field when multiple Asian languages are selected for OCR.

■ If you select this field when an unsupported language (for example, Greek) has been selected for recognition.

■ If you select an unsupported language for OCR when this field is selected.

b. In the **Advanced PDF Settings**:

– Select the **Color Image Quality** for color images. You can choose: Minimum (minimum size), Good (medium size), or Best (maximum size).

- In the **Compatibility** field, select the PDF version of the searchable PDF document. You can choose: PDF 1.4, PDF 1.5, PDF 1.6, PDF 1.7, PDF A/1b, PDF A/2b, or PDF A/2u.

- Select the **Create Linear PDF for efficient Web Viewing** field to create a linear PDF document. This option is enabled only when you select PDF 1.4, PDF 1.5, PDF 1.6, or PDF 1.7 in the **Compatibility** field. Linear PDFs are documents that have been organized in a special way to enable efficient incremental access in a network environment. This field is unchecked by default.

- Select the **Preserve original image orientation** field to prevent the automatic reorientation of the image. This field is unchecked by default.

c. In the **Text File Options** settings:

- Select the **Create Text File** field to create a text file along with the PDF Searchable output file that contains all text captured during the OCR process.

- In the **Text File Code Page** field, search for and select the character set to use for the OCR text file. The default value is UTF-8. The following table lists the available character sets:

Code Page Name	Description
Big5	Traditional Chinese (support Eten extension and HKscs non-standard mode)
Code Page 437	DOS Latin US
Code Page 850	DOS Latin 1
Code Page 852	DOS Latin 2
Code Page 860	DOS Portuguese
Code Page 863	DOS French-Canadian
Code Page 865	DOS Nordic
Code Page 866	DOS Cyrillic CIS
CWI Magyar	DOS Hungarian
EUC-CN	Simplified Chinese
EUC-JP	Japanese
EUC-TW	Traditional Chinese
GB 18030	Simplified Chinese
GBK	Simplified Chinese
Greek-ELOT	DOS Greek
Greek-MEMOTEK	DOS Greek
HKSCS-2004	Traditional Chinese (HKscs standard mode, supports Eten extension)
Icelandic	DOS Icelandic
IVKAM C-S	Czech & Slovak
Latin 1	ISO 8859-1
Mac Central EU	PT 202

Code Page Name	Description
Mac INSO Latin 2	MAC CE
Mac Primus CE u	MAC CE
Macintosh	Mac Western
Magyar Ventura	DOS Hungarian
Maltese	Malta; 7 bits used
Mazowia Polish	DOS Polish
OCR	Non Standard Win
Roman 8	For HP printers
Shift_JIS	Japanese
Sloven & Croat	7 bits used
Turkish	DOS Turkish
UHC	Korean (extended EUC-KR)
Unicode	Multilingual
UTF-8	Multilingual
Windows ANSI	Code Page 1252
Windows Baltic	Code Page 1257
Windows Cyrillic	Code Page 1251
Windows Eastern	Code Page 1250
Windows Esperant	Non Standard Win
Windows Greek	Code Page 1253
Windows Sami	Sami
Windows Turkish	Code Page 1254
WordPerfect	Multilingual
WordPerfect Old	Multilingual

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

8.12 Configuring 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 Section 8.1.4. You do this by setting the Commit Processor as the post-processing step in a client profile or other processor job. To configure batch flow from:

- A client profile, see Section 4.17.

- An Import Processor job, see Section 5.10.

- A Document Conversion Processor job, see Section 6.6.

- A Recognition Processor job, see Section 7.2.4.

9

Use Case: Processing Employee Expenses

This chapter describes how to configure an expense processing use case in which expense reports with bar codes are scanned or imported into Capture, indexed, and committed for storage and workflow processing.

Executive Summary

Use Case	The organization lacked an efficient method of receiving, capturing, and categorizing expense reports for sending on to approval workflow. Expenses were received in multiple ways, typically in paper form or emailed in various file formats. The substantial time the staff spent manually processing expenses resulted in high costs and payment delays.
Solution	Configure a Capture workspace that provides automated and manual processing paths for scanning and importing expenses, reading their bar codes, and committing them for further processing.
Components	The system components used to support this use case include: ■ Capture Client ■ Capture Recognition Processor ■ Capture Document Conversion Processor ■ Capture Import Processor ■ Capture Commit Processor ■ WebCenter Content: Imaging ■ Business and workflow applications (for example, Oracle E-Business Suite and Oracle Business Process Management)
Required Documentation	To complete this use case, see the following documentation resources: ■ This guide, *Oracle Fusion Middleware Managing Oracle WebCenter Enterprise Capture* ■ *Oracle Fusion Middleware Using Oracle WebCenter Enterprise Capture* ■ *Oracle Fusion Middleware Administering Oracle WebCenter Content: Imaging*

This chapter contains the following sections:

■ Introduction to the Use Case

■ Implementing the Use Case

9.1 Introduction to the Use Case

This use case illustrates configuring a Capture workspace for automated and manual capture, document conversion, bar code recognition, and commit of expense reports, as shown in Figure 9–1.

▶ See video

Assumptions

The use case makes several assumptions:

1. Employees initiate the process by creating an expense report, typically as part of a business application workflow. Creating an expense report automatically initiates the following processes:

    a. Generates a cover sheet containing a bar code that identifies the expense report number.

    b. Writes a database record that references the employee expense report number and links it to key employee values, such as name and employee ID.

2. Employees print the bar coded cover sheet, attach applicable expense receipts to it, and submit it.

    a. For automated processing, employees scan their expenses cover sheet and receipts using a multi-function device, which sends them to a specified email account or network folder.

    b. In cases where employees are unable to scan their reports, staffs receive them in paper format, and manually scan and index them.

Figure 9–1   Expenses Use Case Process
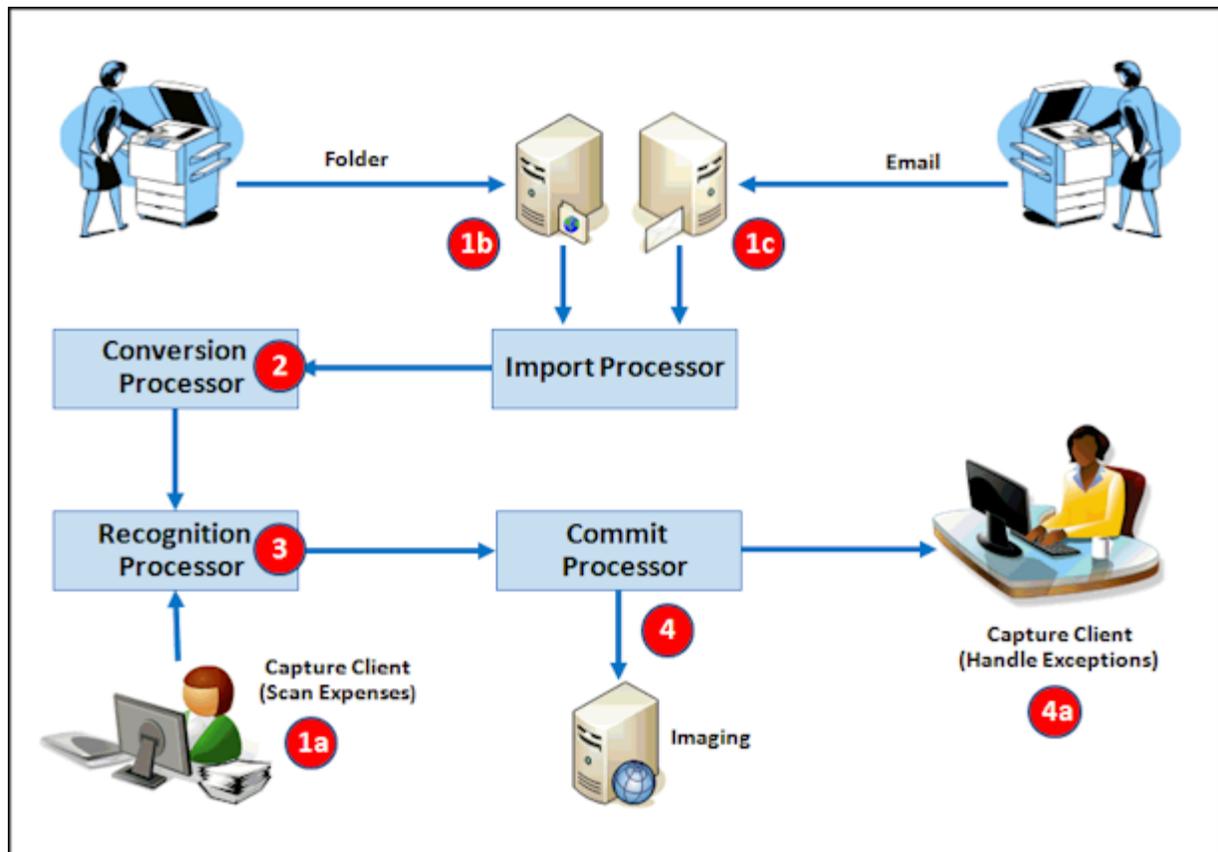
Expense Process in Capture Workspace

1. Expense reports enter a Capture workspace through one of several manual or automated paths (numbers below correspond to highlighted numbers in Figure 9–1):

    a. **Capture Client:** Using a client profile, an employee scans or imports expense reports. Because scanning in the client always creates image documents and the client can convert imported ones, these batches go directly to recognition (bar code) processing.

    b. **Folder:** Employees scan their expense reports on multi-function devices (MFDs), saving them to a network folder. A folder-type **Import Processor job** imports them, then sends the batch to the Document Conversion Processor. If the MFD created PDF files instead of TIFF files during scanning, the Document Conversion Processor job will convert the PDF files to image format, which is needed for recognition processing.

    c. **Email:** Employees scan their expense reports on MFDs. The MFD creates a PDF document, attaches it to an email message and sends the email to an expenses inbox monitored by the Import Processor. An email-type **Import Processor job** imports the message's attachments, then sends the batch to the Document Conversion Processor to convert the PDFs to image format for recognition processing.

2. A **Document Conversion Processor job** converts any non-image documents to image documents, merges them to a single document required for recognition processing, and sends the batch to the Recognition Processor. Employees may scan

one or multiple expense reports that may exist in the email as an attachment per expense report or as one attachment with multiple expense reports. So, the Document Conversion processor is configured to collapse all pages into a single image document to allow the Recognition Processor to organize the documents based on the detection of the expense report number bar code.

3. A **Recognition Processor job** organizes the batch into individual expense documents based on expense cover sheets it detects. It then assigns the bar code's value (in this case, an expense report number) to a required Capture metadata field, and that value is used to look up and populate remaining metadata fields.

4. The **Commit Processor** commits the indexed expense reports to Imaging for approval and processing.

   a. A client user handles any expense report exceptions that fail commit, such as those that encountered bar code recognition issues.

9.2 Implementing the Use Case

This section describes how to configure Capture for the expense processing use case.

Part I: Configuring Manual Expense Processing

- Task 1: Use Case Prerequisites
- Task 2: Create an Expenses Workspace and Elements
- Task 3: Configure a Database Lookup to Populate Capture Fields
- Task 4: Configure Client Scanning of Expenses
- Task 5: Configure Commit Processing
- Task 6: Verify Manual Processing

Part II: Configuring Automated Expense Processing

- Task 7: Configure Document Conversion Processing
- Task 8: Configure Recognition Processing
- Task 9: Configure Folder Import Processing
- Task 10: Configure Email Import Processing
- Task 11: Configure Exception Handling

9.2.1 Task 1: Use Case Prerequisites

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

- TIFF or PDF files.

  – TIFF image files, preferably multiple page, with a cover sheet containing a bar code. For example, you might use expense reports with a Code 128 bar code on each report's cover sheet.

  – PDF files, also multiple page, with a bar code on their cover sheets.

- A JDBC database connection for configuring a database lookup, as described in Section 9.2.3. The lookup will search the database for an expense report number and return employee information.

- A location from which to import expense reports, as described in Section 9.2.9. For example, this might be a shared folder on your network, such as `\\FileServer\Expenses\Import`.

- An email account from which to import expense report emails and attachments, as described in Section 9.2.10.

- A WebCenter Content: Imaging instance to which to commit processed expense documents, as described in Section 9.2.5.1. To test the configuration when no Imaging instance is available, you can configure a text file commit to a shared network folder such as `\\FileServer\Expenses\Commit`, as described in Section 9.2.5.2.

9.2.2 Task 2: Create an Expenses Workspace and Elements

Begin by creating the structure and building blocks for the expenses use case. In the workspace you create, you will add the following elements:

- Metadata fields to contain expense document values

- A document profile that identifies the expense document metadata fields

- A database lookup to populate metadata fields

- A client profile for manually scanning or importing expense reports. This client profile also allows you to test your workspace settings. The importing option is useful when you do not have a scanner available.

To create a workspace and elements:

1. In the Capture workspaces pane, add a workspace (for example, **Expenses**). Select the new workspace.

2. On the **Metadata** tab, add metadata fields such as the following:

   - Expense Report Number (Alpha Numeric, Required)

   - Employee First Name (Alpha Numeric)

   - Employee Last Name (Alpha Numeric)

   - Employee ID (Alpha Numeric)

Figure 9–2   Creating Metadata Fields in the New Workspace

Workspace: Expenses

| Security | **Metadata** | Classification | Capture | Processing | Commit | Advanced |

Metadata Fields   + / ✖

Name	Field Type	Max Length	Required	Locked	Display Format	Input Mask	Auto Populate
Employee First Name	Alpha Numeric	0	No	No			(none)
Employee ID	Alpha Numeric	0	No	No			(none)
Employee Last Name	Alpha Numeric	0	No	No			(none)
Expense Report Number	Alpha Numeric	0	Yes	No			(none)

3.   On the **Classification** tab, create a document profile (for example, `Expense Documents`). Add the metadata fields and order them so they display in the client as follows:

   a.   Expense Report Number

   b.   Employee First Name

   c.   Employee Last Name

   d.   Employee ID

Figure 9–3   Creating a Document Profile

Workspace: Expenses

Document Profile: Expense Documents   [Cancel] [Submit]

* Name: Expense Documents

Description:

* Metadata Fields: **Available Metadata Fields**   **Selected Metadata Fields**

> Move
>> Move All
< Remove
<< Remove All

Selected Metadata Fields:
- Expense Report Number
- Employee First Name
- Employee Last Name
- Employee ID

9.2.3 Task 3: Configure a Database Lookup to Populate Capture Fields

In this section, configure a lookup that searches a database for an expense report number and returns the associated employee's ID and full name from the expenses record.

1. In the **Metadata** tab, click the **Add** button in the Database Lookup Profiles table.

2. Select settings on the **General Settings** train stop of the Database Lookup screen.

   a. In the **Database Lookup Name** field, enter a name such as `Employee Lookup`.

   b. In the **JNDI Name** field, enter a database connection (for example, `jdbc/lob`). Click **Connect**. If successful, **Status** changes to Connected: *connection name*.

3. On the **Search Fields** train stop, configure the lookup to search on the expense report number field.

   a. Click the **Add** button in the Search Field Definitions table.

   b. In the Search Field Settings window, select **Expense Report Number** as the **Capture Field** to search.

   c. Select the **Schema**, **Table**, and **Database Field** to search. (For this exercise, you can use nearly any data for example purposes.) Click **OK**.

4. On the **Return Fields** train stop, configure the lookup to return database values based on the search results.

   Notice that Expense Report Number is automatically selected in the **Search Field** option in the Return Field Definitions table's heading.

   a. Click the **Add** button.

   b. In the Return Field Settings window, select **Employee ID** as the **Capture Field** to be populated. Select the **Database Field** (from the previously selected schema and table) from which to return a value. Click **OK**.

   c. Add another return field, selecting **Employee First Name** as the **Capture Field** to be populated and the database field whose value will populate the Capture field. Repeat to add a final return field for the **Employee Last Name** Capture field.

   d. If needed, use the up/down arrow buttons to reorder the return fields as shown in Figure 9–4. The fields will be listed in this order left to right in client lookup results.

Figure 9–4   Configuring Database Lookup Return Fields for a Selected Search Field

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

9.2.4 Task 4: Configure Client Scanning of Expenses

Configure a client profile that client users can use to manually scan or import expense documents.

1. On the **Capture** tab, click the **Add** button in the Client Profiles table.

2. Configure settings on the **General Settings** train stop.

    a. In the **Profile Type** field, choose **2 - Capture and Index**.

    b. In the **Profile Name** field, enter a name such as `Scan Expenses`.

    c. In the **Batch Prefix** field, enter a prefix such as `SCANEXP`.

3. Configure settings on the **Image Settings** train stop.

    a. In the **Default DPI** field, select **300**.

    b. In the **Non-Image File Import Action** field, select **Convert to Image Format**. This will allow you to import PDF (non-image) files and Capture will convert them within the Client without requiring the use of the Document Conversion Processor.

    c. In the **DPI** field under **Non-Image Conversion** options, select **300**.

4. Complete settings on the **Document Indexing Settings** train stop.

    a. In the **Document Creation Option** field, select **3 - Variable Number of Pages**.

    b. In the **Database Lookup Profile** field, select the database lookup you created in Section 9.2.3 (for example, **Employee Lookup**).

    c. In the **Document Profiles** field, select the profile you created (for example, **Expense Documents**).

Figure 9–5   Configuring a Client Profile for Capturing Expense Documents

5. On the **Security** train stop, assign yourself to the client profile.

6. On the **Post Processing** train stop, select **Commit Processor** in the **Batch Processor** field. **Note**: Initially, we will test document committing. Later, we will change the client profile to release batches to the Recognition Processor.

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

9.2.5 Task 5: Configure Commit Processing

In this section, you configure commit processing. In a typical expenses scenario, expenses would be committed to Imaging for workflow processing. But for verification purposes or if you do not have an Imaging system available, you may want to configure a text file commit profile instead. You can configure one or both of the following profiles:

- Configure Committing to Imaging

- Configure Committing to a Folder (for Testing)

9.2.5.1 Configure Committing to Imaging

1. On the **Commit** tab, click the **Add** button in the Commit Profiles table.

2. Complete settings on the **General Settings** train stop.

    a. In the **Commit Profile Name** field, enter a name (`Commit to Imaging`).

    b. In the **Commit Driver** field, select **WebCenter Content Imaging**.

    c. In the **Document Output Format** field, select **PDF Searchable**.

    d. In the **Restrict Commit to Document Profiles** field, select the Expense Documents profile.

Figure 9–6   Configuring a Commit Profile for Committing to Imaging

3. Complete settings on the **Commit Driver Settings** train stop. Note that these settings are specific to the Imaging commit driver you selected in step 2b.

   a. On the **Login** tab, enter a **User ID**, **Password**, and **Imaging WebService URL**. Click **Connect**. The URL uses the following format:

      http://*hostname:port*/imaging/ws

   b. On the **General** tab, select **Direct Commit**.

   c. On the **Field Mappings** tab, map Capture fields to fields in the selected Imaging application.

      Select an Imaging application to which to write metadata values in the **Imaging Application** field. In the table, select an Imaging field to map and click the **Edit** button. Select a Capture field to map its value to the selected Imaging field.

Figure 9–7   Configuring How Capture Metadata Values are Committed to Imaging Application Fields

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

9.2.5.2 Configure Committing to a Folder (for Testing)

Follow these steps to commit expense reports to a document folder for testing purposes.

1. On the **Commit** tab, click the **Add** button in the Commit Profiles table.

2. Complete settings on the **General Settings** train stop.

    a. In the **Commit Profile Name** field, enter a name (`Commit to Text`).

    b. In the **Commit Driver** field, select **Text File**.

    c. In the **Document Output Format** field, select **TIFF Multi-Page**.

    d. In the **Restrict Commit to Document Profiles** field, select the Expense Documents profile.

Figure 9–8 Configuring a Commit Profile for Committing Documents to a Network Folder

3. Complete settings on the **Commit Driver Settings** train stop. Note that these settings are specific to the commit text driver you selected in step 2b.

   a. In the **Commit Text File Folder** field, enter a location to write commit text files. This will enable you to view one or more text files after commit and verify the expense report number and the database lookup return fields.

   Either specify a folder on the Capture server or a network path accessible from the Capture server. For this example, you might specify a shared folder on your system. If the Capture server is running on Windows, you might specify a UNC path to a network share, such as \\FileServer\Expenses\Commit.

   In the **File Prefix** field, enter **TEXT_FILE**.

   In the **File Extension** field, enter **txt**.

   b. On the **Document Folder** tab, enter a location in the **Document Folder** field to write the expense files. For testing purposes, this might be a shared folder on your network, such as \\FileServer\Expenses\Import.

   Select the **Create a folder per committed batch** field.

   c. On the **Document File Naming** tab, complete settings.

   Select the **Name document file based on metadata field values** field, then move Expense Report Number to the Selected Fields list.

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

9.2.6 Task 6: Verify Manual Processing

In this section, verify the settings and profiles you configured.

1. Start the Capture Client.

   Note that each time you make changes to a client profile in the workspace console, you need to sign out and back in to the Capture Client to see the changes reflected.

2. Select the client profile you created (for example, Scan Expenses) in the **Client Profile** field in the upper left of the client window.

3. Capture one or more expense reports.

   ■ If *scanning* expenses, the client will create one document per batch, because you chose the **Variable Number of Pages** option but did not insert blank separator sheets between documents. (Document separation will occur later.)

   ■ If *importing* expenses, select the **Create one document per import file** option when prompted and select one file only. 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 Section 9.2.4.

4. Expand the new batch. Select the document and organize it into separate expense documents.

   If you scanned multiple expenses, you must manually organize the single document into multiple expense documents. (In a later section, you will configure the Recognition Processor to automatically organize documents based on detected bar-coded cover sheets.)

   Use the down arrow key to proceed through the images until you reach the first page of a new expense document. Click the **Create New Document** button from the document toolbar. A new document separation appears in the thumbnail display.

Figure 9–9   As a Client User, Separating a Batch into Expense Documents
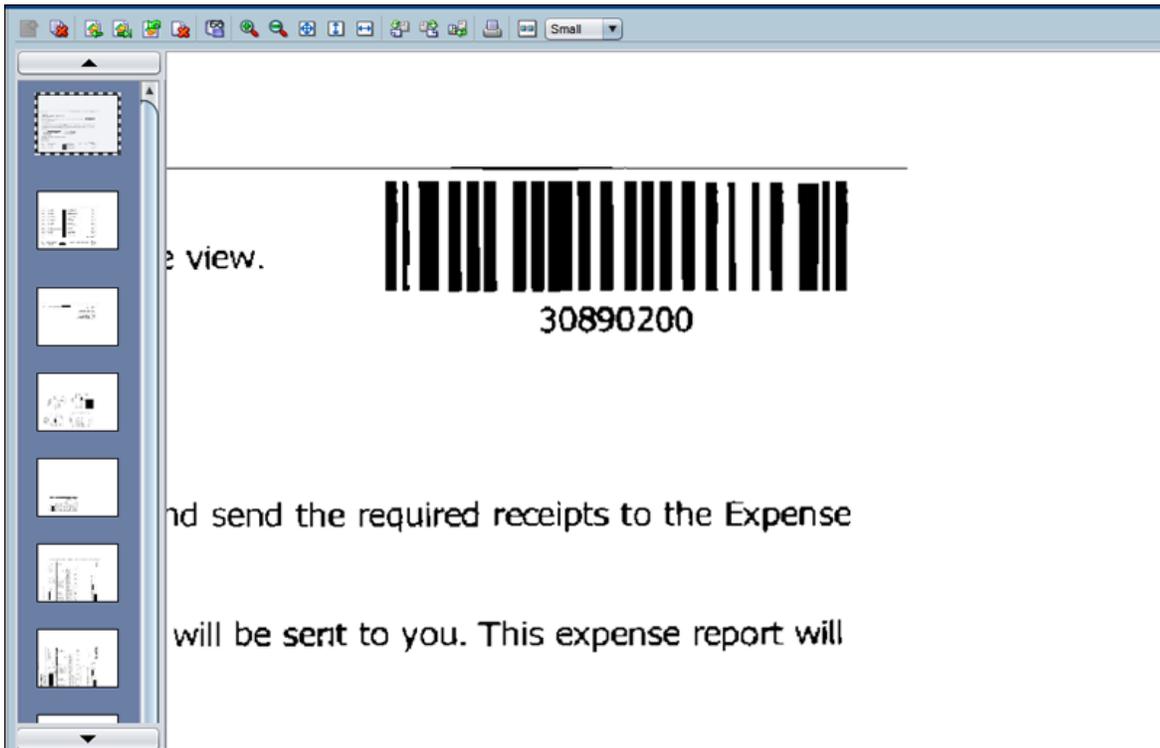

5. Use the database lookup to search by expense report number and return employee ID and name metadata values.

   The metadata pane displays in the lower left pane. The **Expense Report Number** field name is prefaced with an asterisk to indicate that it is required. To successfully commit a document, all required fields must contain a value. (In a

later section, the Recognition Processor will automatically read the bar code value and populate the fields.)

a. On a document's cover sheet, zoom in to view the expense report number.

Zoom in by left-clicking, dragging a rectangle around the area to zoom, and releasing.

Figure 9–10 As a Client User, Zooming In and Looking Up Values

b. In the metadata pane, click the **Expense Report Number** field.

The name of the selected field displays in blue. Because you configured the lookup to search using this field, the **Database Lookup** button becomes available on the document pane's toolbar.

c. Enter a value to search for (optional), then click the **Database Lookup** button.

In a typical scenario, the user would enter the expense report number, the lookup would find a matching value and then populate Capture metadata fields with the employee ID, first name, and last name values returned from the selected database record.

If you are testing the configuration, you can leave the field blank to return all values found. In that case, the Database Lookup Results window displays. Select a record in the window and the Capture metadata fields are populated with the employee ID, first name, and last name values returned from the selected database record.

Figure 9–11   As a Client User, Populating Metadata Fields Using the Database Lookup

6. Complete indexing the batch's documents.

    a. Create new documents as described in step 4.

    b. Index each document by performing a database lookup as described in step 5.

7. Click the **Release Batch** button to release the batch.

    Notice that a progress bar indicates the release status as the batch is synchronized with the Capture server. When clicking the **Refresh Batch List** button, the batch either disappears from the batch pane (indicating it was successfully committed) or remains with an error. For more information about errors, see Section 9.2.11.

8. Open the commit folder you specified in Section 9.2.5. View one or more text files and verify the expense report number and the database lookup return fields.

9.2.7 Task 7: Configure Document Conversion Processing

In this section, configure a Document Conversion Processor job to convert documents from PDF to TIFF format.

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

2. Complete settings on the **Document Selection** train stop.

    a. In the **Name** field, enter a name (for example, `Convert PDFs`).

    b. In the **Documents to Convert** field, choose **Selected non-image documents**. Enter `*.pdf` in the **File Name Filter** field.

Figure 9–12   Configuring the Import Processor to Convert PDF Files to TIFF Format

3. On the **Output Format** train stop, select **TIFF: black and white** in the **Output Image Format** field and **300** in the **DPI** field.

4. On the **Document Merge Options** train stop, select **Merge all documents** in the **Batch Merge Option** field. This will ensure that the batch will contain one document only, which is required for the recognition processing that will follow conversion.

5. Under the **When there is no system error** options on the **Post-Processing** train stop, select **Recognition Processor** in the **Batch Processor** field and select the **Expense Reports** job in the **Batch Processor Job** field. **Note**: Perform this step after creating the **Expense Reports** Recognition Processor job in Section 9.2.8 by editing the **Convert PDFs** job that you will create in this section.

6. Click **Submit** to save the Document Conversion Processor job.

7. Configure batches to flow from the client to the Document Conversion Processor job, and then to the Recognition Processor job.

    a. On the **Capture** tab, edit the **Scan Expenses** client profile you created in Section 9.2.4. On its **Image Settings** train stop, change the **Non-Image File Import Action** field to **Import in Native Format**.

    b. On its **Post-Processing** train stop, select **Document Conversion Processor** in the **Batch Processor** field, and select the **Convert PDFs** job in the **Batch Processor Job** field.

    c. Click **Submit** to save the client profile. When you release from the client, the batch will go to document conversion processing, then automatically to recognition processing.

8. Verify that the Document Conversion processor is converting non-image files and merging them into a single document.

a. On the **Processing** tab, in the Document Conversion Jobs table, edit the **Convert PDFs** job you created in this section. On its **Post-Processing** train stop, change the **Batch Processor** field to **None**.

b. Click **Submit** to save the Document Conversion Job.

c. Sign out of the client and back in.

d. Import several PDF expense documents with bar codes, selecting the **Create one document per import file** option.

e. Release the batch. The batch icon changes to a gear to indicate processing. Click the **Refresh Batch List** icon, multiple times if needed.

f. When the batch icon changes from processing to unlocked, expand the batch and see a single document.

9. Introduce the Recognition Processor and observe that the bar codes are being recognized and the batch is automatically separated into individual documents.

a. On the **Processing** tab, in the Document Conversion Jobs table, edit the **Convert PDFs** job you created in this section. On its **Post-Processing** train stop, change the **Batch Processor** field back to **Recognition Processor** and select the **Expense Reports** job in the **Batch Processor Job** field.

b. Sign out of the client and back in.

c. Release the batch. The batch icon changes to a gear to indicate processing. Click the **Refresh Batch List** icon, multiple times if needed.

d. When the batch icon changes from processing to unlocked, expand the batch and select a document. You can see that after document conversion, the Recognition Processor job separated the single document into individual documents and populated the **Expense Report Number** field.

## 9.2.8 Task 8: Configure Recognition Processing

Now that you can manually capture and index expense documents in the workspace, begin configuring automated processing by creating a Recognition Processor job in this section. The job will read expense report bar code values on the batch pages, organize the documents, and assign metadata values. To test the job, you will need documents with bar code values to capture.

1. On the **Processing** tab of Expenses workspace, click the **Add** button in the Recognition Processor Jobs table.

2. On the **General Settings** train stop, enter a name (for example, `Expense Reports`) in the **Recognition Job Name** field.

3. On the **Bar Code Recognition** train stop, select the symbology for the bar codes you will scan (for example, choose **Code 128** or equivalent).

4. Create a definition on the **Bar Code Definition** train stop. For example, the steps below create a definition that uses a mask validation rule to look for an 8 digit bar code.

a. Click the **Add** button in the Bar Code Definitions table.

b. In the Bar Code Definition window, enter a name such as `Expense Report #` in the **Name** field.

c. In the **Validation Rule** field, specify how to validate the bar code. For example, select **Mask** to create a mask validation definition. For more information about masks, see Section 3.4.3.

> **d.** Complete the validation-specific field or fields that display, then click **OK**. For example, for a mask definition, enter a mask in the **Mask** field that displays. You might enter a mask of 8 # signs to identify 8 digits:
>
> **########**

Figure 9–13   Expense Report Bar Code Definition
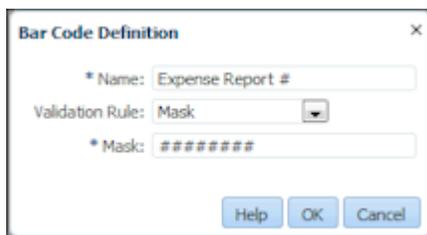
5. On the **Document Organization** train stop, leave the default **Separator pages** option selected.

In step 7, you will define the separator page. This will automate document organization for batches with bar coded separator sheets, as shown in Figure 9–1.

6. On the **Document Profile** train stop, select the Expense Documents profile you created in the **Default Document Profile** field.

Since all of the documents in a batch are expected to be expense reports and receipts, select the Expense Documents profile.

7. On the **Document Processing** train stop, configure an expense cover sheet separator page.

> **a.** Click the **Configure** button.
>
> **b.** On the Separator Page Definition screen, enter a name in the **Name** field (for example, **Expense Cover Sheet**).
>
> **c.** Click the **Add** button in the Rules table.
>
> **d.** In the Separator Page Rule window, enter a name (for example, **Expense Separator Rule**) in the **Rule Name** field.
>
> **e.** In the **Bar Code** field, select the bar code definition you created (Expense Report #). Click **OK**, then **Submit** to complete the separator page definition.

Figure 9–14   Configuring a Separator Page to Organize the Single Document Into Expense Documents

8. On the **Fields** train stop, configure the bar code value to populate the Expense Report Number metadata field.

    a. Select the Expense Report Number row in the Fields table and click the **Edit** button.

    b. In the Edit Recognition Job Field window, select **Bar Code** in the **Auto Populate With** field, and select **Expense Report #** in the **Bar Code** field. Click **OK**.

Figure 9–15   Configuring the Bar Code Value to Populate a Capture Metadata Field
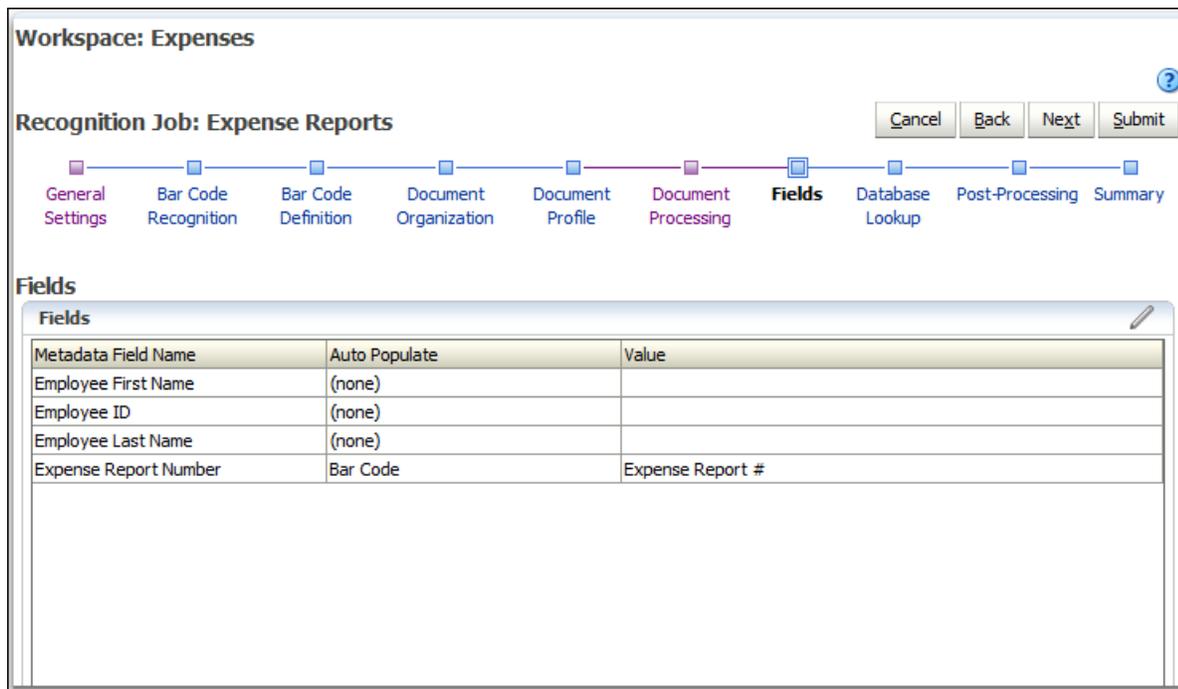
9. On the **Database Lookup** train stop, set a database lookup to populate the remaining metadata fields.

   a. In the **Using** field, select **Field Value**.

   b. In the **Field Name** field, select **Expense Report Number**.

   c. In the **Database Lookup Profile** field, select **Employee Lookup**.

   d. Select **Expense Report Number** as the **Database Search Field**.

Figure 9–16   Configuring the Database Lookup to Populate Capture Metadata Fields
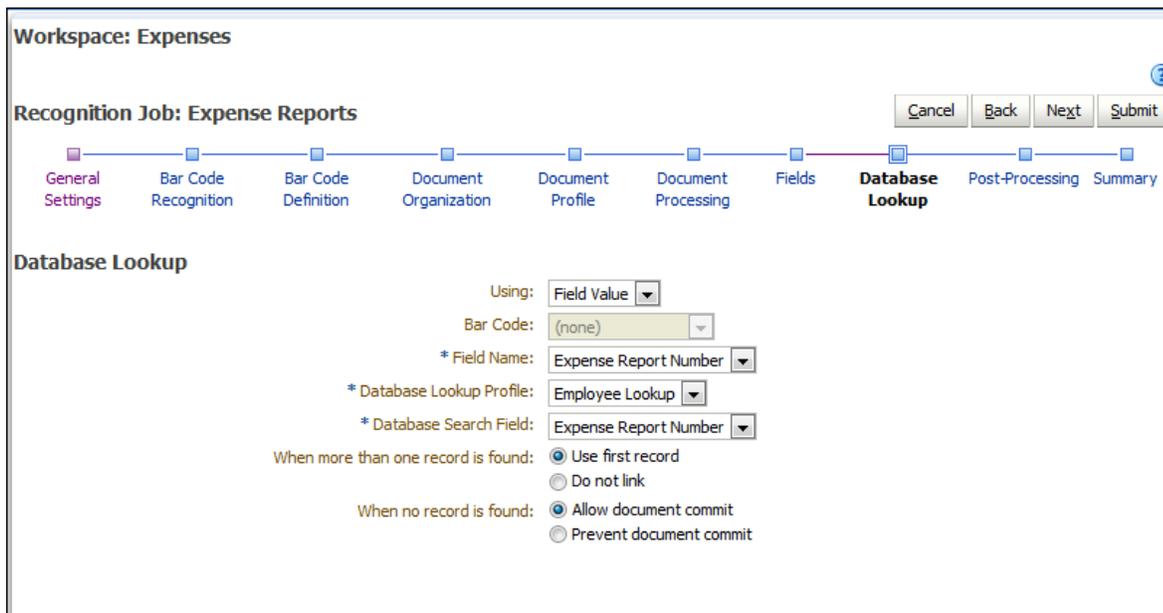
10. On the **Post-Processing** train stop, select **Commit Processor** in the **Batch Processor** field under **When there is no system error** options. As shown in Figure 9–1, batches will flow from this Recognition Processor job to the Commit Processor.

11. Click **Submit** to save the Recognition Processor job.

12. Configure batches to flow from the Document Conversion Processor job to the Recognition Processor job.

    a. On the **Processing** tab, in the Document Conversion Jobs table, edit the **Convert PDFs** job you created in Section 9.2.7.

    b. On its **Post-Processing** train stop, select **Recognition Processor** in the **Batch Processor** field, and select the **Expense Reports** job in the **Batch Processor Job** field.

    c. Click **Submit** to save the Document Conversion Processor job. When you release from the client, the batch will go to document conversion processing, then automatically to recognition processing.

13. Verify the Recognition Processor job.

    a. Temporarily deactivate the commit profile, so that you can see the Recognition Processor job's results in the client. On the **Commit** tab, select the Imaging and/or folder commit profile and click the **Toggle Online/Offline** button.

    b. Sign out of the client and back in.

    c. Capture a batch of image documents (TIFFs) with bar codes. When importing, be sure to select the **Create one document for all import files** option, because the Recognition Processor requires a single document per batch to process.

       Expand the batch and select the document. Notice how it contains no metadata values.

    d. Click the **Release** button to release the batch. Notice how the batch icon changes to indicate processing (gear). Click the **Refresh Batch List** icon.

    e. When the batch icon changes from processing to unlocked, expand the batch, then select a document.

       The Recognition Processor job separated the single document into individual documents based on the page separator you configured in Section 9.2.8. In addition, the job populated the Expense Report Number metadata field with the bar code value it read, as configured. Lastly, the job performed a database lookup and populated the remaining metadata fields using the database lookup return fields (if configured).

Figure 9–17   As a Client User, Viewing Recognition Processor Results (Document Separation and Metadata Field Population)
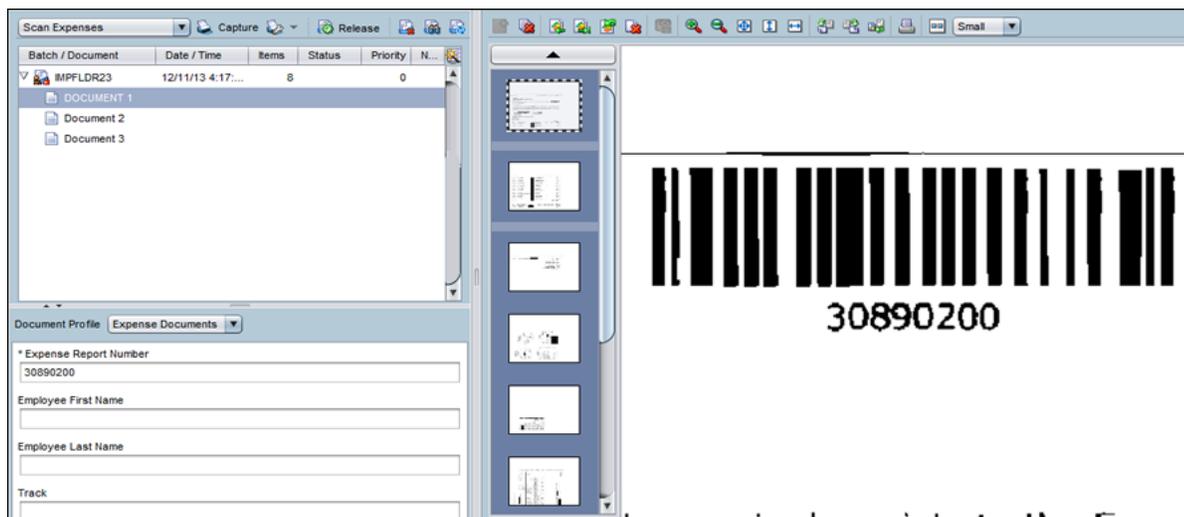
9.2.9 Task 9: Configure Folder Import Processing

In this task, you configure an Import Processor job to import documents from a folder. In an expenses use case, employees may scan expense reports on an MFD to a network folder, and the Import Processor job monitors and imports from the folder at a specified time interval. (Note that you can also configure email import, as described in Section 9.2.10.)

To configure and verify this job's configuration, you will need a shared folder that contains expense report files (PDF or TIFF).

1. On the **Capture** tab, 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 (`Import From Folder`).

    b. Deselect the **Online** field. (When you are ready for import processing to begin, you will change the job to online.)

    c. In the **Batch Prefix** field, enter a prefix (`IMPFLDR`).

    d. In the **Import Source** field, select **Folder Source**.

    e. In the **Import Frequency** field, select **Every 1 minute**.

3. On the **Document Profile** train stop, select the Expenses Documents profile in the **Default Document Profile** field.

4. Complete settings on the **Import Source Settings** train stop.

    a. In the **Import Folder Path** field, enter a path to the shared folder from which to import (for example, `\\FileServer\Expenses\Import`).

    b. In the **File Mask(s)** field, enter the following to import PDF and TIFF files in the folder while bypassing all other files.

        *.pdf; *.tif

    c. In the **After Import** options, select **Delete file** to prevent files from being reprocessed.

5. On the **Post-Processing** train stop, select **Document Conversion Processor** in the **Batch Processor** field and the **Convert PDFs** job in the **Batch Processor Job** field.

6. Click **Submit**. When ready, set the job's status to Online.

7. Verify the folder Import Processor job.

    a. When ready to begin importing, ensure that there are PDF and/or TIFF files in the specified network 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.

    b. Start the client. Wait one minute for imported batches to display in the batch pane. If batches do not display, verify that Capture can access the shared folder you specified.

    c. 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.

    d. After batches are imported, they go to document conversion processing, then recognition processing. Click the **Refresh Batch List** icon, repeatedly if needed.

    e. When the batch icon changes from processing to unlocked, expand the batch. You can see that the Recognition Processor job separated them into individual documents and populated the Expense Report Number field.

    f. The final step in this use case is to activate the commit profile you set to offline earlier. On the **Commit** tab, select the profile and click the **Toggle Online/Offline** button until the profile's status changes to Online.

        Based on the automated configuration, batches that do not encounter batch processor errors will enter Capture via the folder Import Processor job, undergo document conversion if applicable, then recognition processing, and finally commit processing. Batches that encounter errors will display in the client to exception specialists, who resolve and commit them.

### 9.2.10 Task 10: Configure Email Import Processing

In this task, configure how expenses attached to emails are imported and sent for processing. (Note that you can also configure folder import, as described in Section 9.2.9.)

To verify this job's configuration, you will need an email inbox folder that contains email messages with attached expense report files (PDF or TIFF).

1. On the **Capture** tab, 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 From Email`).

    b. Deselect the **Online** field. (When you are ready for import processing to begin, you will change the job to online.)

    c. In the **Batch Prefix** field, enter a prefix (IMPEML).

    d. In the **Import Source** field, select **Email Source**.

    e. In the **Import Frequency** field, select **Every 30 seconds**.

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. In the **IMAP Connection Security** field, select the applicable security connection for the email server. If unknown, contact your email server administrator.

c. Click the **Add** button in the Email Accounts to Process table.

d. In the **Email Address** and **Password** fields of the Add/Edit Email Account window, enter an email address and password.

e. Click **Verify** to verify the address/password entry, then click **OK**.

Figure 9–18 Configuring Email Accounts From Which the Import Processor Will Import Email Messages and Attachments
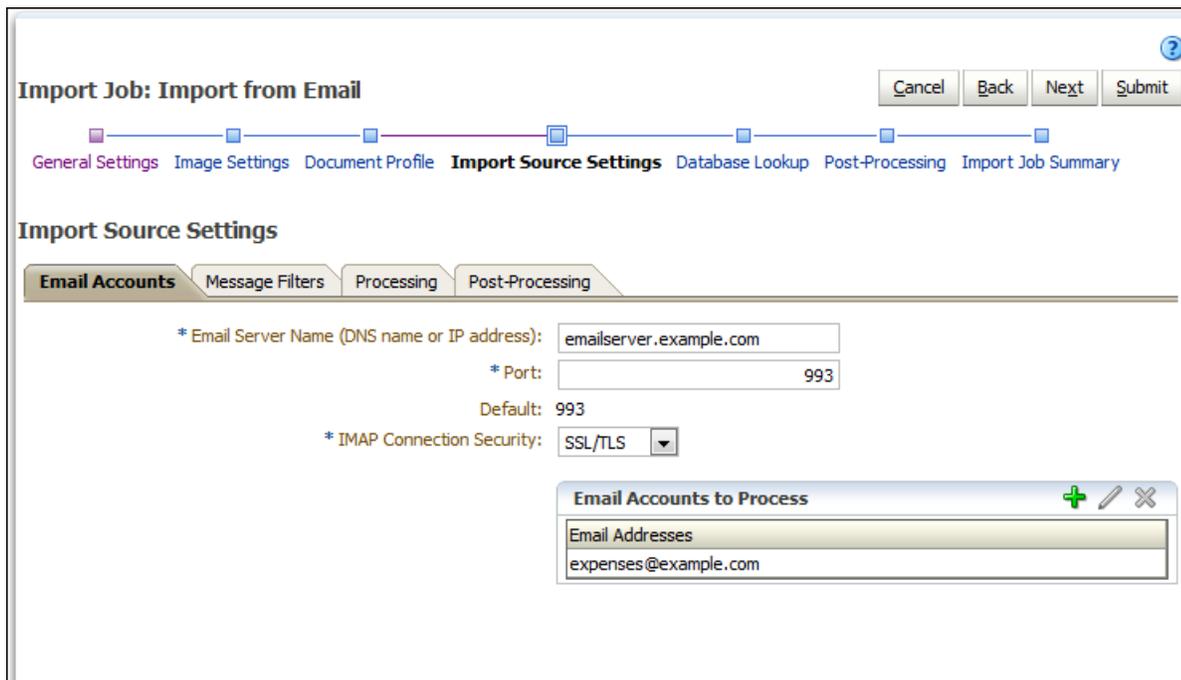
4. On the **Message Filters** tab, specify the folder to process in the **Folders to Process** field.

   For example, you might specify `inbox/expenses` to import email messages stored in an expenses folder in the email inbox. **Note**: The path delimiter may vary depending on the mail server used.

   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 imported). 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, select **Document Conversion Processor** in the **Batch Processor** field and the **Convert PDFs** job in the **Batch Processor Job** field

7. Click **Submit** to complete creating the email Import Processor job.

8. Verify the email Import Processor job.

   a. When ready to begin importing, ensure there are email messages with attached TIFF or PDF 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.

   b. Start the client. Wait at least a minute for imported batches to display in the batch pane. If they do not appear, check the server's log file for any errors during processing.

   c. 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.

   d. After batches are imported, they go to document conversion processing, then recognition processing. Click the **Refresh Batch List** icon, repeatedly if needed.

   e. When the batch icon changes from processing to unlocked, expand the batch. You can see that the Recognition Processor job separated them into individual documents and populated the Expense Report Number field.

9. The final step in this use case is to activate the commit profile you set to offline earlier. On the **Commit** tab, select the profile and click the **Toggle Online/Offline** button until the profile's status changes to Online.

   Based on the automated configuration, batches that do not encounter batch processor errors will enter Capture via the email Import Processor job, undergo document conversion if applicable, then recognition processing, and finally commit processing. Batches that encounter errors will display in the client to exception specialists, who resolve and commit them.

9.2.11 Task 11: Configure Exception Handling

In the expenses scenario, errors can occur at several points.

- **Import Processor:** The email or folder Import Processor job could fail. For example, Capture may encounter errors connecting to or reading from a specified email inbox or network folder.

- **Document Conversion Processor:** The conversion processor could encounter a format that it does not recognize.

- **Recognition Processor:** The processor might not be able to read a bar code due to a quality issue.

- **Commit Processor:** Committing might fail if Capture encounters errors connecting to and writing to a shared network folder. Or, if a batch contains a document in which a required metadata field is blank, the batch does not commit and an error results.

To configure exception handling for an expenses scenario:

1. Optionally set a qualified user to be notified of Document Conversion Processor errors.

   a. On the **Processing** tab, edit the Document Conversion Processor job.

    b. On the **Post-Processing** train stop, enter the qualified user's address in the email notification field under **When there are system errors** options. Click **Submit** to save the Document Conversion Processor job.

2. Optionally set a qualified user to be notified of Recognition Processor errors.

    a. On the **Processing** tab, edit the Recognition Processor job.

    b. On the **Post-Processing** train stop, enter the qualified user's address in the email notification field under **When there are system errors** options. Click **Submit** to save the Recognition Processor job.

3. On the **Capture** tab, click the **Add** button in the Client Profiles table to add a client profile.

   An exceptions specialist can use this profile to quickly view, index, and commit batches that encountered errors in their batch processing.

4. Select settings on the **General Settings** train stop.

    a. In the **Profile Type** field, select **3 - Index Only**.

    b. In the **Profile Name** field, enter `Handle Exceptions`.

5. On the **Batch Filter Settings** train stop, select **Error** in the **Processing States** field.

Figure 9–19   Configuring an Exceptions Client Profile to Display Error Batches Only

6. On the **Document Indexing Settings** train stop, select your Expense Documents profile in the **Document Profiles** field.

7. On the **Security** train stop, assign a qualified user access to this profile.

8. On the **Post-Processing** train stop, select **Commit Processor** in the **Batch Processor** field. This will allow the exception handler to manually complete batches and then commit them.

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

10. Start up the client and log in as the user to whom you granted security access in step 7. Select the Handle Exceptions client profile. Select batches with errors to index and edit, then release them for committing.

10

Performing Advanced Functions

While the Capture system administrator performs Capture system installation, configuration, and overall monitoring, you may need to occasionally perform advanced functions on workspaces to which you have workspace manager access. For example, you might import or export a workspace configuration, or release or export stuck batches.

This chapter includes the following sections:

- Using Workspace Manager WLST Commands
- Exporting a Workspace Configuration
- Importing a Workspace Configuration
- Releasing Locked Batches
- Exporting a Batch
- Setting the Value of an Object Property
- Displaying the Value of an Object Property
- Setting the Credentials for an Object
- Updating a Script within a Workspace

10.1 Using Workspace Manager WLST Commands

Table 10–1 provides a subset of Capture WLST commands, and includes those commonly used by Capture workspace managers. For detailed information on using WLST commands, see *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

To run Capture WLST commands:

1. Install and run the Weblogic Scripting Tool (WLST).

2. Run Capture-specific WLST commands by invoking the wlst script (**wlst.sh** or **wlst.cmd**, depending on platform) located in the Capture Home directory inside Middleware Home (*MIDDLEWARE_HOME*/Oracle_ECM1/common/bin/wlst.sh or wlst.cmd).

   Below is an example Windows location:

   `C:\Oracle\Middleware\Oracle_ECM1\common\bin\wlst.cmd`

   Below is an example Linux location:

   `/home/middleware/Oracle_ECM1/common/bin/wlst.sh`

Either connect to the Oracle WebLogic Server managed server (default port 16400) on which the Oracle WebCenter Enterprise Capture application is deployed, or connect to the Oracle WebLogic Server administration server and change your location to domainRuntime by executing the command:

```
domainRuntime()
```

See "Using Custom WLST Commands" in *Oracle Fusion Middleware Administrator's Guide*.

3. Use the commands listed in Table 10–1 that begin with `list` to identify the workspace or batch to act on by its ID.

4. Use the export, import, or unlock commands to act on the specified batch or workspace, as described in the sections that follow.

Table 10–1   Capture WLST Commands Typically Used by Workspace Managers

Capture WLST Command	Description	Syntax	Example
listWorkspaces	Lists all workspaces (preceded by their IDs) to which you have access.	listWorkspaces()	**Command:** listWorkspaces() **Output:** 4 bills_workspace 2 certificates_workspace 5 receipts_workspace
listBatches	Lists all batches for the workspace specified by its ID.	listBatches(*WORKSPACE_ID*)	**Command:** listBatches(3) **Output:** CERT000000001 CERT000000002 CERT000000007
listLockedBatches	Displays a list of all locked batches for the workspace specified by its ID.	listLockedBatches(*WORKSPACE_ID*)	**Command:** listLockedBatches(3) **Output:** 3 1 EXP1 AUSER AUSER_PC 01/01/13
exportWorkspace	Exports an entire workspace's configuration, including scripts, profiles, and jobs, to a specified xml file at the specified location.	exportWorkspace(*WORKSPACE_ID,'FILE_NAME'*)	**Command:** exportWorkspace(3,'/home/abc/workspace3.xml') **Output:** Workspace successfully exported
importWorkspace	Imports a workspace from an xml file generated with the exportWorkspace command. The workspace you import cannot exist in the Capture database.	importWorkspace(*'FILE_NAME'*)	**Command:** importWorkspace(*'/home/abc/workspace3.xml'*) **Output:** Workspace successfully imported
exportBatch	Exports a specified batch, including images, documents, and metadata, to a specified XML file at a specified location.	exportBatch(*BATCH_ID,'FILE_NAME'*)	**Command:** exportBatch(8,'/home/abc/batch8.xml') **Output:** Batch successfully exported

Table 10–1   (Cont.) Capture WLST Commands Typically Used by Workspace Managers

Capture WLST Command	Description	Syntax	Example
unlockBatch	Deletes the batch lock record for the specified batch, and changes the batch to a Ready state so users can open it in the client. Use the listLockedBatches command to display a list of locked batches for a workspace.	unlockBatch('BATCH_ID')	**Command:** unlockBatch('8') **Output:** Batch successfully unlocked
setObjectProperty	Set the value of a property defined in a Capture object which could be a client profile, a processor job, or a commit profile.	setObjectProperty('<WORKSPACE_NAME>','<CLASS_NAME>','<OBJECT_IDENTIFIER>','<PROPERTY_ASSIGNMENT_STRING>')	**Command:** setObjectProperty('TEST_WORKSPACE','corporate.odc.entity.CommitProfileEntity','profileName=Commit to CS','serverURL=http://myhost.example.com:16200/cs/idcplg/') **Output:** Property successfully updated.
getObjectProperty	Print the specific value of a property of a Capture object which could be a client profile, a processor job, or a commit profile.	getObjectProperty('<WORKSPACE_NAME>','<CLASS_NAME>','<OBJECT_IDENTIFIER>','<PROPERTY_NAME>')	**Command:** getObjectProperty('TEST-WORKSPACE','oracle.odc.importprocessor.ImportJob','jobName=ImportEmail','serverName') **Output:** Property successfully retrieved as: mail.oracle.com
setObjectCredentials	Set the user name and password associated with a Capture object (client profile, processor job, or commit profile).	setObjectCredentials('<WORKSPACE_NAME>','<CLASS_NAME>','<OBJECT_IDENTIFIER>','<USER_NAME>','<PASSWORD>')	**Command:** setObjectCredentials('TEST-WORKSPACE','oracle.odc.importprocessor.ImportJob','jobName=importEmail','xyz@oracle.com','welcome123') **Output:** Credentials successfully updated.
updateScript	Update a script within a workspace.	updateScript('<WORKSPACE_NAME>','<SCRIPT_NAME>','<SCRIPT_FILE>')	**Command:** updateScript('TEST-WORKSPACE','Client_Script','/scratch/scripts/client.txt') **Output:** Script successfully updated.

10.2 Exporting a Workspace Configuration

The exportWorkspace command allows you to output an entire workspace's configuration, including its definition, profiles, jobs, and scripts, to an XML file. When used with the importWorkspace command, the exportWorkspace command can be useful for transferring workspace configurations between environments, such as for testing purposes.

To export a workspace to an XML file:

1. After connecting to the managed server or navigating to the domainRuntime, execute the `listWorkspaces` command to identify the ID of the workspace to export.

2. Execute the `exportWorkspace` command, specifying the workspace ID to export and the file and location of the XML file to be written. See Table 10–1 for command details and an example.

10.3 Importing a Workspace Configuration

The `importWorkspace` command allows you to import an entire workspace, including its configuration (profiles, jobs, and scripts) and data (images, documents, and metadata) from an XML file created using the `exportWorkspace` WLST command. This can be useful for transferring workspace configurations between environments, such as for testing purposes.

To import a workspace from an XML file:

1. After connecting to the managed server or navigating to the domainRuntime, use the `listWorkspaces` command to verify that the workspace to import does not already exist in the Capture system.

   If a workspace already exists, changes in the xml file are merged into the workspace.

2. Execute the `importWorkspace` command, specifying the location and XML file to import. See Table 10–1 for command details and an example.

10.4 Releasing Locked Batches

You may occasionally need to free a batch that is locked to another user, so that it can be worked on.

To release a batch:

1. After connecting to the managed server or navigating to the domainRuntime, use the `listLockedBatches` command to verify the ID of the batch to release.

2. Execute the `unlockBatch` command, specifying the ID of the batch to unlock. See Table 10–1 for command details and an example.

10.5 Exporting a Batch

You may find it useful to export a batch, including its images, documents, and metadata, particularly for troubleshooting purposes.

To export a batch:

1. After connecting to the managed server or navigating to the domainRuntime, use the `listBatches` command to verify the ID of the batch to export.

2. Execute the `exportBatch` command, specifying the ID of the batch to export. See Table 10–1 for command details and an example.

10.6 Setting the Value of an Object Property

The `setObjectProperty` command allows you to set the value of a property defined in a Capture Object. The Capture Object could be a client profile, a processor job, or a commit profile.

After connecting to the managed server or navigating to the domainRuntime, execute the setObjectProperty command by specifying the following:

- Workspace name that contains the object to modify

- Class name that defines the object

- Object identifier which is a key/value pair consisting of the property name of the object to modify and the expected value

- Name and value of the property to update separated by an equal sign

See Table 10–1 for command details and an example. See "Capture Object Properties" and "setObjectProperty" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

10.7 Displaying the Value of an Object Property

The getObjectProperty command allows you to display the value of a property defined in a Capture Object. The Capture Object could be a client profile, a processor job, or a commit profile.

After connecting to the managed server or navigating to the domainRuntime, execute the getObjectProperty command by specifying the following:

- Workspace name that contains the object

- Class name that defines the object

- Object identifier which is a key/value pair consisting of the property name of the object to print and the expected value

- Name of the property to access

See Table 10–1 for command details and an example. See "getObjectProperty" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

10.8 Setting the Credentials for an Object

The setObjectCredentials command allows you to set the user name and password associated with a Capture object (client profile, processor job, or commit profile).

After connecting to the managed server or navigating to the domainRuntime, execute the setObjectCredentials command by specifying the following:

- Workspace name that contains the credentials to modify

- Class name that defines the object

- Object identifier which is a key/value pair consisting of the property name of the object to modify and the expected value

- User name to assign to the object's credential

- Password to assign to the object's credential

See Table 10–1 for command details and an example.

10.9 Updating a Script within a Workspace

The updateScript command allows you to update a script within a workspace.

After connecting to the managed server or navigating to the domainRuntime, execute the updateScript command by specifying the following:

- Workspace name that contains the script to update

- Name of the script to update

- Absolute path to the new script file. The script will be updated with the contents of this file.

See Table 10–1 for command details and an example.